

FIDIC-EFCA 2003 Annual Survey

Consulting engineering industry

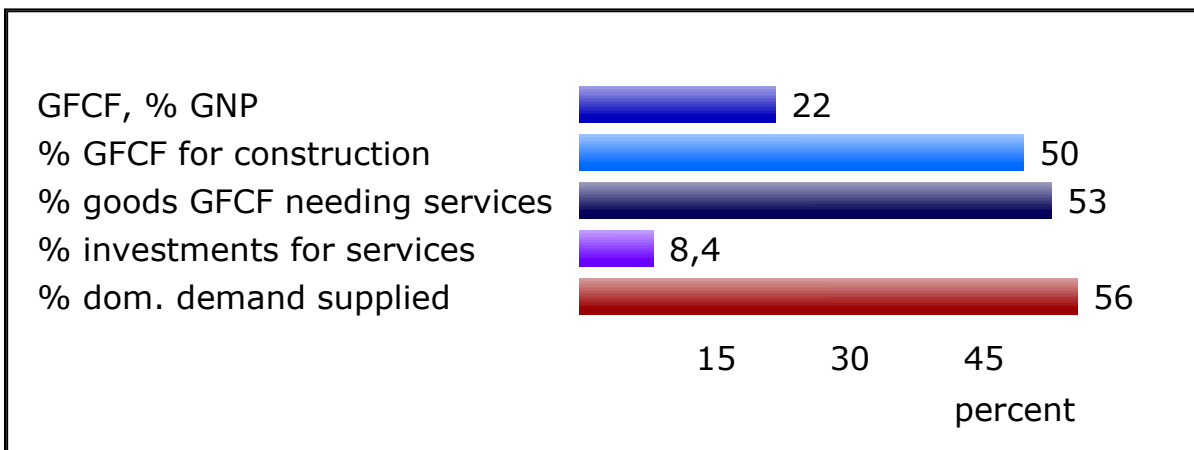
1. Industry: macroeconomic calculation of industry domestic demand

The annual investment in a country's infrastructure is equal to the Gross Fixed Capital Formation (GFCF) in construction and a percentage of the GFCF for durable goods production. The figure shows the average for association countries of the GFCF as a percentage of GNP.

All of the construction GFCF, given in the figure as an average for association countries, requires technology-based intellectual services, along with a percentage of the durable goods investment (the average - some 53% - for association countries is given in the figure).

The sum of the construction GFCF and the durable goods GFCF requiring services gives the total investment requiring services. A percentage, with an average value of some 8.4% for association countries, is spent on services to give the total domestic demand. The consulting engineering industry is made up of firms whose main business (more than 50% of annual turnover) is to supply these services (on average, the industry supplies 56% of demand).

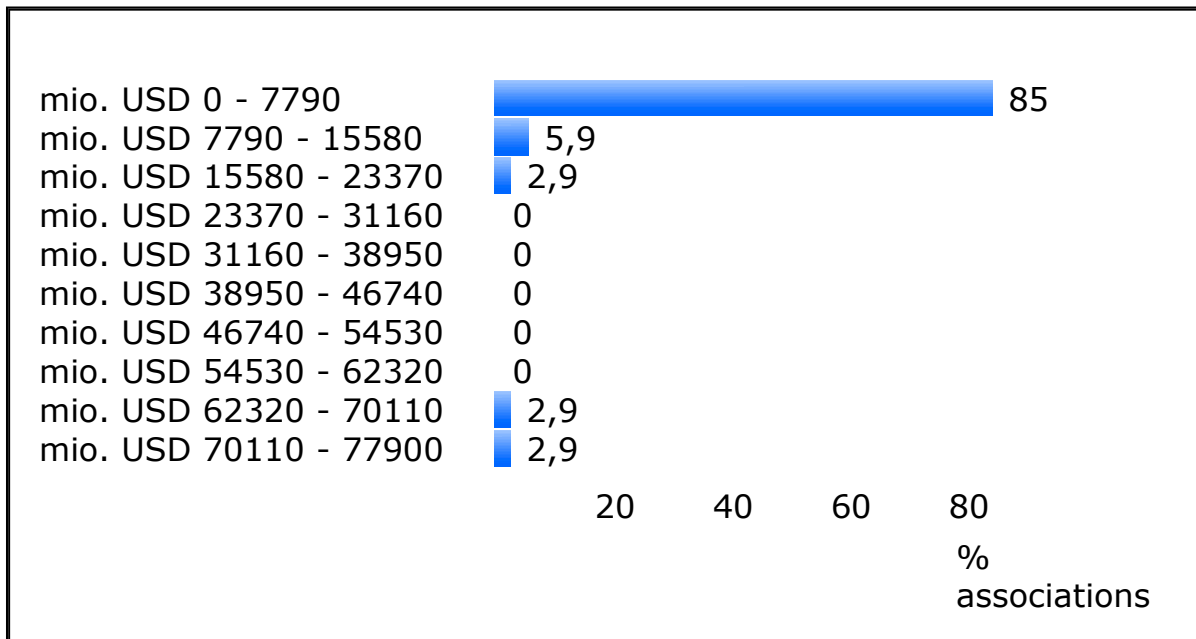
Average number of respondents: 41
(FIDIC associations: non-umbrella and umbrella).



2. Industry: demand

The figure shows the distribution of the consulting engineering industry domestic demand, in millions USD, for association countries, calculated from macroeconomic data.

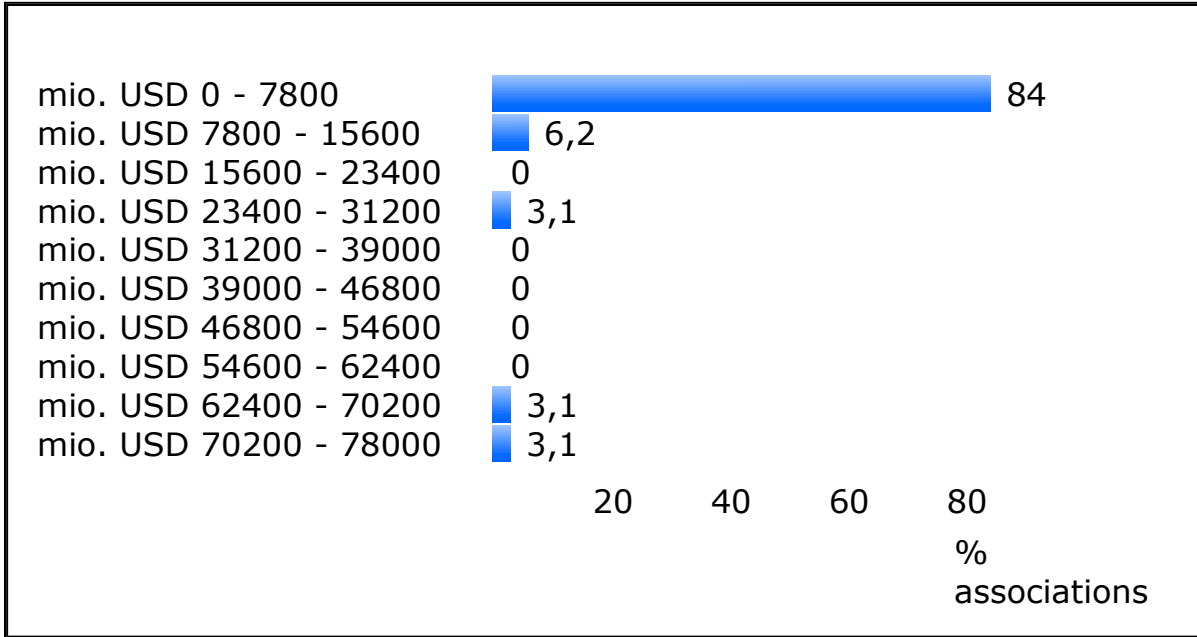
Average number of respondents: 34.
(FIDIC associations: non-umbrella and umbrella).



3. Industry: turnover

Adding exports to, and subtracting imports from, an association country's industry domestic gives the domestic industry turnover. The figure shows the distribution of the consulting engineering industry domestic turnover, in millions USD, for association countries.

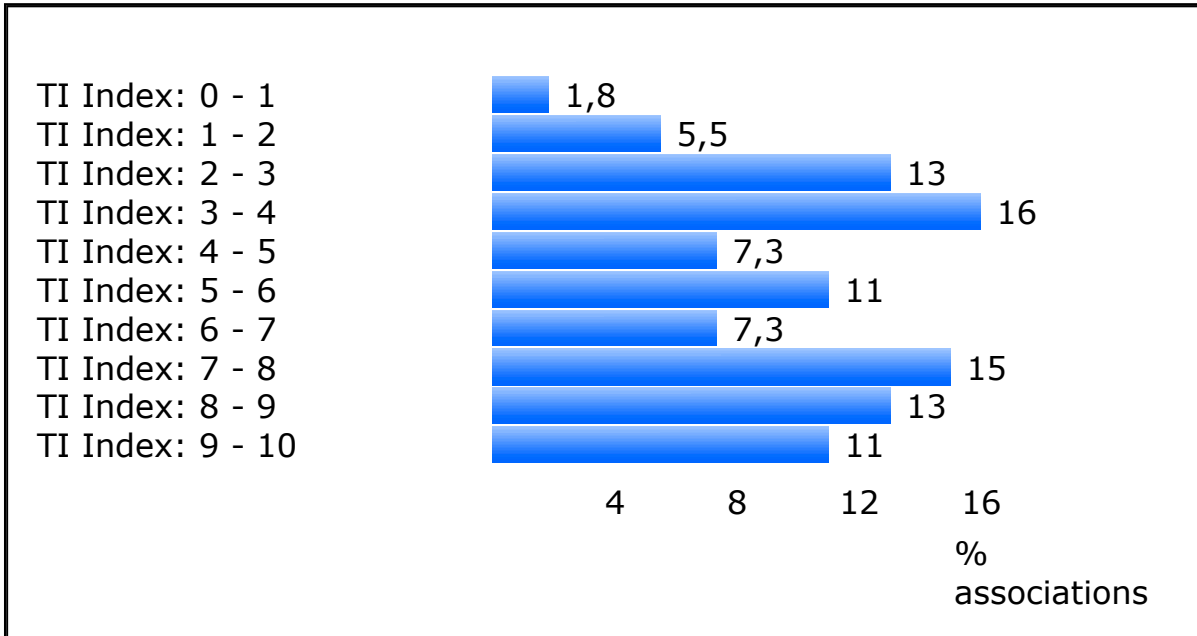
Average number of respondents: 32.
(FIDIC associations: non-umbrella and umbrella).



4. Industry: environment

The consulting engineering industry domestic demand is promoted by business integrity, a regulated industry, clear public procurement procedures and the Quality-Based Selection of consultants. As a measure of integrity, the figure shows the distribution of the Transparency International Corruption Perceptions Index for association countries, where the least corrupt has the highest index on a scale of zero to 20.

Average number of respondents: 55.
(FIDIC associations: non-umbrella and umbrella).



5. Industry: environment

The figure shows the average percentages of association countries that report compulsory registration of consulting engineering firms and clear public procurement procedures, where compulsory registration and clear public procurement comply with multilateral development bank guidelines. Also shown is the average percentage of association countries that mainly use Quality-Based Selection procedures according to the FIDIC guidelines for consultant selection.

Average number of respondents: 31
(FIDIC associations: non-umbrella and umbrella).

