



## Q1 2020: Hong Kong Construction and Infrastructure Survey

# Conditions deteriorate further amid global pandemic

- Total workloads fall a sharpest pace (in net balance terms) since survey was formed in 2018
- Expectations for workloads and headcounts remain firmly in negative territory
- Insufficient demand cited to be the largest factor holding back activity

The Q1 2020 RICS Hong Kong Construction and Infrastructure Survey results signal a further slump in conditions over the quarter, with the global coronavirus outbreak weighing heavily on activity.

During Q1, total workloads fell for a third successive report, as the pace of decline (in net balance terms) accelerated over the period. Looking at the breakdown, workloads fell across each sector, with the private industrial and commercial categories once again returning the most negative net balance readings (-55% and -53% respectively). Even so, the latest net balances across the remaining sectors also represent the poorest readings going back to the survey's inception in 2018.

In keeping with this, a net balance of -44% of survey participants report that headcounts were reduced over the quarter. At the same time, profit margins, new workloads and new business enquiries all deteriorated sharply. In fact, the only positive element to the latest returns comes from indicator on payment delays, which points to a stable picture emerging following three consecutive quarterly increases.

72% of respondents cite a lack of demand as a critical factor holding back activity (up from 66% last time). Aside from this, more than 50% of contributors also report that financial constraints, competition and a shortage of materials are hampering the market at this point in time.

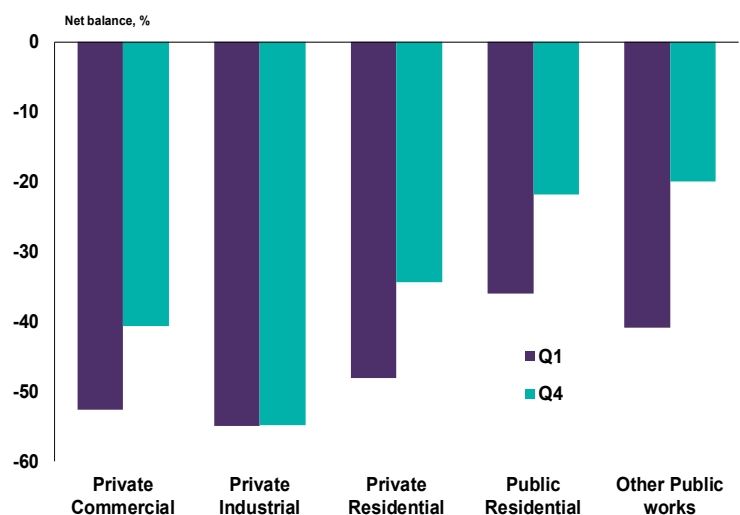
Looking ahead, twelve-month expectations on workloads (including both infrastructure and non-infrastructure workloads) remain in negative territory. Likewise, firms are anticipated to further reduce headcounts over the year to come, while profit margins are expected to be squeezed significantly on the same

basis.

With regards to the outlook for tender prices, a net balance of -30% of respondents expect prices for building projects to decline in the year to come (down from a reading of -13% in Q4). Meanwhile, for civil engineering projects, a net balance of -31% of contributors anticipate tender prices will come down over the next twelve months (comparable figure was -20% last quarter).

Finally, total construction costs are anticipated to decline modestly over the year ahead, evidenced by a net balance of -13% of contributors expecting a decline. This appears to be largely a result of negative expectations for per unit labour cost.

### Workloads by sector



## RICS Consensus Tender Prices &amp; Construction Costs (Next 12 months)

	Tender Prices		Construction Costs		
	Building	Civil Engineering	Commercial	Residential	Total
<b>North America</b>	<b>+2.1%</b>	<b>+1.8%</b>	<b>+1.7%</b>	<b>+1.4%</b>	<b>+1.9%</b>
<b>Canada</b>	<b>+2.0%</b>	<b>+1.7%</b>	<b>+1.6%</b>	<b>+1.3%</b>	<b>+1.9%</b>
British Columbia	+0.5%	+0.6%	+0.4%	+0.5%	+1.2%
Ontario	+3.4%	+3.1%	+3.2%	+3.1%	+3.2%
Praries & Territories	-1.0%	-1.2%	-1.0%	-1.1%	-0.3%
<b>USA</b>	<b>+2.4%</b>	<b>+2.0%</b>	<b>+2.4%</b>	<b>+1.7%</b>	<b>+1.8%</b>
Northeast	+2.3%	+0.2%	-0.6%	-0.5%	+0.7%
South	+4.1%	+4.4%	+3.4%	+1.6%	+4.1%
West	+1.2%	+1.3%	+3.1%	+2.9%	+0.8%
<b>Asia Pacific</b>	<b>+1.2%</b>	<b>+1.6%</b>	<b>+2.1%</b>	<b>+1.9%</b>	<b>+2.3%</b>
<b>Australasia</b>	<b>+0.8%</b>	<b>+2.1%</b>	<b>+1.8%</b>	<b>+1.4%</b>	<b>+2.1%</b>
<b>Australia</b>	<b>+0.9%</b>	<b>+2.5%</b>	<b>+2.0%</b>	<b>+1.2%</b>	<b>+1.8%</b>
New South Wales	+0.1%	+2.2%	+0.7%	+0.1%	+0.6%
Queensland	+2.6%	+4.9%	+4.2%	+3.1%	+3.5%
Victoria	+0.8%	+1.1%	+2.3%	+1.8%	+2.5%
Western Australia	+0.8%	+1.7%	+1.4%	+0.7%	+1.5%
<b>New Zealand</b>	<b>+0.8%</b>	<b>+1.8%</b>	<b>+1.8%</b>	<b>+1.8%</b>	<b>+2.4%</b>
North Island	+1.1%	+2.3%	+2.2%	+2.6%	+2.9%
South Island	-0.7%	-0.3%	+0.3%	-1.0%	+0.8%
<b>East Asia</b>	<b>-0.1%</b>	<b>+0.1%</b>	<b>+1.0%</b>	<b>+0.8%</b>	<b>+0.9%</b>
<b>China</b>	<b>+4.4%</b>	<b>+4.6%</b>	<b>+4.3%</b>	<b>+3.8%</b>	<b>+4.6%</b>
Eastern Region	+3.8%	+4.0%	+3.6%	+3.2%	+3.5%
Northern Region	+7.1%	+5.8%	+6.4%	+5.8%	+6.4%
South Central Region	+5.7%	+6.4%	+3.9%	+3.5%	+5.4%
Southwest Region	+3.1%	+3.5%	+5.6%	+4.0%	+4.8%
<b>Hong Kong</b>	<b>-2.2%</b>	<b>-2.2%</b>	<b>-0.6%</b>	<b>-0.4%</b>	<b>-0.8%</b>
<b>Japan</b>	<b>+0.5%</b>	<b>+0.3%</b>	<b>+0.3%</b>	<b>-2.3%</b>	<b>+0.3%</b>
<b>South Asia</b>	<b>+4.4%</b>	<b>+4.1%</b>	<b>+4.5%</b>	<b>+4.3%</b>	<b>+4.9%</b>
<b>India</b>	<b>+4.1%</b>	<b>+3.9%</b>	<b>+4.2%</b>	<b>+3.9%</b>	<b>+4.4%</b>
Northern Region	+3.7%	+4.0%	+4.1%	+3.7%	+4.0%
Southern Region	+3.5%	+3.6%	+3.7%	+4.0%	+4.0%
Western Region	+5.1%	+4.3%	+4.8%	+3.4%	+4.6%
<b>Sri Lanka</b>	<b>+5.1%</b>	<b>+4.5%</b>	<b>+5.3%</b>	<b>+5.4%</b>	<b>+6.3%</b>
Western Province	+5.3%	+4.7%	+5.9%	+6.2%	+7.2%

## RICS Consensus Tender Prices &amp; Construction Costs (Next 12 months)

	Tender Prices		Construction Costs		
	Building	Civil Engineering	Commercial	Residential	Total
<b>Southeast Asia</b>	<b>+0.6%</b>	<b>+1.0%</b>	<b>+1.7%</b>	<b>+1.5%</b>	<b>+2.0%</b>
<b>Malaysia</b>	<b>-1.9%</b>	<b>-1.6%</b>	<b>-0.8%</b>	<b>-1.1%</b>	<b>-0.7%</b>
Borneo	-2.5%	-3.0%	-0.2%	-0.9%	+0.2%
Northern Region	-2.7%	-1.7%	-1.9%	-0.6%	-0.4%
Southern Region	-3.3%	-3.6%	-3.3%	-2.6%	-4.1%
Western Region	-1.6%	-1.3%	-0.5%	-1.1%	-0.5%
<b>Philippines</b>	<b>+6.6%</b>	<b>+6.8%</b>	<b>+6.8%</b>	<b>+6.9%</b>	<b>+7.2%</b>
<b>Singapore</b>	<b>+0.2%</b>	<b>+1.4%</b>	<b>+1.5%</b>	<b>+1.7%</b>	<b>+2.7%</b>
<b>Middle East &amp; Africa</b>	<b>+1.7%</b>	<b>+1.6%</b>	<b>+2.6%</b>	<b>+1.9%</b>	<b>+2.4%</b>
<b>Middle East</b>	<b>+0.2%</b>	<b>+0.1%</b>	<b>+1.1%</b>	<b>+0.4%</b>	<b>+1.0%</b>
<b>Bahrain</b>	<b>+2.1%</b>	<b>+1.1%</b>	<b>+2.1%</b>	<b>+1.7%</b>	<b>+2.7%</b>
<b>Kuwait</b>	<b>+3.2%</b>	<b>+1.9%</b>	<b>+3.6%</b>	<b>+1.9%</b>	<b>+3.2%</b>
<b>Oman</b>	<b>+1.5%</b>	<b>+1.6%</b>	<b>+2.9%</b>	<b>+2.4%</b>	<b>+2.7%</b>
<b>Qatar</b>	<b>+3.4%</b>	<b>+3.5%</b>	<b>+3.6%</b>	<b>+2.7%</b>	<b>+3.8%</b>
<b>Saudi Arabia</b>	<b>+2.2%</b>	<b>+1.4%</b>	<b>+3.4%</b>	<b>+3.2%</b>	<b>+2.6%</b>
Makkah	+4.1%	+2.6%	+4.1%	+3.6%	+4.4%
Riyadh	+4.0%	+5.9%	+5.7%	+4.8%	+6.2%
<b>UAE</b>	<b>-2.8%</b>	<b>-2.8%</b>	<b>-1.7%</b>	<b>-2.5%</b>	<b>-1.9%</b>
Abu Dhabi	-4.0%	-4.0%	-3.1%	-4.5%	-3.7%
Dubai	-2.4%	-2.4%	-1.2%	-1.7%	-1.2%
<b>Africa</b>	<b>+3.8%</b>	<b>+3.9%</b>	<b>+4.6%</b>	<b>+4.0%</b>	<b>+4.3%</b>
<b>Ghana</b>	<b>+3.1%</b>	<b>+2.6%</b>	<b>+2.6%</b>	<b>+2.7%</b>	<b>+1.8%</b>
<b>Mauritius</b>	<b>+6.5%</b>	<b>+6.4%</b>	<b>+7.1%</b>	<b>+6.9%</b>	<b>+7.1%</b>
<b>Nigeria</b>	<b>+6.8%</b>	<b>+7.8%</b>	<b>+7.3%</b>	<b>+5.5%</b>	<b>+6.3%</b>
Northern States	+7.5%	+7.5%	+7.0%	+5.9%	+6.5%
Southern States	+6.4%	+8.0%	+7.5%	+5.3%	+6.3%
<b>South Africa</b>	<b>+3.0%</b>	<b>+2.8%</b>	<b>+3.8%</b>	<b>+3.8%</b>	<b>+4.1%</b>
Gauteng	+4.0%	+3.5%	+3.9%	+3.5%	+4.1%
KwaZulu Natal	+1.4%	+2.4%	+2.8%	+4.2%	+3.2%

## RICS Consensus Labour &amp; Material Costs (Next 12 months)

	Labour Costs		Material Costs					
	Skilled	Unskilled	Bricks	Concrete	Copper	Glass	Steel	Total
<b>Asia Pacific</b>	<b>+2.4%</b>	<b>+1.3%</b>	<b>+2.1%</b>	<b>+2.8%</b>	<b>+2.6%</b>	<b>+2.1%</b>	<b>+2.7%</b>	<b>+2.7%</b>
<b>Australasia</b>	<b>+1.6%</b>	<b>+0.4%</b>	<b>+2.0%</b>	<b>+2.4%</b>	<b>+2.9%</b>	<b>+2.6%</b>	<b>+3.2%</b>	<b>+2.5%</b>
<b>Australia</b>	<b>+1.5%</b>	<b>+0.1%</b>	<b>+1.9%</b>	<b>+2.4%</b>	<b>+2.9%</b>	<b>+2.5%</b>	<b>+3.2%</b>	<b>+2.6%</b>
New South Wales	+1.4%	+0.3%	+2.8%	+3.5%	+3.5%	+3.5%	+3.8%	+3.2%
Queensland	+2.8%	+1.3%	+3.0%	+3.4%	+2.4%	+1.6%	+1.4%	+2.4%
Victoria	+0.4%	+0.1%	+1.0%	+1.0%	+1.2%	+1.7%	+2.4%	+1.8%
Western Australia	+0.5%	-1.8%	-1.2%	-1.2%	+4.7%	+0.7%	+4.5%	+2.7%
<b>New Zealand</b>	<b>+1.7%</b>	<b>+0.9%</b>	<b>+2.2%</b>	<b>+2.4%</b>	<b>+3.1%</b>	<b>+2.9%</b>	<b>+3.4%</b>	<b>+2.5%</b>
North Island	+2.2%	+1.8%	+3.0%	+3.0%	+3.2%	+3.2%	+4.2%	+3.1%
South Island	+0.8%	-0.7%	+0.5%	+1.1%	+2.6%	+2.0%	+1.7%	+1.1%
<b>East Asia</b>	<b>+1.3%</b>	<b>-0.2%</b>	<b>+1.6%</b>	<b>+1.8%</b>	<b>+1.4%</b>	<b>+1.1%</b>	<b>+1.3%</b>	<b>+1.6%</b>
<b>China</b>	<b>+5.8%</b>	<b>+3.8%</b>	<b>+4.4%</b>	<b>+4.5%</b>	<b>+2.9%</b>	<b>+2.2%</b>	<b>+3.1%</b>	<b>+4.0%</b>
Eastern Region	+4.6%	+2.5%	+3.4%	+3.2%	+2.4%	+1.2%	+2.2%	+3.1%
Northern Region	+5.6%	+4.2%	+7.3%	+6.4%	+2.4%	+2.9%	+4.0%	+6.1%
South Central Region	+9.4%	+7.5%	+7.4%	+8.4%	+5.0%	+5.0%	+6.5%	+6.8%
Southwest Region	+5.4%	+1.9%	+2.0%	+2.7%	+2.1%	+0.9%	+1.3%	+1.7%
<b>Hong Kong</b>	<b>-0.7%</b>	<b>-2.2%</b>	<b>+0.5%</b>	<b>+0.7%</b>	<b>+0.6%</b>	<b>+0.6%</b>	<b>+0.5%</b>	<b>+0.6%</b>
<b>Japan</b>	<b>-0.3%</b>	<b>+1.1%</b>	<b>+0.7%</b>	<b>+1.0%</b>	<b>+0.9%</b>	<b>+1.7%</b>	<b>+0.6%</b>	<b>+0.2%</b>
<b>South Asia</b>	<b>+5.2%</b>	<b>+4.5%</b>	<b>+4.2%</b>	<b>+5.1%</b>	<b>+4.9%</b>	<b>+4.0%</b>	<b>+5.3%</b>	<b>+4.8%</b>
<b>India</b>	<b>+5.1%</b>	<b>+4.5%</b>	<b>+4.1%</b>	<b>+4.8%</b>	<b>+4.4%</b>	<b>+3.5%</b>	<b>+4.8%</b>	<b>+4.3%</b>
Northern Region	+4.5%	+3.6%	+4.5%	+5.2%	+4.5%	+4.4%	+5.4%	+4.4%
Southern Region	+5.5%	+4.6%	+4.1%	+4.6%	+4.4%	+3.0%	+3.7%	+3.9%
Western Region	+4.8%	+4.8%	+3.2%	+4.0%	+3.8%	+3.2%	+5.5%	+4.2%
<b>Sri Lanka</b>	<b>+5.6%</b>	<b>+5.0%</b>	<b>+4.5%</b>	<b>+6.1%</b>	<b>+6.7%</b>	<b>+5.7%</b>	<b>+7.3%</b>	<b>+6.6%</b>
Western Province	+5.4%	+4.9%	+5.0%	+6.2%	+7.1%	+6.0%	+7.4%	+6.8%
<b>Southeast Asia</b>	<b>+1.9%</b>	<b>+1.2%</b>	<b>+1.2%</b>	<b>+2.3%</b>	<b>+2.0%</b>	<b>+1.6%</b>	<b>+1.9%</b>	<b>+2.5%</b>
<b>Malaysia</b>	<b>+0.4%</b>	<b>-0.2%</b>	<b>-0.2%</b>	<b>+0.8%</b>	<b>+0.8%</b>	<b>+0.0%</b>	<b>-0.1%</b>	<b>+0.6%</b>
Borneo	+0.9%	-1.2%	+0.7%	+2.6%	+3.6%	+3.6%	+2.1%	+3.2%
Northern Region	+0.9%	-0.8%	-3.3%	-1.1%	+0.0%	-1.9%	-1.8%	-2.1%
Southern Region	-1.5%	-1.5%	-2.4%	-0.9%	-2.3%	-3.6%	-3.2%	-0.5%
Western Region	+0.4%	+0.1%	+0.2%	+1.0%	+0.8%	+0.1%	-0.0%	+0.8%
<b>Philippines</b>	<b>+4.4%</b>	<b>+3.6%</b>	<b>+3.7%</b>	<b>+5.1%</b>	<b>+4.2%</b>	<b>+4.5%</b>	<b>+5.8%</b>	<b>+6.0%</b>
<b>Singapore</b>	<b>+3.1%</b>	<b>+2.5%</b>	<b>+1.5%</b>	<b>+3.3%</b>	<b>+1.8%</b>	<b>+1.8%</b>	<b>+2.2%</b>	<b>+3.4%</b>

## RICS Consensus Labour &amp; Material Costs (Next 12 months)

	Labour Costs		Material Costs					
	Skilled	Unskilled	Bricks	Concrete	Copper	Glass	Steel	Total
<b>Middle East &amp; Africa</b>	<b>+2.7%</b>	<b>+1.7%</b>	<b>+2.5%</b>	<b>+2.8%</b>	<b>+3.5%</b>	<b>+3.2%</b>	<b>+3.8%</b>	<b>+3.4%</b>
<b>Middle East</b>	<b>+1.5%</b>	<b>+0.7%</b>	<b>+1.7%</b>	<b>+1.6%</b>	<b>+2.1%</b>	<b>+2.2%</b>	<b>+2.3%</b>	<b>+2.1%</b>
<b>Bahrain</b>	<b>+1.4%</b>	<b>+0.7%</b>	<b>+2.5%</b>	<b>+1.7%</b>	<b>+3.1%</b>	<b>+3.1%</b>	<b>+2.7%</b>	<b>+2.9%</b>
<b>Kuwait</b>	<b>+2.6%</b>	<b>+2.3%</b>	<b>+2.0%</b>	<b>+1.9%</b>	<b>+1.9%</b>	<b>+1.9%</b>	<b>+2.0%</b>	<b>+1.9%</b>
<b>Oman</b>	<b>+2.4%</b>	<b>+2.4%</b>	<b>+0.5%</b>	<b>+1.0%</b>	<b>+2.5%</b>	<b>+2.5%</b>	<b>+2.4%</b>	<b>+2.0%</b>
<b>Qatar</b>	<b>+3.6%</b>	<b>+2.7%</b>	<b>+3.8%</b>	<b>+4.5%</b>	<b>+5.1%</b>	<b>+5.2%</b>	<b>+5.1%</b>	<b>+4.7%</b>
<b>Saudi Arabia</b>	<b>+3.8%</b>	<b>+2.2%</b>	<b>+2.6%</b>	<b>+1.8%</b>	<b>+2.4%</b>	<b>+2.4%</b>	<b>+3.1%</b>	<b>+3.2%</b>
Makkah	+4.8%	+3.7%	+3.6%	+1.7%	+2.7%	+2.5%	+4.0%	+4.5%
Riyadh	+3.8%	+3.3%	+4.7%	+5.9%	+6.5%	+5.3%	+6.8%	+6.6%
<b>UAE</b>	<b>-0.5%</b>	<b>-1.1%</b>	<b>+0.4%</b>	<b>+0.1%</b>	<b>+0.1%</b>	<b>+0.3%</b>	<b>+0.4%</b>	<b>+0.3%</b>
Abu Dhabi	-2.5%	-2.7%	+0.1%	-0.1%	-1.3%	-1.0%	-1.5%	-0.9%
Dubai	+0.3%	-0.5%	+0.6%	+0.3%	+0.7%	+0.9%	+1.2%	+0.9%
<b>Africa</b>	<b>+4.6%</b>	<b>+3.0%</b>	<b>+3.7%</b>	<b>+4.6%</b>	<b>+5.7%</b>	<b>+4.7%</b>	<b>+6.3%</b>	<b>+5.4%</b>
<b>Ghana</b>	<b>+7.5%</b>	<b>+2.9%</b>	<b>+3.9%</b>	<b>+4.3%</b>	<b>+5.8%</b>	<b>+5.6%</b>	<b>+5.0%</b>	<b>+5.8%</b>
<b>Mauritius</b>	<b>+6.0%</b>	<b>+5.5%</b>	<b>+5.5%</b>	<b>+5.2%</b>	<b>+7.4%</b>	<b>+7.8%</b>	<b>+6.2%</b>	<b>+6.5%</b>
<b>Nigeria</b>	<b>+4.9%</b>	<b>+3.5%</b>	<b>+3.5%</b>	<b>+5.3%</b>	<b>+5.6%</b>	<b>+5.9%</b>	<b>+7.3%</b>	<b>+5.6%</b>
Northern States	+7.6%	+5.7%	+4.7%	+5.8%	+5.9%	+6.6%	+8.2%	+6.6%
Southern States	+3.6%	+2.4%	+2.9%	+5.1%	+5.4%	+5.5%	+6.8%	+5.1%
<b>South Africa</b>	<b>+4.7%</b>	<b>+3.9%</b>	<b>+4.5%</b>	<b>+5.1%</b>	<b>+6.8%</b>	<b>+4.4%</b>	<b>+7.2%</b>	<b>+5.3%</b>
Gauteng	+4.3%	+3.7%	+4.0%	+4.8%	+6.9%	+4.0%	+7.7%	+4.8%
KwaZulu Natal	+4.3%	+3.5%	+5.3%	+5.6%	+6.9%	+4.7%	+6.7%	+6.6%

# Information

## Construction and Infrastructure Survey

RICS' Asia-Pacific and Middle East Construction and Infrastructure Survey is a quarterly guide to the trends in the construction and infrastructure markets. The report is available from the RICS website [www.rics.org/economics](http://www.rics.org/economics) along with other surveys covering the housing market, residential lettings, commercial property, construction activity and the rural land market.

## Methodology

Survey questionnaires were sent out on 11 March 2020 with responses received until 16 April 2020. Respondents were asked to compare conditions over the latest three months with the previous three months as well as their views as to the outlook. A total of 1323 company responses were received globally. Results are collated at a country level with regional results only reported if a minimum of ten responses received. Responses in Canada were collected in conjunction with the Canadian Institute of Quantity Surveyors. Responses in the United States were collected in conjunction with the Association for the Advancement of Cost Engineering.

Net balance = Proportion of respondents reporting a rise in a variable (e.g. occupier demand) minus those reporting a fall (if 30% reported a rise and 5% reported a fall, the net balance will be 25%). Net balance data can range from -100 to +100.

A positive net balance reading indicates an overall increase while a negative reading indicates an overall decline.

## Contact details

This publication has been produced by RICS. For all economic enquiries, including participation in the monitor please contact: [economics@rics.org](mailto:economics@rics.org)

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## Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the valuation, development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to markets and effecting positive change in the built and natural environments.

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