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ARAB REPUBLIC OF EGYPT

MINISTRY OF HOUSING

CONSTRUCTION/CONTRACTING INDUSTRY STUDY

FINAL REPORT - JULY 1981

(in three volumes)

VOLUME THREE

ANNEXES A - G

المركز القومي لبحوث الإسكان والبناء
Housing & Building National Research Center

Since 1954

Prepared by the General Organization for Housing, Building and Planning Research
in collaboration with

The Steering Committee of the Ministry of Housing
Cairo, Egypt

and

The World Bank
Washington, D.C. USA

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ANNEXES A-G

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TERMS OF REFERENCE FOR A STUDY OF THE CONSTRUCTION/CONTRACTING
INDUSTRY, ARAB REPUBLIC OF EGYPT (Dated February 14, 1979)

1. Introduction

1.1 The Government of Egypt recognizes the major and critical input required from the construction/contracting industry to implement its development projects in the 1979-83 Plan and in the longer-term through 1993. It further recognizes that this industry faces many problems at present and a concerted government-industry effort would be required to achieve the Plan objectives. A steering committee has been established by the Minister of Housing (Ministerial Decree No. 24, dated January 22, 1979). The role, responsibilities and attribution of this steering committee are set forth in section 4 below.

2. Objectives

2.1 The objectives of the study are:

- (a) to formulate a comprehensive strategy to improve the capacity and efficiency of the domestic construction/contracting industry (public and private) to meet in an economic manner the country's construction demand
- (b) to make detailed recommendations for the practical implementation of the above strategy.

3. Scope of Work

Collection and Evaluation of Existing Information

3.1 All recent information on building and civil works planning and execution, and on related, basic building materials will be collected and evaluated. Particular attention will be given to:

- (a) the Booz Allen Study and other studies on building materials
- (b) the studies of the housing sector (Ministry of Housing/USAID)
- (c) the University of Cairo/MIT studies on housing construction
- (d) the study for lowest income housing (Ministry of Housing/World Bank)
- (e) the construction study in connection with the transport sector study (World Bank)
- (f) the volume of construction output in the past five years (disaggregated as for the demand forecast in para. 3.2 below).

Demand for Construction Output

3.2 The study will determine the volume, composition and geographic location of the demand for construction output for 1980-83 period based on the 1979-83 Plan, and make reasonable projections of demand for the following ten years. The demand for both these periods will be forecast in physical and monetary terms and be disaggregated by region, by client (public/private), and by type of construction techniques for the following works:

- (a) building (housing, offices, commercial, industrial, educational, hospitals, etc.)
- (b) civil works (roads, bridges, ports, airports, dams, irrigation schemes, water supply and sewerage, etc.)
- (c) industrial installations and special works.

Separate forecasts will be produced as above for new work and for repair and maintenance work. These forecasts will be assessed in the light of the past trend and current status of output of the construction/contracting industry and form the basis of an action-oriented strategy for this sector's development (para. 3.11).

Survey of Current Status

3.3 A review will be undertaken of the present status, output (turn-over) and capacity of the national construction industry for different types of buildings and civil works (to the extent possible along the lines of para. 3.2), taking into account the division of responsibilities and relationships between the larger public firms and smaller private enterprises (including subcontracting), the role of foreign firms and joint ventures. For this purpose a survey will be carried out to cover all the major public and private national contracting firms and representative samples of the medium and small-sized firms throughout the country. Such survey will include information on size of establishment, ownership, organization and management, fixed assets (including plant and equipment), working capital, manpower by skill, type of work undertaken and technology used, capacity/output, growth expectations and constraints.

3.4 The above survey will pay particular attention to equipment and should include the assessment of the mechanization of the enterprises regarding suitability, obsolescence, utilization, need for replacement, adequacy of backup service by dealers, level of maintenance, etc. Such survey should provide also information on equipment available on lease, if any.

3.5 The evaluation of the existing building materials' studies referred to in para. 3.1 above should be updated and complemented, as appropriate, particularly with regard to the distribution system and pricing.