



FACTSHEET

TIC Council

The new voice of the testing, inspection and certification (TIC) industry

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What is the TIC Sector?

Testing, Inspection and Certification (TIC) companies cater to a diverse range of industry sectors and a variety of standards and legislation. Thus, independent TIC companies play a critical role in virtually all economic fields. The importance of and specific roles played by independent TIC companies varies greatly between countries and sectors. These range from agriculture, automotive, raw materials, IT and electronics, environmental protection, food testing, and oil and gas industries right through to maritime, medicine, education, tourism, logistics, consumer products and more.

Some of the key testing and certification services include quality and safety controls through conformity assessments. These include supply chain certifications, industrial site inspections, product testing, management system auditing and certification, periodic car inspections, pre-shipment inspection, consignment-based conformity assessments and many more.

Third-party TIC is a cost-effective conformity assessment method that drives higher levels of compliance. It ensures greater consumer protection with safer products, helps government agencies improve efficiencies and leverage scarce market surveillance resources. It also helps manufacturers reduce in-house compliance costs and navigate global market requirements more easily.

How it works

Accreditation Agencies

The independence and competence of TIC companies is guaranteed by national notification (normally mandated through accreditation) in individual countries.

To obtain a licence to operate, independent TIC companies must meet a very stringent set of requirements governed by specific standards, such as ISO 17065 – Requirements for Bodies Certifying Products, Processes and Services and ISO 17025 – General Requirements for the Competence of Testing and Calibration Laboratories. The licence to operate is granted at national levels by 'Accreditation Agencies' or 'Notification Bodies'.

TIC Council Compliance Programme

In addition to accreditation, TIC Council members are committed to following an additional set of requirements. These are set under the mandatory TIC Council compliance programme in order to protect the trust, social responsibility and reliability of the sector.

The TIC Council Compliance Principles address technical and business conduct and ethics in relation to the following areas:

- Integrity
- Conflict of Interest
- Confidentiality and Data Protection

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- Anti-Bribery
- Fair Business Conduct
- Health and Safety
- Fair Labour

These principles aim to set the highest ethical business practices in the TIC industry.

TIC Council

Born from the merger of former global TIC industry organizations IFIA and CEOC, the TIC Council brings together a total of approximately 90-member companies and organizations active in more than 160 countries, spanning every continent, speaking with one voice worldwide. The TIC industry represents around a million employees across the world with annual sales of approximately USD 200 billion¹.

Vision and Mission of the TIC Council

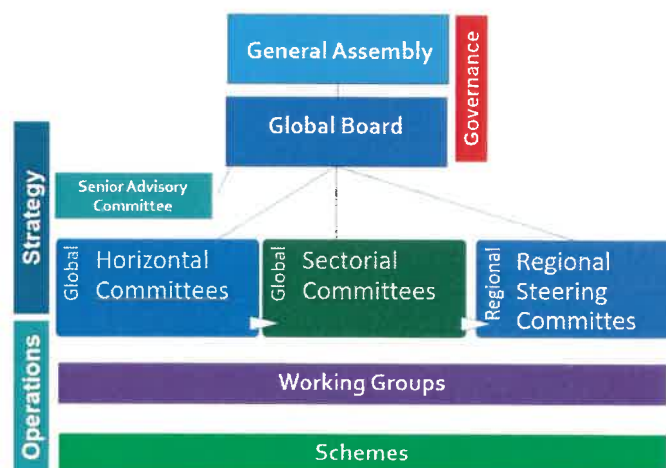
Vision

For the TIC Council to be recognized and trusted globally as the voice of the independent testing, inspection and certification industry, and to stand for best practice and the highest standards in safety, quality, health, ethics and sustainability.

Mission

As the voice of the global independent testing, inspection and certification industry, the TIC Council engages governments and key stakeholders to advocate for effective solutions that protect the public, support innovation and facilitate trade. The TIC Council works with its members to promote best practices in safety, quality, health, ethics and sustainability.

Governance and Structure of TIC Council



¹ <https://www.barclayscorporate.com/content/dam/corppublic/corporate/Documents/Industry-expertise/Testing-Report-2018.pdf>



TIC Global Board Composition

President:

- Michael Fübi – TÜV Rheinland, CEO

Vice Presidents:

- Frankie Ng – SGS, CEO
- Stefan Haas – TÜV AUSTRIA, CEO

Treasurer:

- Peter Boks – Saybolt, CEO

Members of the Global Board:

- Raj Naran – ALS, CEO
- Jean-Christophe Protais – APAVE, CEO
- Didier Michaud-Daniel – Bureau Veritas, CEO
- Karina Engström – Baltic Control, CEO
- Sébastien Dannaud – Cotecna, CEO
- Luiz Cugnier – Cugnier, CEO
- Stefan Kölbl – DEKRA, CEO
- Gilles Martin – Eurofins, CEO
- André Lacroix – Intertek, CEO
- Pedro Matias – ISQ, CEO
- Paul Hesselink – KIWA, CEO
- Alastair Marsh – Lloyd's Register, CEO (tbc)
- Ugo Salerno – RINA, CEO
- Rafael Schubiger – SVTI, CEO
- Tomáš Hruška – SZU, CEO
- Dirk Stenkamp – TÜV Nord, CEO
- Axel Stepken – TÜV SÜD, CEO
- Andrzej Ziółkowski – UDT, CEO
- Keith Williams – UL, CEO
- Marco Croon – Vinçotte, CEO

List of TIC Council Members

Full Members

- A/S Baltic Control Ltd Aarhus – <http://atg.cz/>
- AH Knight - Alfred H Knight – www.ahkgroup.com
- Alex Stewart International – www.alexstewartinternational.com
- Almaty Expertise – www.expertcci.kz
- ALS Limited – www.alsglobal.com

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- Amspec – www.amspecgroup.com
- Apave – www.apave.com
- Apragaz – www.apragaz.com
- Asia Quality Inspectors Ltd. – www.asia-quality.com
- Asialnspection Ltd. Hong Kong – www.asiainspection.com
- ATG – <http://atg.cz/>
- Baltic Control Ltd. Aarhus – www.balticcontrol.com
- Belgorail – <https://belgorail.be/>
- Bureau Veritas – www.bureauveritas.com
- Camin Cargo Control Inc – www.camincargo.com
- Cargo Inspections International – www.cargoinspections.com
- Cerins Korea – www.cerins.net
- Certispec Services Inc. Canada – www.certispec.com
- China Leon Inspection Holding Limited – www.huaxialihong.com
- CIS - Commodity Inspection Services BV. – www.cis-inspections.com
- CNCIR – www.cncir.eu
- Coastal Gulf & International – www.coastalgulf.com
- Cotecna Inspection SA – www.cotecna.com
- CQI - Control Quality Inspecoes Analises E Servicos Ltda – www.controlquality.com.br
- Cugnier Certificadora Ltda – Brazil, www.cugnier.com
- Control Union International Inspection Services GmbH – www.controlunion.de
- Control Union – www.controlunion.com
- CWM Survey & Inspection BV – www.cwminternational.com
- DEKRA – www.dekra.com
- Dr. Amin Controllers Private Limited – <http://www.rcaindia.com/contact.html>
- E.QU.A Srl – www.equasrlra.it
- EBF Engineering Bureau Franke International – www.bureaufranke.com
- Eurofins Scientific S.E. – www.eurofins.com
- FORCE Technology – www.force.dk
- Geo-Chem Far East Pte – www.geochem.net.in
- GSP LLA – www.gsp.ua
- HQTS - Helmsman Quality and Technology Services Co Ltd China – www.hqts.com
- INAIL – www.inail.it
- Independent Inspection Services LLC – www.iis.uz
- Inspectorate East Africa Ltd – www.inspectorate-ea.com
- Inspectorate Limited – www.inspectorate.net
- Inspekt RGH d.o.o. Sarajevo, Bosnia Herzegovina – www.inspekt-rgh.com.ba
- Integrated Inspection & Surveying – www.iisurveying.com
- Intertek – www.intertek.com
- IME - International Marine Experts – www.ime.com.pa/
- ISCIR – www.iscir.ro

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- ISQ – www.isq-group.com
- JEVIC - Japan Export Vehicle Inspection Center Company Limited – www.jevic.com/
- KCS Group of Companies – www.kcsgroup.co
- Kiwa – <https://www.kiwa.com/en/>
- China Leon Overseas
- Liftinstituut – www.liftinstituut.nl
- Lloyd's Register – www.lr.org
- Maloney Commodity Services Inc. USA – maloneyserv.com
- MAS Marine Services PVT LTD – www.mas-world.com
- Mitra S K Private India – www.mitras.com
- NCMS - National Collateral Management Services Ltd. – www.ncml.com
- NMCI Group of Companies – www.nmcigroup.com
- NMK Resources, Inc. – www.nmkresources.com
- Oil Test Internacional Latin America, Panama – www.otilatam.com
- OMIC - Overseas Merchandise Inspection Ltd – www.omicnet.com
- PGM Inspection – www.pgmgozetim.com
- PT Carsurin Indonesia – www.carsurin.com
- PT Superintending Company of Indonesia (SUCOFINDO) Perseo – www.sucofindo.co.id
- Quality Inspection Services Inc. Japan – www.qisjp.com
- Ravi Energie Group – www.ravienergie.com
- RINA S.p.A. – www.rina.org
- RRMG - Supervicao de Embarques E Descargas Ltda. – www.rrmglda.com.br
- Rochem Inspectors – www.rocheminspectors.com
- SAMTS – www.damtn.government.bg
- Saybolt – saybolt@corelab.com
- Seatrans Consulting Ltd, Russia – www.seatrans.ru
- SGS - Société Générale de Surveillance SA – www.sgs.com
- SGT Services (Thailand) Co., Ltd. – www.sgtservice.co.th
- SOEX (ANO “SOYUZEXPERTIZA CCI RF”) – www.soex.ru
- Software & Hardware Ingenieros S.R.Ltda – www.sh.com.pe
- Superinspect Group – www.superinspect.com.br
- SVTI – www.svti.ch
- SZU – www.szutest.cz
- TDT – www.tdt.gov.pl
- TI – www.tisr.sk
- TURK LOYDU – www.turkloydu.org
- TÜV AUSTRIA – www.tuv.at
- TÜV Nord Systems – www.tuv-nord.com
- TÜV Rheinland Group – www.tuv.com
- TÜV SÜD Group – www.tuev-sued.de / www.tuv-sud.com
- UDT – www.udt.gov.pl

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- UIS - Universal Inspectorate & Services Co Ltd – www.uis-inspection.com/
- UL Inc. – www.ul.com
- VDE – www.vde.com
- Viglienzona Adriatica – www.viglienzona.it
- Vincotte – www.vincotte.com
- V-Trust Inspection Services China – www.v-trust.com

Associated Members

- VdTÜV – www.vdtuev.de
- SAFed – www.safed.co.uk

Observer Member

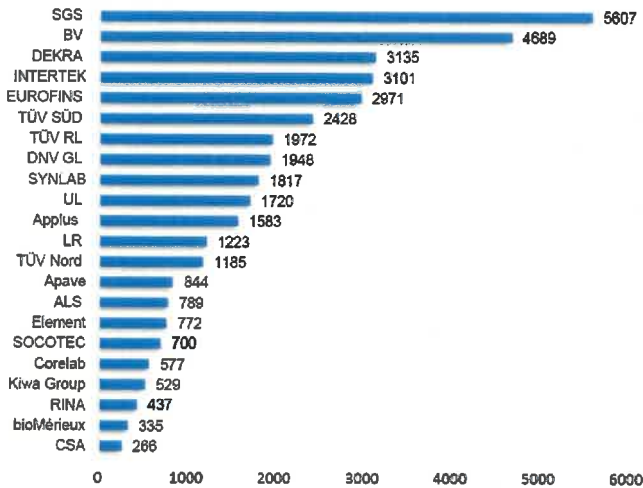
- CCIC - China Certification & Inspection Group Co. Ltd, China – www.ccic.com
- Optimal Group + – www.ogplus.com.ge

The TIC Market

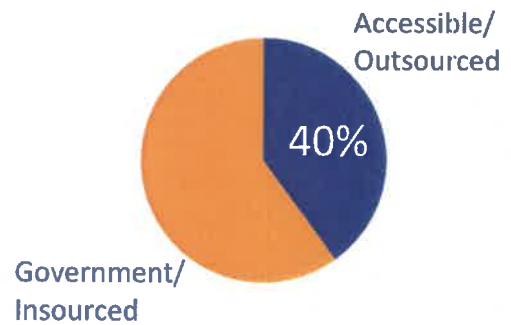
The global TIC market is valued at around €200bn. It is expected to grow at a compound annual growth rate (CAGR) of 5% between 2017 and 2023, with variations by sector,² which represents a very positive outlook for the TIC sector. As mentioned above, the TIC sector is active in almost all fields and it's also looking at all new technologies appearing on the market. From drones to blockchain, IoT and Big Data, recent advances and technologies are being embraced by TIC companies looking into all new capabilities that could bring added value for society.

² Source: Bureau Veritas 2016 Annual Report.

Revenue Top TIC companies 2017 (M€)

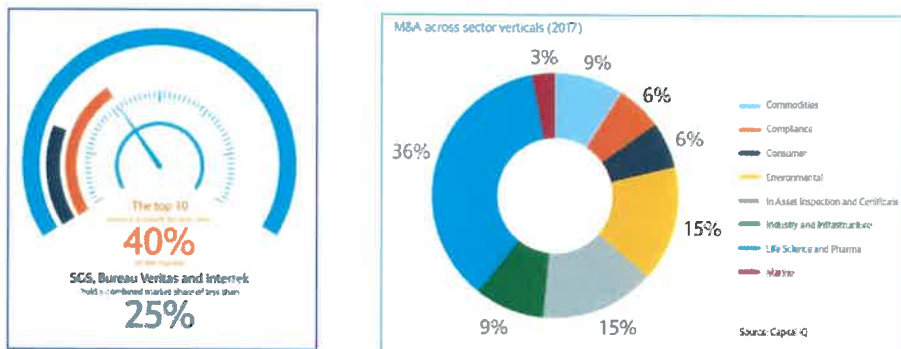


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Source: Bureau Veritas Annual Report 2016 & CATALIST report 2016

The market is highly fragmented. SGS, Bureau Veritas and Intertek hold a combined market share of less than 25%. The top 10 players account for less than 40% of the market. DEKRA, ALS and UL have also gathered scale and international presence while remaining more sector-focused.



Source: CLEARWATER TIC outlook 2018

2018 outlook: trends to follow and drivers of growth³:

- The push towards outsourcing – and the privatisation of state-owned laboratories;
- Increasing levels of regulation have triggered a transition from a voluntary-based risk management approach to mandatory testing services (e.g. after the recent vehicle emissions scandal);

³ CLEARWATER TIC outlook 2018



- TIC players expand into new markets and developing economies;
- Globalization as a major growth element of the TIC industry;
- General increases in global wealth that will result in increased expectations on the level of safety and quality;
- TIC has an increasingly important role in helping all industries save costs.

Sources:

- CEOC International White Paper: Trends & Challenges for the Third-Party TIC Sector
- Joint IFIA-CEOC-ACIL Position Paper: The Testing, Inspection and Certification Industry Perspectives On Trade
- TIC Outlook 2018, Trends and Prospects in the Testing, Inspection and Certification Sector, 2017: TIC Industry Resilience, Clearwater International Report