



Committee on European Consulting Future

EFCA GAM

Rome 27 May 2010

Lena Wästfelt



Topics

- **Presentation** – increase awareness and interest in future strategies
- **Report** – figures, markets and trends
- **Survey** – EFCA statements



Presentation

- Support the MAs in national discussions / seminars with firms, other stakeholders, and clients
- Trends, facts and challenges for the industry and the firms
- It is up to the firm to evaluate alternative approaches and decide the most feasible and suitable strategy



A VISION OF THE EUROPEAN CONSULTING FUTURE (2020)

How will YOU differentiate, prosper,
grow and take leadership?



A vision of the European Consulting Future

Which strategic issues will this presentation address?

1. What business are you really in? What is its purpose?
2. Which global issues impact on our industry?
3. What are our industry's strengths and weaknesses?
4. What are future business opportunities?
5. What factors are critical for success or failure?
6. Where to position your firm in the supply chain? Clients and risks?
7. What are future strategic / leadership skills?
8. How to capitalize upon global challenges?
9. How to reach your firm's potential?



What will this presentation address?

TRENDS, FACTS AND CHALLENGES

FOR OUR INDUSTRY AND YOUR FIRM

IN ALL FIELDS RELATED TO THE BUILT ENVIRONMENT

–

Directions for your goal setting



1. What business are you really in?

ECONOMIC RELEVANCE

The work of engineers and the consulting industry provides a valuable contribution to the quality of the European built environment and the quality of citizens' every day lives.

- 1,000,000 staff, mainly highly qualified provide
- € 100 billion engineering services annually in the EU
- € 1,800 billion annual investments in construction and equipment in EU
- that corresponds to 15% of € 12,000 billion of GNP in 2009



3a. What are our industry's strengths & weaknesses?

Can European engineering consultancy firms continue to play a major role in the global development?

Main Strengths [S]

- Relevant knowledge
- Independent
- Providing value for money
- Strong integrity

Main Weaknesses [W]

- Lack of visibility
- Many small firms
- Price competition
- Lack of internal innovation



3c. What factors are critical for success or failure?

Strengths - Opportunities

- Relevant knowledge for increasing complexity of society
- Providing value for money for contractors and developers
- Independent/self-supporting for open markets and competition

Strengths - Threats

- Integrity and interrelation with society for acquiring qualified staff
- Providing planning solutions to beat engineers from contractors
- Providing value for money, to ask and get money for value



3c. What factors are critical for success or failure?

Weaknesses - Opportunities

- Profiling the industry dealing with the global challenges
- Avoiding price-competition now clients become more professional
- Cooperation or mergers to enter new markets and competitions

Weaknesses - Threats

- Profiling the industry for acquiring enough qualified staff
- Cooperation or mergers to beat engineers from contractors
- Innovating your business, to avoid price-competition



5. Do new contract models require new business models?

- Do **new contract models** bring new business opportunities for Consulting Engineers ?
- Which **new roles** can Consulting Engineers play in the changing supply chain?
- Does our industry have the strength for **higher and other risks**, and how should firms adapt to seize the opportunities?



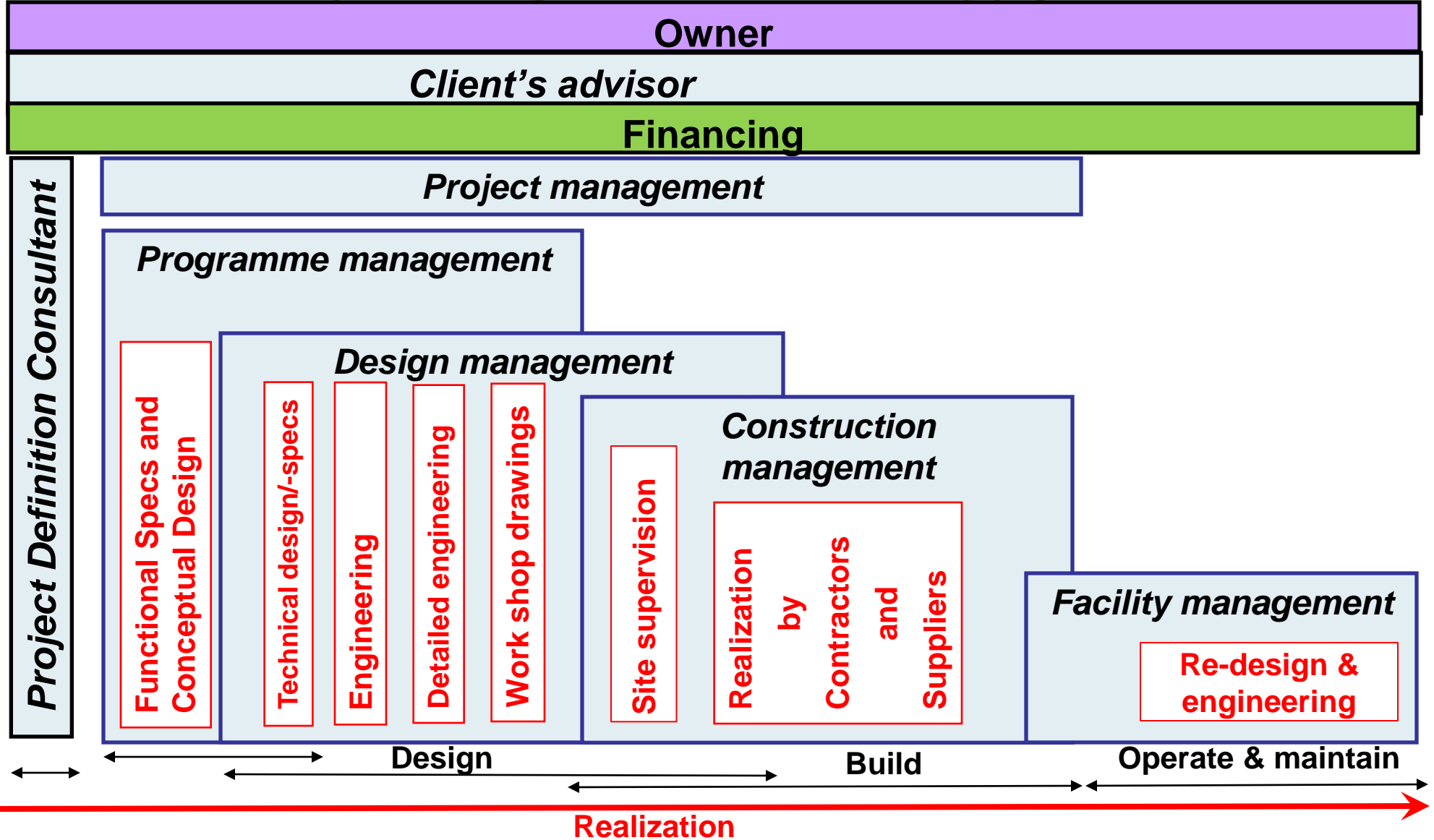
5.b Main contract models in the building industry

- Traditional Design-bid-Build contracts
- Integrated engineering contracts
- Management contracts
- Integrated building contracts
- Financed integrated building contracts

Questions: Which roles can consulting engineers play?
With what kind of risks and liabilities?
For what clients?



5.a Where to position your firm in the supply chain?





5.i New demands for our industry

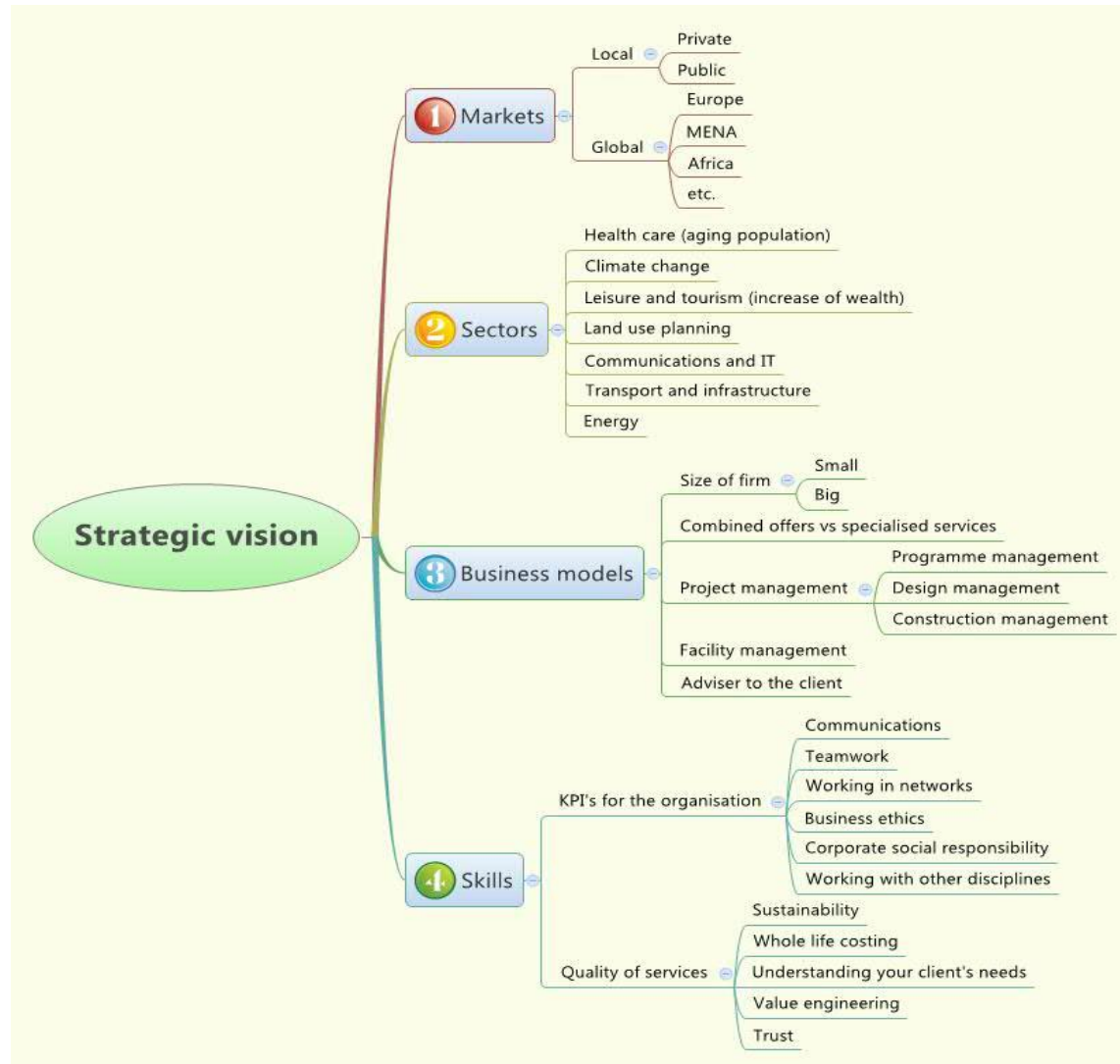
New expectations from (new) clients come with

- new contract models
- state of the art knowledge and expertise
- growing responsibilities and
- growing risks

but in many cases also: growing profits!



7. How to reach your firm's potential?





8. Our Vision!

European Engineering Consultancy firms play a strategic role in **the development of a sustainable and livable Europe**

European Engineering Consultancy firms play a strategic role in **the economic growth and welfare of the European Union**

European Engineering Consultancy firms play a strategic role in **the global consulting engineering business**



ECF COM members

Lena Wästfelt, Sweden (Chair)

José Amorim Faria, Portugal

Henrik Garver, Denmark

Andreas Loukatos, Greece

Raffaele Gorjux, Italy

Paul Oortwijn, Netherlands

Anya De Bie, Belgium

Dominique Boisseleau, Spain

Klaus Rollenhagen, Germany

Jean Félix and Karine Leverger, France

Timo Myllys, Finland

Krzysztof Bokowy, Poland