

Bringing People & Knowledge Together

Working across the World



Where we worked 2006/07

In 2006/07 our experts were working and applying their skills for social and economic development in over 143 countries.

Our clients

Public sector organisations

- National governments
- Government agencies
- Embassies
- Independent administrative government bodies
- Public corporations
- County councils and provincial governments
- Regional authorities and corporations
- Local and municipal authorities

International organisations

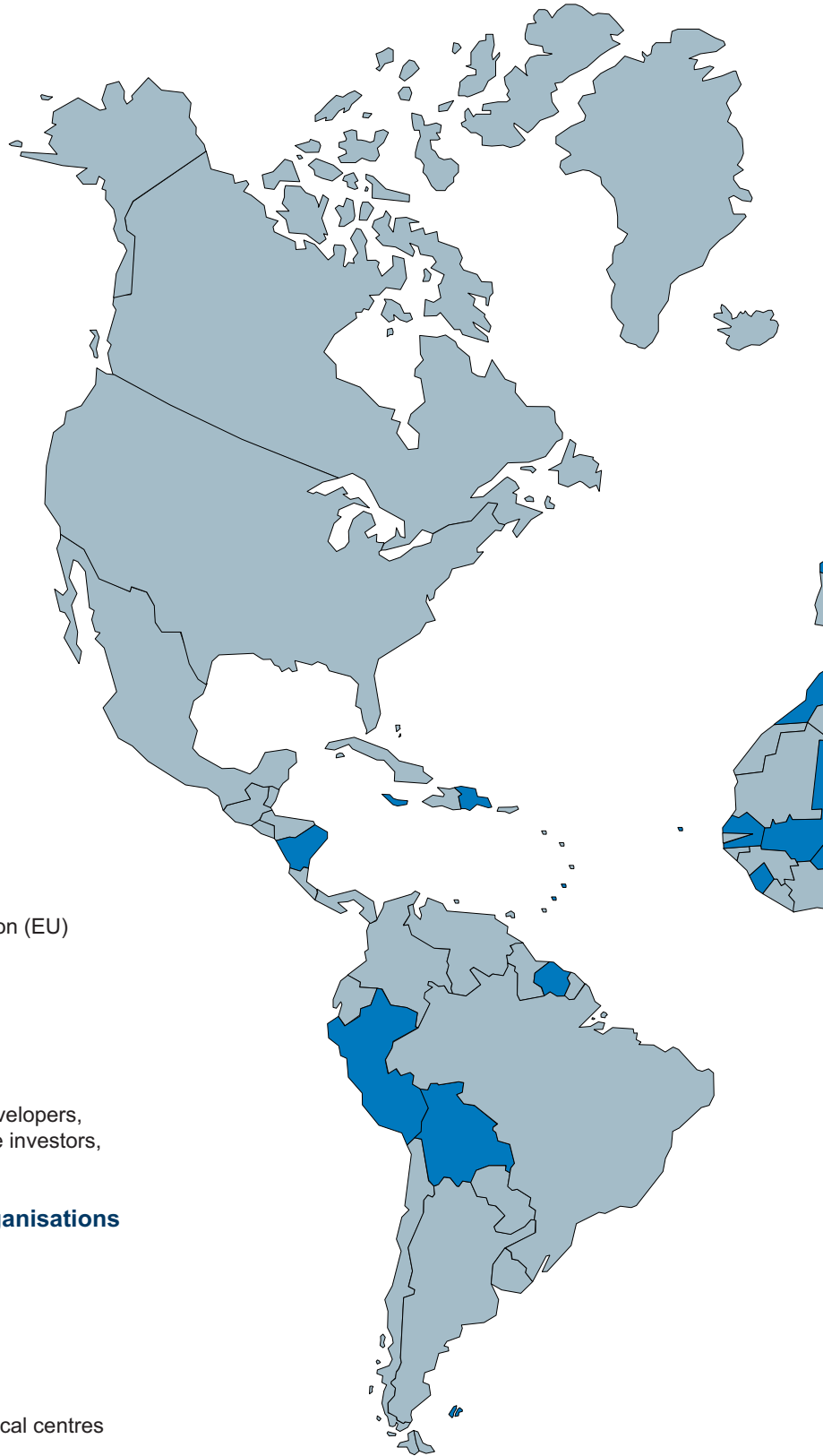
- Institutions and organisations of the European Union (EU)
- International financing institutions (IFIs)
- International development organisations

Corporate clients

- Industrial companies
- Consulting firms
- Others, such as housing corporations, property developers, shopping centres, councils, institutional and private investors, banks, insurance companies, telecom providers

Non-profit organisations and not-for profit organisations

- Non-governmental organisations (NGOs)
- Educational and vocational institutes
- Administrative bodies
- Interest groups and organisations
- Civic groups, clubs and associations
- Chambers of commerce, commodity boards, aerospace organisations, cultural institutions, medical centres



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Introduction

Welcome to the ECORYS Review 2006/07

The aim of ECORYS is to deliver real benefits to society by working with our clients to improve the economic and social conditions of:

- The countries in which we live and have our offices
- The European Union and its neighbouring states
- Developing countries.

In 2006 and 2007, our permanent staff of over 560, supported by another 400 network partners, have applied their economic and social science experience to an astonishing number of assignments – working in over 143 countries throughout the world. Our work ranges from the local to the national and international levels and is applied to all aspects of the policy cycle – from research and advice right through to programme management, delivery and finance. We are continually making the links between the local and the international level; between programme delivery and policy formulation; and between experience from one country or region and its value elsewhere in the world.

We cannot describe all of this varied and exciting work: in this review we can only give you a flavour of its nature and scope. You will find examples of the types of work we do and the way in which we are engaged in the different parts of the world we serve. We also set out our areas of competence, the location of our offices, how we are structured and where you may contact us. You will also meet a few of the people who work in ECORYS. Like the rest of their colleagues, they are talented and committed people, who have chosen to work for ECORYS because they want work that makes a difference and that enables them to fully develop their professional capacities.

This year we have broken with tradition. We have published two reports: this Review 2006/07 and a separate Annual Report 06 (published earlier in the year) which gives an overview of our development as a company and our performance in 2006.

We are proud of the work we do, the contribution that this makes and the often long-standing relationships we have with our clients and partners. My colleagues and I hope that this Review will give you a flavour of our knowledge, commitment and quality.

Hugh Williams

Chairman

ECORYS Board of Management

Who we are

ECORYS is an international company specialising in applied economic and social science. We work with clients in the public, private and not-for-profit sectors and apply our expertise to improve the economic and social conditions in:

- The EU 27
- The EU enlargement area
- EU neighbouring states
- Developing countries

We are a company of people engaged in the economic, social and spatial policy agendas of the countries in which we work and live. Our involvement ranges from local issues such as housing, regeneration and social deprivation to national and global issues such as economic development, competitiveness, trade, development co-operation and poverty eradication.

Sound analysis, inspiring ideas and effective delivery

We take pride in our ability to translate the results of rigorous analysis and research into innovative, practical advice and support. We are convinced that these qualities are needed by our clients to help them realise their ambitions and to do their job well. We work at all stages of the policy cycle, from problem identification and the development of solutions to their financing and implementation, and finally the evaluation and monitoring of impact. We support our clients through advice, consulting, training, process management and programme management and delivery.

Independence, integrity and impact

ECORYS attaches great importance to evidence-based advice. We are financially independent, and offer unbiased advice and support. This underpins the integrity of all we do in our work and in our relations with clients and partners. We value highly integrity and social responsibility and feel strongly about social engagement and making a difference to the world around us through our work.

Commitment, continuity and quality

Management and staff hold the majority of the shares of ECORYS. This safeguards the independence of the company and strengthens our commitment. We have a large complement of permanent staff, which provides continuity and reliability to our clients. The experience gained by our staff is retained within the company for the future. We ensure quality by drawing on this experience but also by improving our knowledge and methods through our in-house research programme. This research is also supported by the Foundation the Netherlands Economic Institute, one of our founding shareholders.

Vision and Objectives

Our vision is to grow from our European base to be a transnational company with a global reach, based on European values. Hence to be one of the world's leading specialist companies in applied economics and social science. We will retain our independence as a successful, employee-owned company, deserving the respect of our staff and our clients. We will continue to offer room for the professional growth and development of our colleagues and aspire to make evermore positive contributions to the economies and societies in which we work locally, nationally and internationally.

Strategy

We are growing our company so that we can increase the scope and quality of our services. Strengthening our research base and our staff numbers is part of this strategy. We are also opening new offices and building companies across a wider number of countries and increasing our partnerships elsewhere. To do this, we are actively investing in organic growth but we also seek partnerships with like-minded organisations who share our ambitions and values.

Our people

ECORYS is committed to attracting and retaining people with different talents, ambitions and interests. What binds us, is the pride we take in our work and its impact, in improving our work processes and in creating an efficient, co-operative and professional working environment. ECORYS is always looking for 'the best of the class' and we welcome people with the talent and the ambition to become the best in their field.

Being a "knowledge company" means people are our most valuable asset. We offer our people room for personal and professional development and a varied and professional work environment. We stimulate the development of knowledge and skills through in-house training and coaching, but also through external programmes.

Bringing people and knowledge together

It is a core value of ECORYS to make a positive difference to the economic and social development of the countries in which we work. To be truly effective our advice, ideas and the way we help deliver solutions must be based upon sound analysis combined with strong experience of practical application.

We have a number of ways of achieving this. The ECORYS Research Programme (supported also by the Netherlands Economic Institute Foundation) undertakes applied research in key areas of our work. Staff from all parts of ECORYS take part; bringing to it their professional disciplines and also their applied experience. Through it we deepen our understanding and intellectual capital by developing new methods and approaches.

The fact that we have such a large complement of permanent staff (over 560) is also important. The experience that we gain from assignment after assignment accumulates with the permanent members of ECORYS, improving our collective understanding and the support we can offer our clients. This structure also means that we can pass that experience on to newer members of ECORYS through training, mentoring and particularly on-the-job-training in project teams.

The strength of our in-house capacity is well recognised and clients turn to us when they want particular help or find themselves in difficult situations. For example, UNDP asked us at short notice to monitor the Nigerian census. A difficult and challenging task to deploy quickly over 100 monitors for which we were able to mobilise the varied expertise required from all over the different parts of ECORYS. In the UK, the national government came to us directly to ask us to help them in delivering a series of final assessments and audits when they realised they did not have the expertise to do it alone. Of course, we also bring in specialist expertise when we need complementary skills and we have the capacity and structure to mobilise and manage inputs from appropriate partners from academia or practise as necessary.

We apply our economic and social science expertise to an astonishing variety of local, national and international assignments. These vary from helping to reform the budget procedures in the Ministry of Agriculture in the Russian Federation, or providing advice on new financial instruments for the TENS programme of the European Union, to assessing the impact of new 'community justice centres' in UK inner cities and addressing the impact of opening the Netherlands borders to workers from Eastern Europe or supporting capacity building in developing countries.

Working in so many different countries enables us to bring experience and learning from one place to another; for example in taking the experience of programme management from the UK to Poland and Norway; or transferring to Turkey the knowledge and understanding of support policies and programmes for women entrepreneurs gained from working in the Netherlands and elsewhere in the European Union.

Whether the causes be local, national or international, rapid economic and social changes are affecting all our countries today and they require careful analysis, thoughtful and informed solutions and effective delivery of responses. In a short review of this type we can only hope to give a flavour of the wide range of issues and responses with which ECORYS is involved. You will find examples of these in the subsequent pages. We have arranged them by the broad geographical areas in which we work.





The European Union

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One of the major geographical areas in which we work is of course the European Union (EU). ECORYS has (and has had throughout the history of its constituent parts) a long involvement not only with the individual countries in which it originated, but also with the development and growth of the European Union as a whole, from its beginnings as the European Coal and Steel Community to the present-day European Union of 27 Member States.

In each of the EU countries where we have offices we work with clients to address local, regional, national and even international issues. Our clients vary from local authorities to regional and national government and agencies, to non-governmental organisations and a number of private sector companies. The problems that they face can be unique to one country or location. They can also have similarities or even common roots, in which case exchange of experience from one location to another can be very productive.

We also work extensively for the European Institutions (The Commission, the Parliament, the European Investment Bank, etc.) covering policy issues and programmes across the whole of the Union and beyond. In doing this, we draw on the experience of our individual, national offices and also of partners in other member states. In many spheres, the EU forms the framework within which national policies and programmes are framed, or at very least, influenced. In these circumstances there is a two-way traffic at play. Our policy work for the European Commission (EC) forms an important context and understanding for much of the work we do at national and local levels - and vice versa.

For example, during 2006 ECORYS completed work with the EC on a major analysis of the state of European cities and on a series of pieces of work with the European Investment Bank, and the UK presidency of the EU on regeneration and sustainable cities. These complemented and were informed by our work at national level. In Hungary, we advised on the roll-forward of regeneration plans for Budapest; our company in Belgium worked with our Dutch arm to develop the first urban regeneration fund; and in the UK we advised on the national programme for housing renewal.

This transfer of understanding between the different countries and levels at which we work is also evident in other fields. Our work for DG TREN was complemented by studies of road pricing and congestion charging in the Netherlands and the UK; and feasibility work on the high-speed rail link between Lisbon and Porto.

In the fields of labour markets and social policy we have been working for the European Commission on the lifelong learning aspects of the "Lisbon agenda". This has been complemented by work elsewhere, including vocational guidance in Poland and the access of special groups to universities in the UK. The same may be said of other fields, such as innovation, research or regional development.

In these next few sections we give an idea of the type of work we are involved with for the EU institutions and also in the countries within the EU where we have our offices.

ECORYS has also been closely involved in the processes of enlargement of the European Union, with its engagement with its neighbouring states and with developing countries. These long-standing aspects of our work are illustrated in the later pages of this review.

EU Institutions



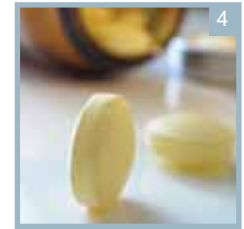
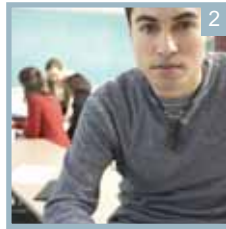
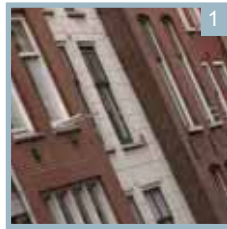
The European Commission remains one of our most important clients and we consequently take great interest in developments in and around the European capital. While a compromise has now been reached on the way forward about the Constitutional Treaty, attention in Brussels is already shifting to the review of the EU Budget in 2008/2009. ECORYS is helping to prepare the Commission with this review through a Study on EU Spending, carried out directly for Commissioner Grybauskaite for Financial Programming and Budget.

The renewed Lisbon agenda for "Growth and jobs", including reform of Europe's welfare systems in the context of an ageing population, remains a core EU objective. In 2006, we started to provide structural support to DG Research with the production and analysis of R&D policy indicators. We have also been awarded an exclusive evaluation framework contract with DG Education, allowing us to study the effectiveness of a range of educational programmes and initiatives, such as the Culture 2000 Programme, the European Centre for the Development of Vocational Training (CEDEFOP), Erasmus Mundus, etc. But we are also increasingly involved in hands-on types of work, such as the organisation of events for the EU Agency of Fundamental Rights.

Meanwhile, the issues of climate change, energy and environment are rising to the top of Europe's political agenda. This leads to challenging questions: for instance, how does the security of energy supply relate to competitiveness and sustainable development? These subjects are increasingly intertwined, as we can see from our analysis of the contribution of transport policies to competitiveness – a comparison with the USA. And what instruments and tools are needed to

implement the new and ambitious policy objectives? We address such questions by supporting the Commission's Progress Report on EU Sustainable Development Strategies and through a review of Environmental Policies. But we have also done so through a study on the contribution of the European Investment Bank to sustainable urban development, an intergovernmental initiative funded by the UK, Germany and Italy.

In an effort to make policies more effective and efficient, all new European policy initiatives must be accompanied by an impact assessment, examining the likely economic, social and environmental impacts of the measures proposed. In 2006, ECORYS was awarded a framework contract from DG Budget to carry out such impact assessments and other prospective evaluations across the Commission. This allows us to continue to apply and strengthen our competence in areas such as cost-benefit analysis, modelling and scenario development. By doing so, we are confident that this helps to develop better policies – that contribute to improving the lives of people across Europe.



1 Making the Urban Audit more useful

DG REGIO of the European Commission maintains a data base on 258 cities called 'the EU Urban Audit'. It covers large numbers of facts and figures on urban demography, competitiveness and social cohesion in cities. In 2006, ECORYS was asked to analyse the quality and usefulness of the Urban Audit for urban policy makers and to come up with ideas for increasing its utility. Following an analysis of the strengths and weaknesses of the current data set, we introduced three innovations: (i) A typology of cities to make comparisons easier between developments in Europe's main urban areas; (ii) New indicators to cover Urban Governance, which is increasingly recognised as a key factor in urban development; and (iii) An overview which makes it easier to extract from the data base relevant information for designing and refining urban strategies. In the summer of 2007, this policy research work was successfully completed when the Commissioner for Regional Policy launched the publication of the new State of European Cities report as a useful evidence base for urban policy and decision makers.

janmaarten.devet@ecotec.com

2 What about equality?

The EU programme for stimulating mobility of students in higher education is called ERASMUS. Our study focused on the 'Equality dimension' of the programme. DG Education and Culture commissioned us to analyse the socio-economic background of the students participating in the 2004/05 programme and compare the results with those from a similar study undertaken in 1997/98. Using an electronic survey of ERASMUS students we received 15,000 responses, which we analysed and compared with data from the previous survey. We found that the proportion of students from families with below average income levels and whose parents had not participated in higher education remains below that found in higher education overall. These findings support further efforts from DG Education and Culture to remove the socio-economic barriers that remain to participation in ERASMUS.

andrew.mccoshan@ecotec.com

3 What to include in the EU Energy Package?

At the end of 2006, an ECORYS-led team was commissioned to support DG TREN in preparing an impact assessment of the various options for the new EU legal framework for the energy sectors. This so-called Energy Package includes a range of measures designed to improve the functioning of the internal electricity and gas markets in Europe and is planned for adoption in the course of 2007. We consulted relevant stakeholders and made a cost-benefit analysis of the proposed options. The assumed causal relationship between the proposed actions and the intended effects of these in the energy markets were analysed using logframe techniques. The results of this work were then tested against the views of selected European stakeholder platforms and their members using a web-based questionnaire. The information coming from both elements of the study was used as input for a qualitative and, where possible, quantitative social cost-benefit analysis. Our findings provide a sound analytical basis for informed decision making on the contents of the Energy Package.

peter.vis@ecorys.com

4 How much regulation for pharmacies?

Regulation of community pharmacies is meant to ensure that citizens have access to high-quality pharmaceutical products and services (at affordable prices). However, the way in which EU Member States regulate, varies substantially both in scope and nature. At the end of 2005, DG Internal Market of the European Commission contracted ECORYS to learn how the pharmacy sector in the then EU 25 was regulated and what impact this regulation has on the performance of the sector. Our study involved, inter alia, data collection through a survey of pharmacy representative organisations and policymakers in all the Member States. One of the findings of the study was a clear negative relationship between restrictions on the ownership of pharmacies on the one hand and productivity and economic efficiency on the other. Our findings give DG Internal Market new evidence and insights for further policy development in this field that is likely to yield benefits for EU citizens.

bjorn.volkerink@ecorys.com

The Netherlands



The Dutch market for our research and consultancy services has recently shown some marked characteristics that affected our portfolio in a very positive way. First of all, there was a growing need for new services, partly based on a change of government with new policy perspectives. We were engaged in a growing number of interesting assignments in our core competence areas including real estate, urban and regional development, labour and social policies, governance, infrastructure and mobility, and competition and regulatory issues.

What adds to our competitive advantage is the fact that assignments in the Netherlands are tending to be more complex in nature. They are taking European policy developments more and more into account, and require a broad spectrum of services (from research, advice, conceptualisation, process management to actual programme delivery or communication advice).

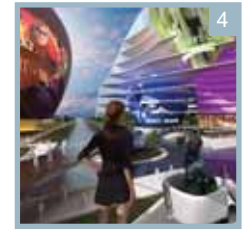
Another trend supporting our business development is the decentralisation of budgets from the national to regional and local levels. We were therefore engaged in local and regional competence building and assisting clients with various issues related to managing these budgets in an efficient and effective manner.

Following our long tradition of involvement in leading social and economic issues, we again presented research-based analyses on key issues, some of which proved to be clearly visible in the public debate. A hot issue is road pricing. ECORYS carried out economic and financial analyses for this policy tool for the Dutch Government, and also delivered technical assistance to the ministerial working group that leads this initiative.

Another issue with considerable public interest is opening the Dutch borders for employees from Poland and seven other Eastern European EU Accession Countries. ECORYS' analysis of the effects was a critical input into the Dutch Government's decision to allow free movement of employees from these eight countries in 2007.

Activities in the real estate market took an interesting turn - ECORYS is one of five accredited companies for the pilot of social audits on housing associations. This pilot is the initiative of a network of housing associations. The social audit describes and judges performances against the background of an association's own Ambitions and Goals, the Tasks in its area and its Financial Possibilities. Relevant stakeholders are also asked to judge the performances.

Research and advice on parking and mobility management added to the diversity of activities in 2006 and 2007. So did our work in the field of communication advice, including such services as city and location marketing and corporate communication advice. Another example of our broad range of services is the social and economic impact assessment of policies directed towards creating a smoke-free hotel and catering industry. Finally, we also advised using tools such as our economic cost-benefit analysis on a range of issues including assessing the impacts of alternative national house building schemes around cities, i.e. either by intensifying construction city-inwards or on the other hand by expanding outwards.



1 Free movement of labour?

The Netherlands is one of the EU member states that put restrictions on the free movement of labour from the countries that acceded to the European Union in 2004. In May 2006, the first transitional scheme period came to an end and the government had to decide whether or not to continue it for another three years until May 2009. ECORYS was asked to provide the evidence base for decision making. Our study covered policy goals, sector experience with labour migration from Poland and the specific experience of a Dutch region where many Polish workers are employed. Our final report provided the evidence base needed and included: (i) information on enforcement of regulations; (ii) facts on the actual versus expected scope of migration; and (iii) economic and labour-market effects, and also socio-cultural effects. Our findings were widely discussed in the press and provided a key input for the debate in the Parliament on free access. The final political decision was that restrictions could be lifted and flanking policies should be enforced.

peter.donkervanheel@ecorys.com

2 Preparing the way for road pricing

Congestion on roads, traffic accidents and emissions impose large external costs to society that are not fully reflected in the price of road transport. Current measures such as road taxes and parking charges do not adequately reflect these external costs and are, from an economic perspective, inefficient. ECORYS has for a number of years supported the Government in its search for new policy measures that might be more efficient. We studied the economic impact of different designs for price-based policy measures on the markets for car fuel and second-hand cars. We addressed the necessary legislative changes to implement tolling schemes that charge road users for using certain roads at specific times. In addition, we used our expertise to support the expert and stakeholder platform 'A Different Way of Paying for Road Use', set up by the Government for identifying policy measures that can rely on broad public support. Our work has provided a sound knowledge base for the political debate and the implementation path is currently being prepared.

johan.gille@ecorys.com

3 Beyond the conventional approach

The development of business parks is dependent on the demand by entrepreneurs. Unfortunately, demand and supply are not always in equilibrium. ECORYS addressed this issue for the Province of South Holland, the City Region of Rotterdam and the Council of Rotterdam; we developed the concept of "Quality Match Business Parks". This is an instrument that qualitatively matches demand and supply of business parks at a regional level. Applying it to the region of Rotterdam has shown that there is a surplus, as well as a scarcity of business parks. For the most common forms of businesses there is enough available space in current business parks. However, in port- and harbour-related businesses and industrial businesses this is not the case. Yet these types of business activities are what the region considers to be its main strengths and hence this raises important questions about the available capacity of the region.

walter.hulsker@ecorys.com

4 The economics of Experience Park Limburg

Dutch property developer Bouwfonds MAB aims to realise a 169.000 sqm innovative retail and leisure centre in the business park of the municipality of Venlo. The business park borders on the site of the upcoming (in 2012) 'Floriade' event, the world's biggest flower and gardening exhibition, which is held once every ten years in alternating locations in the Netherlands. Bouwfonds MAB asked ECORYS to undertake an ex-ante economic impact assessment of their project. Our study revealed three aspects which are important for the stakeholders. The project is likely to generate some € 430 million in annual sales and create approximately 5,500 new full-time jobs. The project, moreover, may have positive image effects on the city and the province. Part of these gains, however, would be offset by negative turnover effects on the retail sector in the inner city of Venlo and the region. These findings are an important input for final project design and decision making by respective municipal and regional authorities.

toine.hoofft@ecorys.com

The United Kingdom

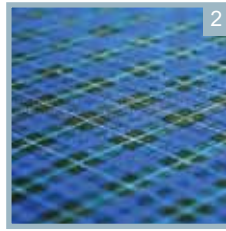


The United Kingdom is currently the largest 'home' market for ECORYS, with the full range of programme management, research, consultancy, institution building and capacity development, communication, financing and evaluation services delivered to public, private and third-sector clients through the ECOTEC brand. Six regional offices in England and Wales support regional and local markets, whilst ECOTEC also operates throughout the entire UK at the national level and on the EU policy agenda.

With expenditure on public services under constant pressure, governments and public authorities are increasingly concerned about the effectiveness of services. In line with these trends, demand is growing for sound research and policy advice, but also for delivery, often leading to integrated projects. ECOTEC's work on housing market renewal in major Northern cities has seen large-scale analysis and forecasting combined with intensive public consultation, development of integrated delivery plans, and evidence giving at public inquiries. Our work in the youth justice field has revolutionised the delivery of high-quality education to young people in custody through a combination of innovative instructional design, training of educationalists and integration with inmate management processes to ensure continuity of provision.

The rapid rise in concern over climate change has seen increased interest in alternative energy futures, reflected in ECOTEC's work on the potential for the hydrogen economy in the Midlands, but also throws up policy contradictions. Our recent work on regional airports sees more attention being paid to the trade-off between regional economic development and carbon emissions.

Education and learning remains a major national preoccupation, with increased attention being paid to supporting learners to 'stay the course'. ECOTEC's work on financial support packages for learners, and parental involvement in schools is helping create the backdrop needed for learning to be taken up effectively.



1 Helping deliver grants to the 'Third Sector'

ECOTEC (ECORYS in the UK) has helped the UK Office of the Third Sector (part of the Cabinet Office) find a small number of strategic partners. These are organisations with a strong track record in representing the third sector and informing the policy debate on issues including volunteering, charitable giving and social enterprise. In a series of projects, we designed application materials, operated help-lines and assessed proposals to help select potential strategic partners. Our work facilitated some € 67m of funding support for 45 organisations in the voluntary and community sector. The quality of our guidance materials and information services - and their contribution to meeting the client's objectives - were recognised in a case study of good practice in the Treasury publication "Improving Financial Relationships with the Third Sector: Guidance to Funders and Purchasers". Our work at the interface between the third sector and Government presents many challenges, but our role in helping start new relationships places us at the heart of policy development.

rachel.brackwell@ecotec.com

2 Value of 'tartan' to Scotland's economy

ECOTEC undertook research for Scottish Enterprise, Scotland's main economic development agency, to establish the economic contribution of the tartan industry to Scotland. Although the economic significance of tartan (the Scottish chequered fabric) was recognised prior to our work, there were no reliable estimates as to the overall value of tartan to the economy. Through application of our REMI-ECOTEC Model, a leading regional economic model, we were able to provide, for the first time, robust and well-founded estimates. Our analysis revealed 'tartan' as a very significant contributor to the wider Scottish economy, amounting to € 475m p.a. (0.5% of Scotland's GDP) – equivalent to some 4,000 jobs. The Enterprise Minister for Scotland commented that "the report provides solid evidence that the tartan industry make a significant contribution to the Scottish economy." Our work provided the foundation that was needed for the Scottish Government's decision to establish a National Register of Tartans to support and enhance the industry.

chris.whitfield@ecotec.com

3 Making Housing Count for the Manchester-Salford Partnership

During 2006 and 2007, ECOTEC has been examining housing markets across the Greater Manchester City Region for its "Making Housing Count" report. The City Region is a key driver of the North West UK regional economy. Projections point to significant employment growth in skilled and professional jobs in the future, while the traditional manufacturing economy is replaced by service industries. Whilst employment growth presents an opportunity to reverse the decline of this urban area, it can only be achieved with new, quality housing for new employees. But the housing offer must differ from the city centre market in Manchester Salford, currently characterised by apartments for rent or sale, many of which are investment properties (more than 20% are vacant). The challenge is to convince developers to build in other areas, and hence transform them. Our work provides an evidence base supporting critical decisions on housing, transport and environment and enabling the development of appropriate strategies.

paul.jeffrey@ecotec.co.uk

4 Workshops with young people

The UK Government asked us to hold workshops in seven '14-19 Pathfinder' areas. In these areas reforms to the Government's skills policies are being developed and tested, as part of the Government's goal to create a world class education system for 14-19 year olds. The workshops gathered young people's views and ideas on aspects of the reforms including: Functional Skills and Diplomas; Raising the Participation Age; and Collaboration. We made the workshops locally relevant through a review of Pathfinder activities and discussions with all local stakeholders, including Pathfinder Co-ordinators, Connexions (the careers service), schools and colleges. The workshops were held with young people aged 12-19 from across the ability range, including those with special educational needs and disabilities. We used innovative and creative exercises to help them express their views, including voting polls, theatre games and marketing campaigns. Our work helped determine how young people make choices about their education, allowing Government to develop appropriate promotion and information services. It also helped develop the right learning approaches to make the reforms work in practice.

jenny.williams@ecotec.com

Belgium, Hungary, Poland, Spain



The ECORYS operating companies in Belgium, Hungary, Poland and Spain are growing in response to the particular needs and developments in each of these “home markets”.

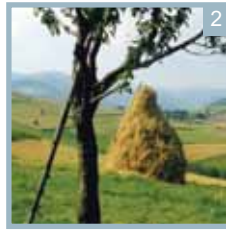
In Belgium through IDEA (the ECORYS brand in Belgium) we are working across the full range of policy areas including issues in regional and urban development, labour markets, real estate, and regulation, innovation and R&D. Our work on assessing and removing the administrative burden of regulation has been ground-breaking in Belgium as has our work on evaluating the effectiveness of R&D support to firms through an understanding of the behavioural responses of firms. Our ability to bring together the financial aspects of development with the urban and regional needs for development has resulted in us being able to provide a wide range of support to developers and investors as well as public agencies.

In Spain our work ranges from social and education/labour market issues to regional development, energy (renewables) projects and evaluation of programmes. We have been heavily involved with evaluating and then providing advice for the future management of the European Social Fund programmes in Spain and evaluations of the interreg “Atlantic” programme – covering a wider area. There has been a growing demand for our expertise in relation to equal opportunities programmes and policies, both at the national and the regional level. In 2006/07, we were asked to undertake one of the first ever evaluations of the effectiveness of government

support/aid programmes to North African countries through an evaluation of programmes in Morocco. Our Spanish office is playing a key role in the ECORYS Research Programme project on immigration – where an understanding of the experience and pressures on Spain is an important element.

ECORYS has had a continuous association with Poland and Hungary since their pre-accession period in the 1990s. Activities in these countries are currently focusing on building capacity to manage and administer their own EU Structural Funds. In Poland, the diverse range of work includes support to human resources development and training in vocational guidance, as well as support to developing e-business and innovation strategies, and evaluation of training programmes. We are now also managing a major funding programme to support NGOs in Poland.

In Hungary, the main activities relate to urban planning and regeneration, with key contracts with local authorities and private developers for housing renewal. Urban regeneration in the greater metropolitan area of Budapest is a key issue, as is the emerging need for the development of well-founded projects for Structural Fund support in the regional/urban development field.



1 Belgium – Understanding R&D subsidies

R&D subsidies for enterprises are an important pillar of Flanders' innovation policy. IDEA Consult (ECORYS in Belgium) has analysed the impact of subsidies on innovation policy of enterprises and has focused attention on the need for behavioural additionality of R&D subsidies. This means that in order to design and implement an effective and efficient subsidy programme, one needs to properly understand why and how it will change company behaviour and promote company decisions on innovation investment. In 2006, the IWT (Institute for the Promotion of Innovation in Flanders) became our client with the request to evaluate its portfolio of enterprise R&D subsidies with our behavioural additionality methodology. On the basis of an extensive survey and some 50 case studies, we explored whether the IWT support has had an impact on, for example, the scale and scope of the subsidised projects, the collaborative behaviour and the innovation processes within the companies. The study shows that IWT-subsidy instruments do make a difference. The study also provided more evidence for the relevance of the behavioural additionality methodology when one tries to make a sensible assessment of the impact of subsidies.

wim.vanderbeken@ideaconsult.be

2 Poland – Operating the NGO Fund

The Non-Governmental Organisations Fund (NGO Fund) is part of the European Economic Area (EEA) Financial Mechanisms. The Fund, with a budget of € 37.8 million for three lots, enables Polish NGOs to carry out activities that contribute to reducing economic and social disparities within the EEA as well as increasing the role of the civil society in Poland. It also encourages co-operation between Poland and the donor states: Norway, Iceland and Liechtenstein. ECORYS Polska operates Lot II: Environmental protection and sustainable development (in consortium with Kommunalkredit Public Consulting GmbH), and Lot III: Equal opportunities and social integration (with ECORYS in the Netherlands and the UK). Our task is to distribute the financial resources for the NGOs. This includes: creating procedures for project selection and for awarding grants; creating guidelines for reporting; receiving and assessing applications to the Fund; monitoring of the grants implementation process; audit of grants and financial management including responsibility for payments to final beneficiaries.

rafal.szakalinis@ecorys.pl

3 Hungary – Planning the Government district

For a Spanish development company, ECORYS Hungary and its partner consultant Otthon Centrum, prepared a market-based analysis of the development potential of the planned new government district of Budapest. This covers the area behind the Western Railway Station but the study also surveyed the neighbouring districts 13, 6 and 5. We assessed the existing public service infrastructure and the supply of various private residential and office property. Our report also analysed the planned developments in these fields, including the projected demographic trends and provided details of the main developments in the real estate market. Our study identified which areas would be most suitable for establishing retail facilities, commercial offices, government offices hotels, conference facilities and residential development and general public facilities. The study provided our client with commercially highly valuable information.

karacsonyk@ecorys.hu

4 Spain – Development co-operation with Morocco

ECOTEC, (ECORYS in Spain) evaluated development co-operation between Spain and Morocco and Spanish aid given during the period 2001-2005. The study was commissioned by the Ministry of Foreign Affairs and is of interest because it was the first country programme evaluation the Ministry ever commissioned; and because it is one of the Spanish Government's new initiatives to boost the 'evaluation culture' in development co-operation. Based on desk research, focus groups and interviews with stakeholders in Spain and Morocco, the study covered two levels of analysis: a) policy design and implementation in Morocco; and b) case studies in three key sectors democratic governance, health, and education. The evaluation report gives recommendations on how to enhance the strengths of (and overcome the weaknesses in) the programme's effectiveness, strategic design, operational management, instruments applied, and of the results and impacts realised. Our findings and recommendations were considered relevant and useful and the government has decided to follow up with country evaluations in Angola and Mexico.

sonia.vega@ecotec.com

EU enlargement area

ECORYS is committed to supporting the accession process of candidate states to the European Union and has had a long and fruitful presence in Central and Eastern Europe since the early 1990s.

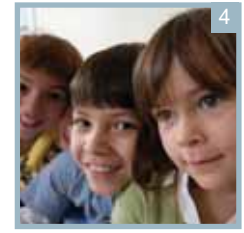
In 2006/07, a substantial number of activities were carried out in Bulgaria and Romania, the newest countries to join the EU in January 2007. Being actively present in Bulgaria for almost 15 years, ECORYS assisted a wide range of governmental bodies in their strategic planning and capacity building for future EU membership. Support was given to the Ministry of Finance as a managing authority for EU Structural Funds. The Ministry of Economy and Energy was given continued support in designing and implementing measures from the national innovation strategy that was developed with the assistance of ECORYS two years ago. The Ministry of Transport was helped in developing a national transport strategy. The Ministry of State Administration made use of the expertise of ECORYS in developing the Operational Programme Administrative Capacity. In Romania, our activities concentrated on supporting SME policy and business development centres in all regions of the country. Large-scale horizontal capacity building on EU Structural Funds started in 2006. In both countries ECORYS has carried out institution building of the respective bodies concerned with the implementation of new quality infrastructure and the EU Water Directive.

In 2006, ECORYS launched an operating company in Bulgaria to serve the national market and to co-ordinate activities in the countries of Western Balkans now participating in the EU accession process. Activities concentrated largely on the candidate countries next in line to join the EU.

In Croatia, the focus was on regional development whilst in Macedonia, key contributions were made in human resources development for SMEs. Wide-ranging projects were undertaken including economic policy development in Bosnia Herzegovina, motorway development in Albania, and SME development in Serbia.

Turkey's discussions with the European Union are operating over a lengthy time scale. ECORYS continues to be the 'public face' of the European Commission in Turkey, running its information and communication programme there and operating information centres in Istanbul and Ankara. Our activities also comprise organising and promoting seminars and workshops, and disseminating information through schools and newspapers throughout Turkey. Other projects have been carried out in the framework of pre-accession assistance. During 2006, substantial attention was given to the newly-established EU IPA (Instrument for Pre-Accession) training for the Turkish public administration. More recently ECORYS is working to develop programmes to give advice and training to women entrepreneurs throughout the country. In 2007, we launched the company ECORYS Turkey to respond not only to EU programmes but also to the national market. This company will operate in addition to our existing project office.

In 2006, we ran the 7th issue of the MTEC (Matra Training for European Co-operation) course in Rotterdam and in some of the accession countries. Through this, more than 50 participants followed intensive training in management of EU Structural Funds. Furthermore, ECORYS launched its 1st issue of specialised training in the EU Water Directive. Public Private Partnership has taken a special place in the transfer of knowledge and best practice in many of the countries in the EU enlargement area and ECORYS has played a role in supporting this.



1 Turkey – Training Government officials

In 2007, ECORYS experts delivered training and coaching in preparation for the Instrument for Pre-Accession (IPA) on behalf of the State Planning Organisation (SPO). The target group included government officials from various ministries, the SPO and other institutions responsible for EU Funds implementation in Turkey. The training covered preparation of the Strategic Coherence Framework (CSF) and Operational Programmes (OPs) and implementation for the sectors Competitiveness, Regional Development, Transport and Environment: the coaching focused on the preparation of the CSF and OPs. The participants were highly appreciative and shared their satisfaction during the certification ceremony. The CSF and OPs for IPA that Turkey drafted after these training and coaching activities are currently being discussed with the European Commission. The project resulted in several spin-offs between government bodies of Turkey and the Netherlands.

gerbrand.vanbork@ecorys.com

2 Bulgaria - Structural Funds

ECORYS supported Bulgaria in the process of preparing the National Strategic Reference Framework and Operational Programmes (OPs) for the Structural Funds. Based on our assessment of the administrative capacity of the institutes involved (the Ministry of Finance, which co-ordinates the Structural Funds, the Managing Authorities, and Intermediate bodies for the OPs), our experts provided concrete capacity building by training and coaching the staff of these institutes. At OP level, we assisted the Managing Authority of the OP Administrative Capacity both in building appropriate structures for implementation, and, importantly, in setting up correct working procedures. In addition to staff of the Managing Authority, potential beneficiaries also received training on all management aspects of the Structural Funds. A study tour to the Netherlands provided the staff of the Managing Authority with valuable information on how European Social Fund management runs in practice.

sacha.koppert@ecorys.com

3 Macedonia – HRDF Phase I

Enterprises must continually learn and adapt if they are to survive in a climate of global competitiveness. Businesses principally learn more from each other's 'good practice' than from experts or trainers. Creating the right conditions for such learning processes is a major challenge for government and business alike. This understanding lay behind the first phase of an ECORYS project in which a new institution has been created: the Human Resources Development Fund (HRDF). This public-private partnership aims to facilitate the learning processes of enterprises and their managers. Among the 45 founders are companies, professional associations, chambers, universities and the Ministry of Economy.

Other project activities included the provision of: training programmes for enterprises; an upgrading programme for local trainers; case studies of successful entrepreneurs and companies; and seminars for companies and universities. We also drafted the strategic plan, 5-year budget and the HRDF statute.

We are currently executing Phase III of this project.

www.hrdf.org.mk / julia.djarova@ecorys.com

4 Croatia - Regional development

Croatia is strengthening its national and local capacity for implementing programmes and projects aimed at the socio-economic revitalisation of its counties; particularly the war-affected regions. In 2003-2006, we successfully assisted the Croatian authorities in drafting a national strategy and legal framework for regional development, in setting up the institutional framework for this, and in stimulating partnerships and structured consultation. In 2005, we started a 32-month follow-up project focusing on 4 war-affected counties (Karlovac, Lika, Slavonski-Brod and Pozega). This work is primarily to help prepare projects for tendering under CARDS 2004 and other (donor) programmes. It also aims to build the development capacity of relevant national ministries and county administrations, (including Programme Management Units, intra- and inter-regional partnerships and other stakeholders in the region). In autumn 2007, we start a new follow-up project aiming at a further implementation of the Croatian national strategy for regional development.

sjaak.boeckhout@ecorys.com
ad.vandelft@ecorys.com

EU neighbourhood countries

ECORYS has a strong affiliation with the EU neighbourhood countries with a wide range of assignments carried out in the region over the last two decades.

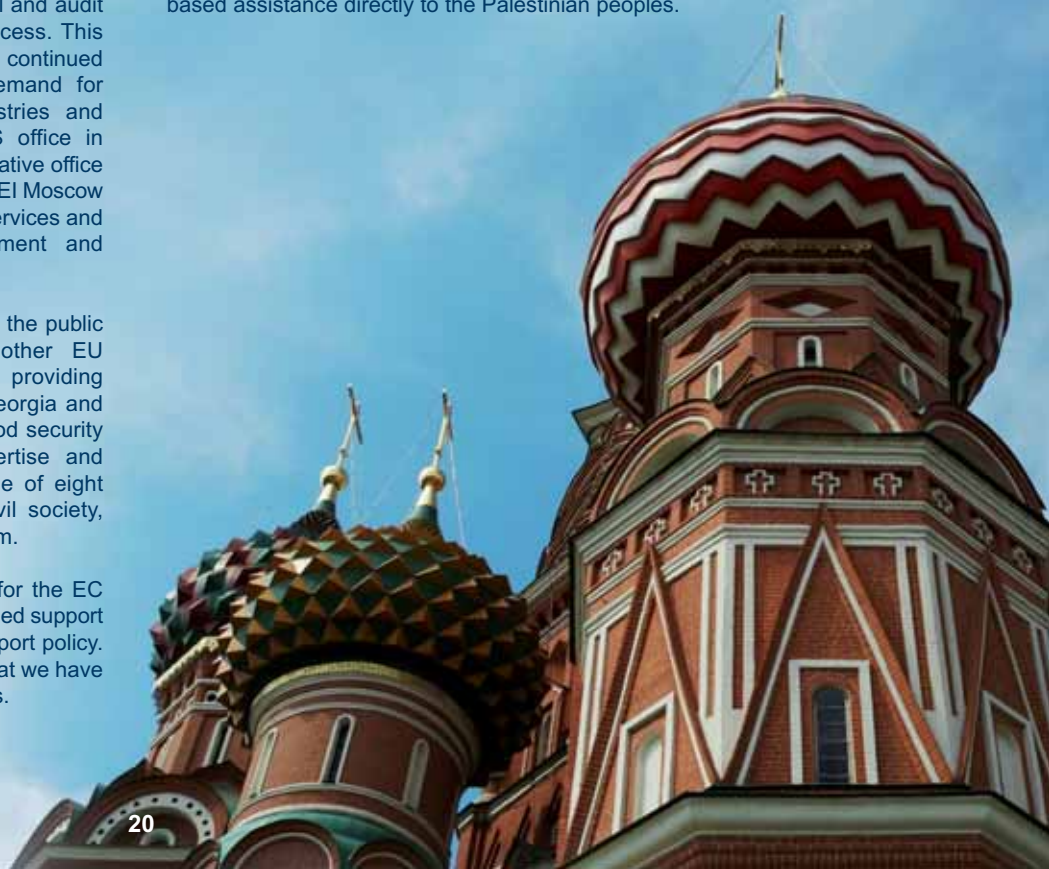
The close relationship with Russia, the largest of the neighbourhood countries, is exemplified by the ECORYS office in Moscow, which this year celebrated its 10-year anniversary.

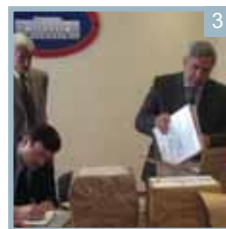
In recent years, ECORYS has been one of the major donor-funded consultants to the Russian Ministry of Finance, supporting the Ministry in budget reform and public finance management. In 2006, we managed the implementation of a multi-year reform, detailed a strategy for public finance management, and contributed to the capacity building of the Ministry. A new project in 2006 for the Ministry of Agriculture was indicative of Russia's reducing dependence on EuropeAid funds. In this project ECORYS is policy advisor to the Ministry of Agriculture and as such supports the introduction of internal control and audit systems as part of the budget reform process. This trend of less dependency on EU funds has continued and now there is a strong national demand for ECORYS' expertise from Federal Ministries and regional bodies. In 2006, the ECORYS office in Moscow was transformed from a representative office to a Group operating company. ECORYS-NEI Moscow provides its clients with a broad range of services and specialises in public finance management and evaluation.

ECORYS also has a long association with the public finance reform and management in other EU neighbourhood countries: for example, providing support to the Ministries of Finance in Georgia and Ukraine, and evaluating the agriculture food security programme in Moldova. In 2006, expertise and assistance was provided within the frame of eight projects in Georgia in fields such as civil society, transport and customs administration reform.

Agriculture-related work was carried out for the EC Delegation in Ukraine. In addition, we provided support for the design and implementation of transport policy. Such is the scope of our work in Ukraine that we have established an office in Kyiv in recent years.

Our association with neighbourhood countries looks south as well as east. We have been engaged in a range of projects in a number of the so-called "MEDA" countries, the EU's Mediterranean and Middle East partner countries. Various projects, particularly transport and port policies and strategies, were carried out in the Southern and Eastern Mediterranean under EU and bilateral development co-operation. For the Government of Spain we undertook one of the first ever assessments of their programmes in North Africa looking at the effectiveness of aid projects in Morocco. We have also been engaged in some of the more difficult areas of the Middle East. For example, very recently by providing expertise to the "Temporary International Mechanism" – an initiative of the the Quartet (EU, US, UN and Russia) to provide needs-based assistance directly to the Palestinian peoples.





1 Ukraine – Evaluation of IBPP

The Institution Building Partnership Programme (IBPP) in Ukraine supports an institution building process for a successful transition towards a market economy. This includes the reinforcement of democracy and civil society and the establishment of the rule of law through partnership/co-operation between organisations and authorities from EU member states and Eastern European or Central Asian countries. ECORYS was commissioned by the EC Delegation to Ukraine to evaluate the IBPP. The goals of the project were: to verify the implementation of the ongoing projects and to evaluate the impact and sustainability of the projects completed in 2001-2002. We were also requested to set out the lessons learnt from IBPP; to make recommendations for the future EU assistance to civil society development in Ukraine; and to develop an IBPP web-portal. During the project, the international team of experts interviewed representatives of the 29 project teams, public authorities, NGOs, target groups and beneficiaries. The main conclusions are that IBPP addresses real, current problems in Ukraine, that the projects are mostly successful, and that IBPP has strengthened civil society and social service delivery in Ukraine.

nick.vanderlijn@ecorys.com
volodymyr.pyzhov@ecorys.kiev.ua

2 Russia – Public expenditure management

At the EC's request, ECORYS supported the Russian Federation Ministry of Finance in managing the implementation of the multi-year results-oriented budget reform. This succeeded the earlier 'State budget reform' project, which was also led by ECORYS. This latter project contributed to the initiation of the reform and renovation of the budget planning process in Russia. The project team, whose composition was broadly the same during both assignments, formulated recommendations on various aspects of public finance. In addition, ECORYS prepared the strategy for further implementation of the budget reform in the framework of a fully-fledged programme for modernisation of public financial management. The most obvious results of both projects are greater credibility and reliability of budgetary decision making and established political accountability for expenditure outcomes. The former is confirmed by recent approval of the very first 3-year budget of Russia and the latter by regular Government discussions on the results achieved by the line ministries.

yastrebova@ecorys.ru

3 Albania – Large infrastructure project

The Government of Albania had decided to construct the Rreshen – Kalimash Motorway, a 50 km dual carriageway (including a tunnel), and to have it completed before June 2009. With an estimated cost of € 400–500 million, it is one of the country's biggest projects. In July 2006, ECORYS was requested to assess the economic impact of the scheme and to design a tender and contracting strategy in accordance with internationally accepted principles of fair and transparent competitive bidding procedures. In addition, we were asked to support the contract negotiations with the aim of reaching an agreement in September 2006 to allow speedy implementation. The objective was constrained by the absence of a detailed design for the works to be procured. Following an international call, four consortia expressed interest. The UK-based Bechtel-ENKA joint venture was selected by an independent international Evaluation Committee. After intense negotiations, a contract was agreed upon in September 2006. This allowed the contractor to mobilise quickly and meet the rapid timescale required in accordance with the objectives of the brief given to ECORYS. This was an unprecedented fast-track transaction for such a huge project, much to the satisfaction of the Albanian Government.

marcel.vandenbroek@ecorys.com

4 Occupied Palestinian Territories. – Donor Support

In 2006, circumstances in the Occupied Palestinian Territories deteriorated rapidly as a result of the new political situation. The availability of essential public services such as health care, drinking water and education came under pressure. To ensure that these would remain operational, the international Quartet (EU, US, UN and Russia) established the Temporary International Mechanism (TIM). The British Department for International Development, one of the donors, requested ECORYS to provide consultant support to TIM. During the first months of operation, we provided technical assistance in setting up a system for channeling international donor support. In addition, we were involved in the design and implementation of a scheme to pay social hardship allowances to vulnerable and poor Palestinians. Other activities included the provision of audit support and monitoring of the Mechanism's operations.

joris.endel@ecorys.com

Developing countries

For over half a century, ECORYS has been contributing to economic and social development in Asia, Africa, Latin America, the Caribbean and the Pacific.

In the 21st century, globalisation and persistent poverty have shifted the focus of development co-operation towards poverty reduction in the context of the Millennium Development Goals. At the same time, the Paris Declaration on Aid Effectiveness is having a profound impact on donor aid organisation and co-ordination. As a result, the nature and scope of ECORYS' work has changed considerably.

Moreover, the volume of our work has steadily increased with worldwide EU framework contracts ranging from macro-economics, public finance, support to industry and commerce, to education, employment, health care, as well as monitoring and evaluation. In addition, ECORYS is providing Public Finance Management (PFM) consulting services to SIDA (the Swedish International Development Cooperation Agency) and economic advisory services to the UK Department for International Development (DFID) (Economist Resource Centre) under bilateral donor framework contracts.

We are increasingly involved in programme preparation and capacity- and institution-building. In the sphere of aid effectiveness evaluation our staff have participated in the large DFID-funded multi-donor evaluation of general budget support and various EC country strategy evaluations.

Several important assignments in Africa have recently been implemented. Perhaps the most high-profile project over the past year was the monitoring of the Nigerian census. In addition, in 2007 two large EC projects have started - one dealing with agro-sector studies for countries in the SADC (Southern African Development Community) region and a project that is contributing to Kenya's economic integration into the world economy.

ECORYS also has a long track record in advising on transport policies and strategies in many African and Asian countries, such as the integrated development and reconstruction of road networks and ports, as well as integrated coastal zone management. Recent noteworthy projects include port reconstruction in Aceh, Indonesia, infrastructure projects in the Philippines and in the Maldives (in the aftermath of the 2004 tsunami).

We are continuing our support to Dutch embassies in all partner countries in the area of PFM under the large capacity building and training project of the Dutch Ministry of Foreign Affairs. Other bilateral donors (Ireland, Denmark, Finland and Austria) have also contracted us to provide PFM training to their staff. Since early 2007, governance and anti-corruption assessments are being conducted in 35 countries under the Dutch Strategic Governance Assessment project.

We are co-operating with an increasing number of local firms and experts who are becoming more and more involved in the implementation and delivery of projects and programmes across Africa, Asia and other parts of the world.

In 2006, we established an International Development Division in London. The objectives of this unit are to service new markets – both in terms of competence areas (public administration, taxation and customs) and clients.





1 Africa, Nicaragua, Vietnam - Budget Support

ECORYS was a member of the consortium that carried out a joint evaluation on behalf of more than 30 donor and partner countries. The study was commissioned by a consortium of aid agencies chaired by the UK Department for International Development (DFID) and initiated and supported by the OECD's Development Assistance Committee's Evaluation Network. This joint evaluation, the first of its kind, looked at the use and effectiveness of general budget support, by drawing on the experience of seven countries (Burkina Faso, Malawi, Mozambique, Nicaragua, Rwanda, Uganda and Vietnam) over a ten-year period (1994-2004).

The study focused on the effects of general budget support on poverty reduction, and more specifically how it affects ownership and accountability. Furthermore the study provided evidence, best practice lessons and recommendations on when and how general budget support should be used and how its risks can be managed.

albert.degroot@ecorys.com

2 Worldwide – Governance Assessments

ECORYS supports the preparation of strategic governance assessments in 35 Dutch partner countries. Experts of ECORYS, ODI (UK) and MI (Denmark) work jointly with Dutch embassy staff to gain a better understanding of the underlying political economy issues that shape the structure and culture of governance in the partner countries. Underpinning the programme is a recognition that governance is shaped by a unique set of formal and informal institutions that need to be taken into account by donors when formulating its interventions.

Activities in each partner country include the drafting of a 'Power and Change Analysis' (PCA). This document analyses the governance situation in terms of foundational (long-term) factors, the medium-term 'rules of the game' as well as the short-term 'here and now'. The PCA is discussed in workshops with embassy staff, other donors and local stakeholders. In addition we support the embassies in designing an effective approach to strengthening governance and anti-corruption in the partner country. The results of the programme will be incorporated into the 2009 – 2012 Multi-Annual Strategic Plans (MoFA, 2007-2009).

anneke.slob@ecorys.com

3 Nigeria – Monitoring the Population Census

In 2006, Nigeria implemented a nation-wide population and housing census – a logistical challenge of extraordinary proportions with a total cost of about € 250 million and 600,000 persons involved. With Nigeria having a history of inaccuracy and manipulation of census results, the success of the census was not only essential for the Nigerian authorities, but also for the European Commission, which contributed € 116.5 million to the census budget. The EC charged ECORYS to be an independent source of documentation, analysis and reporting on the census process and to offer advice to stakeholders encountering challenges in the field. ECORYS deployed 90 monitors from 25 countries to 35 of the 37 Nigerian states. They observed activities and offered support to government offices as well as to enumerators. Inter alia three field surveys were conducted and a number of technical studies were made on key aspects of the census process, including procurement, supply of materials and payment of census workers. In our final report to the Government and UNDP we made the judgement that the census process – though not problem-free – offered a good basis for generating comprehensive reliable and credible results.

joris.endel@ecorys.com

4 Kenya – KEPLOTRADE Programme Phase II

In 2007, the European Commission contracted ECORYS to implement the KEPLOTRADE Programme Phase II in Kenya over the period 2007 to 2009. The overall objective of this programme is to support Kenya in the timely establishment and effective implementation of an Economic Partnership Agreement (EPA) with the EU. This programme will further develop the decision-making capacity of relevant Kenyan stakeholders on trade relations with regional and multilateral trade arrangements. It will also support the Kenyan Government in the EPA negotiations with the EU and in achieving increased and deepened regional trade and integration. For the implementation of this programme ECORYS will draw upon the wide expertise that exists in the company and focus on institution and capacity building, research and policy advice. Specific activities include trade policy analysis and advice, training needs assessments and technical feasibility studies, but also training, awareness-raising and stimulating a civil society dialogue on trade issues.

paul.wijmenga@ecorys.com

Our people



Gerbrand van Bork
Co-ordinator Regional Development
Team / Manager Business Development
Rotterdam and Ankara

Since I started working for ECORYS in 2000, I have been engaged in a wide variety of projects in the Netherlands and abroad. At the moment, my work for the Netherlands and Balkan markets focuses on acquisition, business development and project management. This means writing creative proposals, developing new products and research methods, but also performing cost-benefit analyses and impact studies, working in teams of EU Funds experts on evaluations and institutional building projects, and on-the-job coaching and training.

Since March 2007, I have been enjoying living and working in Turkey, where I have been assisting the ECORYS Turkey director in establishing our Ankara office. I am also committed to setting up a network and database with Turkish local experts, clients, partner companies and to developing new products. Furthermore, I train Turkish officials in the Instrument of Pre-Accession (IPA) preparation and implementation. All in all, never a dull moment!

“Bringing people and knowledge together is very important for a consulting company like ECORYS and is a very rewarding thing to do.”



Sonia Vega Vega

Senior Research Manager / Senior Consultant

Madrid

What do I like most about my job? That ECOTEC and ECORYS staff are an incredibly valuable source of knowledge and experience. Furthermore, the working environment and the good teamwork make being a part of the ECORYS Group a really enjoyable experience, even in tense and difficult moments. As well as interesting colleagues, from whom I can learn a great deal, the Group offers a good balance of personal development and career progression. What I actually look ahead to is really interesting work for leading organisations in the practice areas where I wish to develop my career and, at the same time, the opportunity to develop managerial skills.

Every project represents both an opportunity and a challenge: an opportunity to learn more and grow both professionally and personally, to work with other people in the Group and to develop your expertise and client base in key business areas. But also a challenge, as it is a new test on your knowledge, your skills, your project managerial capacities and your creativity. Working as a Senior Research Manager at ECOTEC España offers me a challenging opportunity to both develop project management in key practice areas and office management skills and experience. All this combined makes ECORYS the Company for me

“I believe one of the Group’s greatest features is the large diversity of people who work here and the range of their expertise and experience.”

Knowledge areas and service areas



ECORYS has developed specialist, in-depth expertise covering a wide range of economic and social science issues which we can apply to the full range of the policy cycle for the most effective impact. We draw on this expertise in an integrated way. Our practice is to establish a team of experts that brings complementary perspectives from a number of professional and disciplinary backgrounds depending upon the nature of the project or assignment. Where the nature of the task requires additional expertise that is not available 'in-house', we work with organisations of the highest repute and competences. We pride ourselves in producing solutions which are 'customised' and robust. Our staff are committed to delivering a service which leads to measurable results for clients in the following four main knowledge areas:

Economy and Competitiveness

Enhancing the competitiveness of countries, regions and businesses lies at the heart of the economic development strategies of many of the societies in which we work. At the same time, internationalisation and globalisation are impacting upon countries and regions, whilst also posing challenges to trade relations, development co-operation and, more broadly, to sustainable development. Fields in which ECORYS has ample expertise vary from innovation, competitiveness and competition policy to industry and trade, public finance management and the economics of water and energy management.

Regions, Cities and Real Estate

Economies and societies exist in a spatial context which affects the way they develop, the role they play in national economic growth and the distribution of economic and social conditions within them. Some areas are 'engines of growth', others suffer from growth pressures, whilst yet others face the effects of lack of competitiveness or obsolescence and the need to change. Our understanding of regional

development (whether urban or rural), urban growth and regeneration and of the role of real estate development in economic and social development enables us to respond to these ever-changing challenges.

Transport, Mobility and Infrastructure

Movement and communication in contemporary society have become increasingly complex. Demand is more diverse and the infrastructure is in a state of flux. Integration, privatisation, deregulation and pricing are all affecting our understanding of and our capacity to plan for these changes in communications. ECORYS offers the knowledge and the means for well-founded decisions with respect to communications, transport, infrastructure, logistics and network sectors.

Social Policy and Governance

Economic, social and technological change each bring their own pressures to bear upon society. Hence measures are needed to balance conflicting social pressures and economic demands within an efficient and socially fair framework. Such concerns span the domains of education and training, labour markets, equal opportunities, social inclusion, industrial relations and social dialogue, justice and home affairs, social protection and the social economy. The effectiveness of different governance structures and the capacity of those who work in them are critical elements in successful social and economic development. In all of these areas ECORYS has an extensive track record and many years of experience.

What we offer

ECORYS offers the application of its knowledge and expertise at all stages of the policy and strategy cycle. Our clients may require help with developing or assessing policy or strategy. Increasingly they are requesting support in the implementation and delivery of solutions. Some clients ask us to take on the whole process of managing or delivering their programmes. For others we provide support through training, working alongside clients or finding ways to access additional finance or partners for implementation.

ECORYS knowledge areas

Economy and Competitiveness

- Macro-economics and public finance
- Competition and regulation
- Development co-operation
- Agriculture
- Industry, trade and export
- Knowledge society
- Environment and natural resources

Regions, Cities and Real Estate

- Regional development
- Real estate and location development
- Housing co-operatives and associations
- Regeneration and renewal

Transport, Mobility and infrastructure

- Transport, mobility and infrastructure
- Network sectors

Social Policy and Governance

- Social Policy, employment and income
- Education
- Health care
- Safety
- Governance

ECORYS service areas

Research and Policy Advice

- Research
- Policy and strategy formulation
- Feasibility studies

Institution Building and Capacity Development

- Consulting
- Institution Building and Capacity Development
- Delivering organisational change
- Knowledge mobilisation, transfer and training

Programme Management and Implementation

- Managing programmes
- Process and interim management
- Project delivery / implementation
- Procurement and legal advice
- Training

Communication and Financing

- Communication
- Financing

Monitoring and Evaluation

- Monitoring and auditing
- Evaluation



The ECORYS Research Programme

The pre-eminent objective of the ECORYS Research Programme is to deliver research results of quality, with the other major objective being the development of products and a knowledge base which will strengthen the company's competitive position. It is designed to underpin the intellectual capital of the company: to enable us to explore emerging issues in depth and to develop new ideas, approaches and methodologies.

It provides opportunities for staff to undertake quality research, to work with others from across the company and also with academics and other specialists who join the programme from outside institutions. An important effect of the programme is to strengthen our research network and our links with universities, other research programmes and top-level researchers.

The programme is funded by ECORYS from its own resources and also receives significant support from the Netherlands Economic Institute (NEI) Foundation. In addition, some projects are also part funded from external research funds and clients who have a special interest in particular topics.

The themes for the programme are identified by ECORYS. Individual project proposals are submitted and selected by a research committee with representation from ECORYS, the NEI Foundation and independent advisors. Proposals are also 'peer reviewed' by external academics or specialists to ensure their quality.

Current research projects

Housing Restructuring and Neighbourhood Renewal

Housing restructuring and neighbourhood renewal approaches in Europe – and 5 detailed case studies.

Facing the Impact of Migration in the EU

Understanding the impact of migration in Europe – key policy issues and responses in 5 countries.

Integrating Quality of Life Measurements into Social Cost-Benefit Analysis (SCBA)

Broaden cost-benefit analysis studies to fields beyond infrastructure and real estate, such as social and environmental policies and city development policies.

Innovation in European Evaluation Methodologies

To increase the collective knowledge, understanding and skills set regarding evaluations within the ECORYS Group and to look at the development of methodologies.

Quality of Life Measurement – a Russian Case Study

To create a research/policy formulation tool that would help to use the existing international indicators to measure the status and evolution of the quality of governance, economic environment and civil society.

Barriers to Sustainable Growth in Developing Countries: Tax Policy

Consequences for the tax system of regional/international integration including identification of best practice in the field of excise duty, and how best practices could be integrated in existing tax systems.

City Living

This comparative study develops the growing policy debate around the effectiveness of city centre living in facilitating sustainable urban renaissance.

Competition in the Postal Sector

The objective of the study is to analyse to what extent the regulatory framework in EU countries influences the business models of competitor postal companies that have entered or are likely to enter the market.

Rural Sustainability

The research project examines the UK policy landscape as it is currently evolving to identify inconsistencies in approach towards achieving the twin governmental goals of addressing climate change and creating sustainable rural communities.

HR goals and HR policy

560
highly qualified staff

21
permanent offices

11
countries

Our people are fundamental to the work we do. They are highly qualified and experienced in a wide range of disciplines and policy areas, from social welfare to transport, economic development to education, housing to environment. We look for colleagues who share a passion and enthusiasm for the work we do, endorse our vision and strategy, and most importantly, feel good about being a part of the company.

We pride ourselves on being an integrated company, so whatever the project, we can always draw on the ideas and inspiration of others, enabling creative colleagues to work with one another and shine and be as flexible as is required by our clients. We are proud of our diversity in nationalities and cultural backgrounds.

Therefore it is important for us to provide an environment where employees can develop and grow, become the experts they aspire to be, whilst maintaining a positive work-life balance. We are also keen to bring in highly skilled professionals and are in the eighth year of the successful International Trainee Programme, creating a new generation of 'Ecorians', who are literally and metaphorically crossing borders within the company and within Europe.

ECORYS staff breakdown

Staff in numbers at the end of 2006 Total: 560

Companies and offices outside the Netherlands and UK: 109

staff in the Netherlands: 231

staff in the UK: 220



Part-time & Full-time staff

Part time: 24.5%

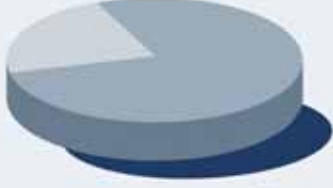
Full time: 75.5%



Number of staff by educational level

Senior Secondary vocational education: 17.5%

Higher professional University education: 82.5%



ECORYS office locations

1: UK

Birmingham, London
Manchester, Leeds
Newcastle-under-Lyme, Cardiff

2: Netherlands

Rotterdam, Amsterdam

3: Belgium

Brussels

4: Spain

Madrid

5: Czech Republic

Prague

6: Poland

Warsaw

7: Hungary

Budapest

8: Bulgaria

Sofia

9: Ukraine

Kyiv

10: Turkey

Ankara

11: Russian Federation

Moscow



Our people



Paul Jeffrey
ECOTEC
Divisional Managing Director
Birmingham

I was one of the first people to join ECOTEC when it was founded in 1983. Over the past 24 years I have helped to build the company from those early beginnings; and at the same time my own career has grown. From that start as a Research Assistant I have been able to develop and apply my managerial skills. As a result I have been a Director of ECOTEC for many years and a member of the Group Management Team since ECORYS was founded in 2000. This means that I have worked with many people across the company; the friendliness, good humour and the knowledge of my colleagues never fails to impress. Over the years, I have been lucky enough to lead teams and projects on a wide range of topics. This has given me a great variety of interest; from economic development and planning in regions throughout the UK, to running projects on regional and urban development for the European Commission in cities throughout the EU. I have now taken on the challenge of setting up a new Housing Division in ECOTEC to deal with one of the key UK policy issues of the future.

“The friendliness, good humour and the knowledge of my colleagues never fails to impress – something that has not changed over all the years of my career here.”



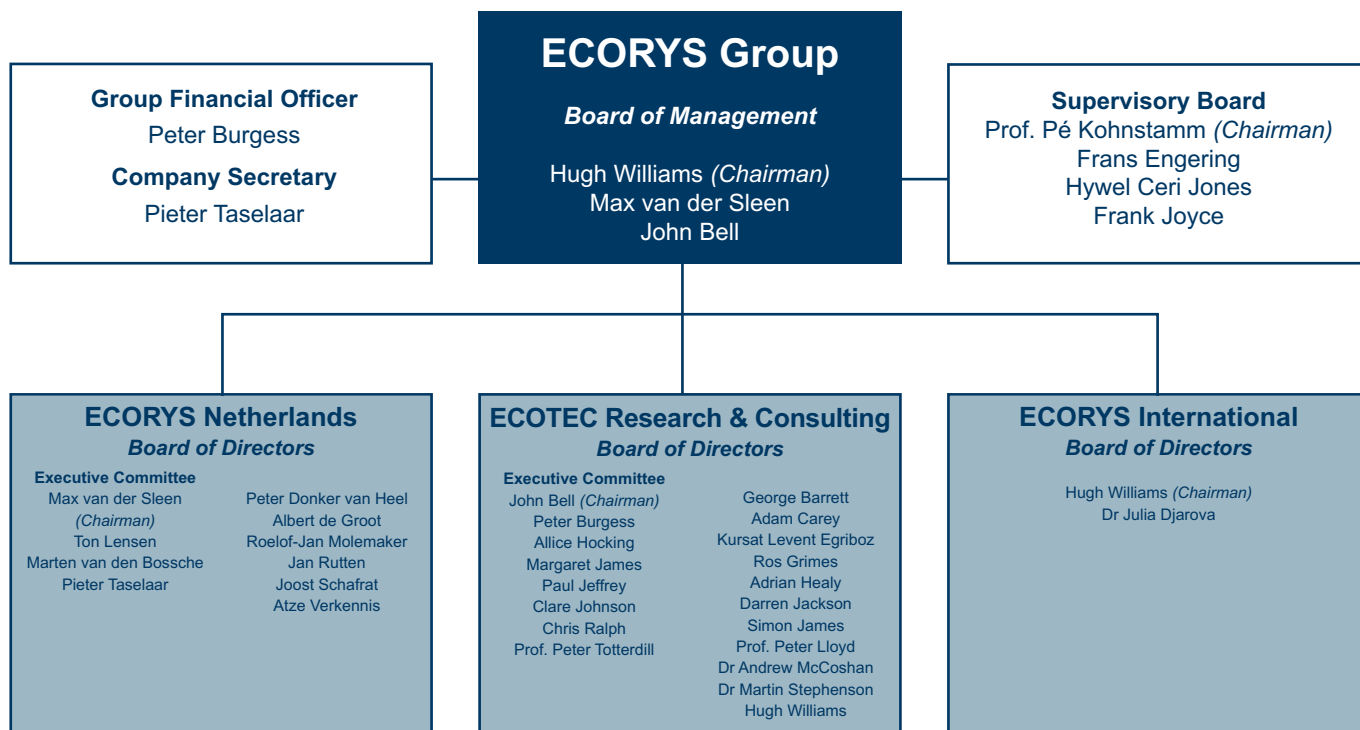
Nienke Uil
Consultant
Rotterdam

I have always wanted to do work that mattered. ECORYS Finance, the team I am part of, has carried out many projects in institutional development for Public-Private Partnerships (PPP) in quite a number of countries. Therefore we are able to export the knowledge obtained in one country to the other. In this sense, I have brought both people and knowledge together and intend to continue doing so.

I have been working for ECORYS for almost 3 years now and have been able to travel to different countries for a number of really interesting assignments. The project that had a great impact on me in 2006 was the monitoring of the housing and population census in Nigeria. The contents of the assignment did not have much to do with my division's regular fields of expertise, but as the ECORYS temporary office manager in the capital of Nigeria, I did get the chance to develop and use the skills that I use on a daily basis as a project coordinator. Being encouraged and supported to work every now and then on subjects other than one's division's core business, provides the flexibility of being able to work on projects that appeal to you personally, as well as working closely with colleagues from other divisions. This flexibility is one of the reasons that makes ECORYS such an attractive employer for me.

“When I chose my university study, I could only hope for a future job like my current one, where I can use my skills and knowledge to help other countries in their development.”

Organisation and management as of October 2007



Group Management Team
 Wim Van der Beken, John Bell, Marten van den Bossche, Peter Burgess, Dr Julia Djarova, Peter Donker van Heel, Albert de Groot, Margaret James, Paul Jeffrey, Clare Johnson, Ton Lensen, Nick van der Lijn, Prof. Peter Totterdill, Roelof-Jan Molemaker, Chris Ralph, Jan Rutten, Max van der Sleen, Pieter Taselaar, Atze Verkennis, Hugh Williams, Dr Olga Yastrebova

Market Director EU 27
 Jan Maarten de Vet

Market Director for EU Enlargement
 Dr Julia Djarova

Market Director Developing Countries
 Albert de Groot

Director ECORYS Research Programme
 George Barrett

Methodology Director - Evaluation
 Anneke Slob

ECORYS Netherlands

Finance

Marcel van den Broek

Labour & Social Policy

Peter Donker van Heel

Ruud van der Aa, Boukje Cuelenaere, Marjolein Peters

Macro & Sector Policies

Albert de Groot, Dr Nick van der Lijn

Leo Beumer, Arthur ten Have, Ferry Philippen,

Dr Bjørn Volkerink, Paul Wijmenga

Real Estate

Nico Harkes,

Peter Beerlage, Damo Holt,

Christine Oude Veldhuis

Region, Strategy & Entrepreneurship

Atze Verkennis,

Gerlof Rienstra

Transport

Roelof-Jan Molemaker,

Dr Adnan Rahman, Wim Spit

ECORYS-AVM Amsterdam Traffic & Mobility Management

Joost Schaftrat, Rob Jeuring, Marco Martens

ECORYS-Rutten Amsterdam Communication Advice

Jan Rutten

Michel Bührs

ECOTEC Research & Consulting

Housing

Paul Jeffrey, Adam Carey

International Development

Darren Jackson

Regeneration and Economic Development

Clare Johnson, Chris Ralph, George Barrett,

Adrian Healy

Social Policy - Europe

Prof. Peter Totterdill, Prof. Peter Lloyd,

Dr Andrew McCoshan,

Social Policy - UK

Alice Hocking, Simon James

Survey

Ros Grimes

Technical Assistance

Margaret James, Kursat Levent Egriboz,

Dr Martin Stephenson

ECOTEC Birmingham

John Bell

ECOTEC Leeds

Clare Johnson

ECOTEC London

John Bell

ECOTEC Manchester

Chris Simpson

ECOTEC Cardiff

Angela Elniff-Larsen

ECOTEC Brussels, Belgium

Jan Maarten de Vet

ECOTEC España

Nicoletta del Bufalo

ECOTEC R&C Anatolia, Turkey

Kursat Levent Egriboz

ECORYS International

ECORYS Brussels, Belgium

Jan Maarten de Vet

ECORYS Magyarország, Hungary

Péter Gauder, Bernadett Bedöcs

ECORYS-NEI, Russian Federation

Dr Olga Yastrebova

ECORYS Polska

Radoslaw Piontek

ECORYS South East Europe, Bulgaria

Lazar Bazlyankov

ECORYS, Turkey

Berk Babila

ECORYS Ukraine

Dr. Vladimir Pyzhov

IDEA Consult, Belgium

Wim Van der Beken

Kolpron CZ, Czech Republic

Jan Sůchy

Kolpron Praha, Czech Republic

Petr Starčević

ECORYS Representatives / Liaison Officers:

Denis van Dam, Zagreb, Croatia

Dušan Jevtic, Belgrade, Serbia

Rafaelita Nuñez, Manila, Philippines

Etienne d'Otreppe, Washington, USA

Address list *as of October 2007*

ECORYS Holding BV

Watermanweg 44
3067 GG Rotterdam
P.O. Box 4061
3006 AB Rotterdam
The Netherlands
T +31 10 453 86 76
F +31 10 453 87 55
E info@ecorys.com
W www.ecorys.com

ECORYS Netherlands

Watermanweg 44
3067 GG Rotterdam
P.O. Box 4175
3006 AD Rotterdam
The Netherlands
T +31 10 453 88 00
F +31 10 453 07 68
E netherlands@ecorys.com
W www.ecorys.nl

ECORYS Finance

T +31 10 453 87 73
F +31 10 453 87 52
E finance@ecorys.com

ECORYS Labour & Social Policy

T +31 10 453 88 05
F +31 10 453 88 34
E lsp@ecorys.com

ECORYS Macro & Sector Policies

T +31 10 453 87 62
F +31 10 452 36 60
E msbsecr@ecorys.com

ECORYS Real Estate

T +31 10 453 85 18
F +31 10 453 85 88
E vgsecr@ecorys.com

ECORYS Region, Strategy & Entrepreneurship

T +31 10 453 87 99
F +31 10 453 86 50
E rsosecr@ecorys.com

ECORYS Transport

T +31 10 453 88 50
F +31 10 452 36 80
E transport@ecorys.com

ECORYS-AVM

Traffic & Mobility Management

Rhijnspoorplein 28
1018 TX Amsterdam
The Netherlands
T +31 20 638 97 56
F +31 20 638 98 36
E avm@ecorys.com
W www.avm.ecorys.nl

ECORYS-Rutten

Communication Advice

Oudezijds Achterburgwal 141-k
1012 DG Amsterdam
The Netherlands
T +31 20 626 93 53
F +31 20 623 9 368
E info@rutten.net
W www.rutten.net

ECOTEC Research & Consulting

Priestley House
12-26 Albert Street
Birmingham B4 7UD
United Kingdom
T +44 121 616 36 00
F +44 121 616 36 99
E birmingham@ecotec.com
W www.ecotec.com

ECOTEC Housing

T +44 121 616 36 12
F +44 121 616 36 99
E fozia.sultana@ecotec.com

ECOTEC International Development

T +44 207 921 38 00
F +44 207 921 38 99
E darren.jackson@ecotec.com

ECOTEC Regeneration & Economic Development

T +44 121 616 36 06
F +44 121 616 36 99
E red@ecotec.com

ECOTEC Social Policy

T +44 121 616 37 06
F +44 121 616 36 99
E spd@ecotec.com

ECOTEC Survey

ECOTEC Newcastle-under-Lyme
1 Nelson Place
Newcastle-under-Lyme
Staffordshire ST5 1EA
T +44 178 261 21 22
F +44 178 261 16 68
E survey@ecotec.com

ECOTEC Technical Assistance

T +44 121 616 37 84
F +44 121 616 36 99
E tad@ecotec.com

ECORYS International BV

ECOTEC Cardiff

6th Floor
Friary House
Greyfriars Place
Cardiff CF10 3AE
United Kingdom
T +44 29 2036 77 70
F +44 29 2036 77 89
E cardiff@ecotec.com

ECOTEC Leeds

31-32 Park Row
Leeds LS1 5JD
United Kingdom
T +44 113 290 41 00
F +44 113 290 41 19
E leeds@ecotec.com

ECOTEC London

Rose Court
2 Southwark Bridge
London SE1 9HS
T +44 845 630 86 33
F +44 845 630 87 11
E london@ecotec.com

ECOTEC Manchester

Tower Business Centre
Portland Tower
Portland Street
Manchester M1 3LF
T +44 161 238 49 65
F +44 161 238 49 66
E manchester@ecotec.com

ECOTEC Brussels

13a Avenue de Tervuren
B-1040 Brussels
Belgium
T +32 2 743 89 49
F +32 2 732 71 11
E brussels@ecotec.com

ECOTEC España

Orense, 25-Esc. Dcha. 3B
28020 Madrid
Spain
T +34 91 598 08 51
F +34 91 556 34 66
E madrid@ecotec.com

ECOTEC Anatolia

Turgutlu Sok No: 50/10
GOP Ankara 06700
Turkey
T +90 312 459 79 00
F +90 312 447 14 79
E ankara@ecotec.com

Watermanweg 44
3067 GG Rotterdam
P.O. Box 4175
3006 AD Rotterdam
The Netherlands
T +31 10 453 86 76
F +31 10 453 87 55
E info@ecorys.com
W www.ecorys.nl

ECORYS Brussels

13a Avenue de Tervuren
B-1040 Brussels
Belgium
T +32 2 743 89 49
F +32 2 732 71 11
E brussels@ecorys.com

ECORYS Magyarország Kft.

Kemenes utca 6
H-1114 Budapest
Hungary
T +36 1 266 24 82 / 266 38 09
F +36 1 317 23 93
E info@ecorys.hu
W www.ecorys.hu

ECORYS-NEI

Profsoyuznaya st., 23
117 997 Moscow
Russian Federation
T +7 495 411 62 08
F +7 495 411 62 09
E moscow@ecorys.ru /
ecorys@ecorys.ru
W www.ecorys.ru

ECORYS Polska Sp. z o.o.

Ul. Raclawicka 146
02-117 Warsaw
Poland
T +48 22 339 36 40
F +48 22 339 36 49
E ecorys@ecorys.pl
W www.ecorys.pl

ECORYS South East Europe

42 Parchevich Str. fl. 9
1000 Sofia
Bulgaria
T +359 2 981 60 32
F +359 2 981 60 32
E ecoryssee@ecorys.com

ECORYS

Büklüm Sk. No: 63/73
Kavaklıdere 06680 Ankara
Turkey
T +90 312 428 20 60
F +90 312 428 20 70
E turkey@ecorys.com

ECORYS Ukraine

Gorkogo Str. 102
Office 23 (5th Floor)
03150 Kyiv
Ukraine
T +380 44 528 00 52
F +380 44 528 00 52
E ecorys_kyiv@voliacable.com

IDEA Consult NV

Kunstlaan 1-2, bus 16
1210 Brussels
Belgium
T +32 2 282 17 10
F +32 2 282 17 15
E info@ideaconsult.be
W www.ideaconsult.be

Kolpron CZ s.r.o.

Sluneční náměstí 2
158 00 Prague 5
Czech Republic
T +420 2 5161 1583 / 84
E kolpron@iol.cz

Kolpron Praha s.r.o

Janackovo nabreží 57
150 00 Prague
Czech Republic
T +420 2 516 125 49
E office@kolpron.cz
W www.kolpron.cz



Working across the World



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ECORYS Holding BV
Department of Marketing & Communication

Watermanweg 44
3067 GG Rotterdam
P.O. Box 4061
3006 AB Rotterdam
The Netherlands
T +31 10 453 86 76
F +31 10 453 87 55
E info@ecorys.com
W www.ecorys.com

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