ECC General Session: Audience Response

The PULSE of the Industry

Moderators:

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QUESTION 1:

I am a:

1. Contractor 53%
2. Owner 26%
3. Supplier 13%
4. Academic 1%
5. Other 7%
I primarily belong to, or serve, the following industry segment:

1. Power - 6%
2. Chemicals - 21%
3. Hydrocarbons - 61%
4. Pharmaceuticals - 4%
5. Mining/Metals - 1%
6. Other - 7%
QUESTION 3:
Consider the nature and extent of the Owner/Contractor/Subcontractor challenges encountered in the Panama Canal and Brooklyn Bridge projects. How could we compare that with today?

1. The challenges were much more significant then 23%
2. The challenges were a little more significant then 15%
3. No different from today 36%
4. Today’s challenges are a little more significant 14%
5. Today’s challenges are much more significant 12%
QUESTION 3: By Business

1. The challenges were much more significant then

2. The challenges were a little more significant then

3. No different from today

4. Today’s challenges are a little more significant

5. Today’s challenges are much more significant

Contractor
Owner
Supplier
Academic
Other

QUESTION 3: By Business

Contractor
Owner
Supplier
Academic
Other

Redefining Our Industry
Solutions through Collaboration, Innovation and Organization
QUESTION 4:

Consider projects today that carry the equivalent level of size, complexity and risk to the Brooklyn Bridge and Panama Canal. What would be the best way to allocate risk today?”

1. All risk on Contractor 2%
2. More risk on Contractor 5%
3. Share risks equally 52%
4. More risk on Owner 34%
5. All risk on Owner 7%
QUESTION 4: By Business

1. All risk on Contractor
   - Contractor: 20%
   - Owner: 61%
   - Supplier: 22%
   - Academic: 21%
   - Other: 8%

2. More risk on Contractor
   - Contractor: 26%
   - Owner: 21%
   - Supplier: 22%
   - Academic: 12%
   - Other: 4%

3. Share risks equally
   - Contractor: 80%
   - Owner: 80%
   - Supplier: 61%
   - Academic: 57%
   - Other: 9%

4. More risk on Owner
   - Contractor: 45%
   - Owner: 8%
   - Supplier: 22%
   - Academic: 5%
   - Other: 4%

5. All risk on Owner
   - Contractor: 1%
   - Owner: 4%
   - Supplier: 5%
   - Academic: 0%
   - Other: 4%
QUESTION 5:
In my industry segment, the Owner Capital budgets are:

1. Being cut back
   - 2%

2. Still moving forward but being pushed out
   - 39%

3. Moving forward as planned
   - 13%

4. Being increased to account for extra cost and schedule needs
   - 32%

5. Budgets increasing beyond that needed to cover escalation only (i.e. real growth)
   - 14%
QUESTION 5: By Industry Segment

1. Being cut back
- Power: 0%
- Chemicals: 3%
- Hydrocarbons: 0%
- Pharmaceuticals: 0%
- Mining/Metals: 0%
- Other: 29%

2. Still moving forward but being pushed out
- Power: 1%
- Chemicals: 13%
- Hydrocarbons: 30%
- Pharmaceuticals: 33%
- Mining/Metals: 40%
- Other: 29%

3. Moving forward as planned
- Power: 13%
- Chemicals: 10%
- Hydrocarbons: 10%
- Pharmaceuticals: 29%
- Mining/Metals: 33%
- Other: 30%

4. Being increased to account for extra cost and schedule needs
- Power: 19%
- Chemicals: 21%
- Hydrocarbons: 30%
- Pharmaceuticals: 30%
- Mining/Metals: 19%
- Other: 14%

5. Budgets increasing beyond that needed to cover escalation only (i.e. real growth)
- Power: 0%
- Chemicals: 7%
- Hydrocarbons: 13%
- Pharmaceuticals: 29%
- Mining/Metals: 14%
- Other: 10%
## QUESTION 6:

Who will be the next President of the United States?

1. Hillary Clinton - 27%
2. Fred Thompson - 12%
3. John Edwards - 5%
4. Mitt Romney - 10%
5. Barack Obama - 8%
6. Rudy Giuliani - 25%
7. Someone Else - 13%
QUESTION 6: By Business

1. Hillary Clinton
2. Fred Thompson
3. John Edwards
4. Mitt Romney
5. Barack Obama
6. Rudy Giuliani
7. Someone Else

- Contractor
- Owner
- Supplier
- Academic
- Other
QUESTION 6: By Industry Segment

1. Hillary Clinton
   - Power: 20%
   - Chemicals: 21%
   - Hydrocarbons: 29%
   - Pharmaceuticals: 51%
   - Mining/Metals: 0%
   - Other: 0%

2. Fred Thompson
   - Power: 22%
   - Chemicals: 11%
   - Hydrocarbons: 30%
   - Pharmaceuticals: 17%
   - Mining/Metals: 0%
   - Other: 0%

3. John Edwards
   - Power: 5%
   - Chemicals: 9%
   - Hydrocarbons: 0%
   - Pharmaceuticals: 0%
   - Mining/Metals: 0%
   - Other: 0%

4. Mitt Romney
   - Power: 10%
   - Chemicals: 9%
   - Hydrocarbons: 14%
   - Pharmaceuticals: 33%
   - Mining/Metals: 0%
   - Other: 0%

5. Barack Obama
   - Power: 4%
   - Chemicals: 8%
   - Hydrocarbons: 20%
   - Pharmaceuticals: 7%
   - Mining/Metals: 0%
   - Other: 0%

6. Rudy Giuliani
   - Power: 20%
   - Chemicals: 26%
   - Hydrocarbons: 21%
   - Pharmaceuticals: 26%
   - Mining/Metals: 0%
   - Other: 0%

7. Someone Else
   - Power: 9%
   - Chemicals: 14%
   - Hydrocarbons: 21%
   - Pharmaceuticals: 22%
   - Mining/Metals: 0%
   - Other: 0%
QUESTION 7:

What are your “Top 3” most critical issues in getting projects successfully completed today?” (Vote for 3)

1. Engineering resource availability 34%
2. Material cost and delivery requirements 28%
3. Construction resources availability 28%
4. Regulatory and permitting challenges 5%
5. Availability of, or risks associated with, appropriate technologies? 5%
QUESTION 7: By Business

1. Engineering resource availability

2. Material cost and delivery requirements

3. Construction resources availability

4. Regulatory and permitting challenges

5. Availability of, or risks associated with, appropriate technologies?
QUESTION 8:
Where has innovative technology played a more significant role in your business?

1. Operations 11%
2. Production-related Processes 27%
3. Safety 3%
4. Engineering & Design 51%
5. Construction 8%
QUESTION 8: By Business

1. Operations
   - Contractor: 9%
   - Owner: 8%
   - Supplier: 22%
   - Academic: 5%
   - Other: 0%

2. Production-related Processes
   - Contractor: 18%
   - Owner: 56%
   - Supplier: 7%
   - Academic: 27%
   - Other: 0%

3. Safety
   - Contractor: 4%
   - Owner: 0%
   - Supplier: 2%
   - Academic: 0%
   - Other: 0%

4. Engineering & Design
   - Contractor: 31%
   - Owner: 64%
   - Supplier: 60%
   - Academic: 64%
   - Other: 63%

5. Construction
   - Contractor: 9%
   - Owner: 5%
   - Supplier: 5%
   - Academic: 40%
   - Other: 5%