December 2009

SECTOR REVIEW

The Consulting Engineering and Architectural Groups. A Swedish and International survey.

The charts published in this Sector Review relate to figures from Annual Reports for 2008 and 2008/2009.

STD Svensk Teknik och Design

ARKITEKT- TEKNIK- OCH INDUSTRIKONSULTFÖRETAGEN I SAMVERKAN

Swedish Federation of Consulting Engineers and Architects

IN CO-OPERATION WITH

FRI The Danish Association of Consulting Engineers

RIF Association of Consulting Engineers, Norway

FRV The Icelandic Association of Consulting Engineers

SKOL The Finnish Association of Consulting Firms

ATL The Association of Finnish Architects' Offices

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Front cover:
Nominations for the Community Development Prize 2009
Upper left: Kiruna Pelletizing Plant 4 (Photo: Fredric Alm), Upper middle: ABB, Testing Hall, Ludvika (Photo: ABB), Upper right: Court of Appeal, Malmö (Photo: Torben Åndahl), Centre and below: Winning contribution, Hus Vänern, Karlstad University (Photo: Åke E:son Lindman)
For further information on the projects, see www.samhallsbyggardagen.se

Back cover:
Nominations for the Community Development Prize 2009
From the top down: Kiruna Pelletizing Plant 4, (Photos: Fredric Alm) (2 photos), Court of Appeal, Malmö (Photo: Torben Åndahl), ABB, Testing Hall, Ludvika (Photo: ABB)
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Frankfeldt Grafisk form AB
JNG Ainscough HB, translations
Intellecta Infolog, Solna 2009

Foreword

The Swedish Federation of Consulting Engineers and Architects (STD) is a sector and employers' organisation for Swedish architectural firms and engineering consultancies within the construction and industrial sectors. With almost 740 member companies, which together have over 28 000 employees, STD represents almost two thirds of the sector's resources.

STD's members develop and play a key role in the overall development of society, incorporating the construction of all types of buildings and urban developments, infrastructure, environment and climate systems – which are so important for society, energy and nature, as well as new products and processes for the manufacturing industry, etc. STD's member companies are involved in new development, innovations, conversion, maintenance and rationalisation, and create sustainable value.

Project managers, architects, engineering and industrial consultants investigate, plan, design and participate on the Swedish market in the development of fixed investments and products worth approximately SEK 320 billion per year. As a consequence, the sector influences the development of some 10 % of the country's GNP. The downswing within the sector over the past year is continuing, even though many companies are now beginning to show a little more optimism for the future. The order situation for all sectors is expected to level off during the winter and perhaps even show a slight upswing towards the middle of 2010. However, we must not forget the poor starting point faced by many of the sectors that are now expected to attract an increasing order volume. This applies in particular to our industrial consultants. It is consequently too early yet to start talking about a recovery. We can also see that individual developments in the financial world may have significant constraints on the recovery rate. The uncertainty lies in how quickly the volume of incoming orders will increase and what will happen to price levels, and at the same time how the cost structure will develop. There is also a certain degree of uncertainty about how the financial crisis – which we have yet to see the end of – will change the ground rules on the market.

The outcome could well be a paradigm shift with respect to both the recruitment of new employees and procurement/project forms. The sector must focus on customer benefit and more effective co-operation with market players. Competition, particularly on an international level, is increasing and the rationalisation of all production is a decisive factor. Consulting firms thus have an important role to play in the continued development of both society and industry. Through their knowledge, consultants contribute towards research, development and rationalisation activities. It is time for rationalisation and efficiency improvement to be given as firm a platform as possible now that we are beginning to see a gradual improvement in the economy. Efforts are already being made to create a society that is sustainable in the long term, and in this context STD's consultants have an important role to play.

The Sector Review is distributed to the member companies of the Swedish Federation of Consulting Engineers and Architects as well as to the other companies that take part in the survey. It is also distributed to influential client companies, journals, economic forecasters, corporate analysts, etc. as well as to Swedish embassies and export offices. This English version, the Sector Review, is distributed to other Nordic organisations and to those foreign companies that take part in our survey, as well as to international development banks, development organisations and administrations within the EU and to international journals.

The Sector Review is dependent for its existence on participation from a large number of companies both within and outside Sweden. We should therefore like to especially thank all those contributors who have helped to make this review possible.

Bent Johannesson
Managing Director of Ramböll Sverige AB
Chairman of the Swedish Federation of Consulting Engineers and Architects

Service sector spearheads recovery

A decrease in global production on the scale of that witnessed this year – over 2 per cent – has not been experienced in any recession since the 1980s. Previous downturns have instead tended to slow down, but have nevertheless shown a growth rate of just under 2 per cent, see graph below. Since Sweden's own growth is largely based on the production of export items, the change in the country's production pattern has to a large extent followed the demand and growth in other countries over the course of time. This year, Almega (employer and trade organisation for the Swedish service sector) calculates in its November assessment that Sweden's GNP will decrease by some 4.5 per cent this year, and gradually increase over the coming two years by 0.7 and 2.5 per cent respectively. This means a slow recovery in the production rate, and is explained by our assumption that it will take longer than usual for both exports and investments to pick up – a pattern that is common after deep financial crises.

The most acute period of financial unrest, lack of confidence in the banking system and resulting credit restrictions appears to be behind us, but more than half the total losses within the financial sector still remain to be written off, according to the IMF's latest assessment. Lending to, above all, companies has decreased in Sweden and other countries. We anticipate that lenders will continue to be more cautious in loans they make. New and stricter regulations with regard to how much equity the banks will need as a buffer to cope with any new losses can also be expected to lead to more cautious lending. A slow recovery in the economy and a continued restricted utilisation of corporate production resources will probably also mean that an upswing in production capital investments will be postponed.

The recovery in Sweden and other countries is largely a result of extensive financial and monetary policy incentives, and the fact that they can continue to function in the economy. Various "exit" strategies have on the other hand been discussed since the summer, and in certain individual countries – such as Australia and Norway – the central banks have already begun to raise the key interest rate, since the economy has begun to recover more quickly there than in other countries.

In Sweden, the Riksbank (Sweden's central bank) still plans on keeping the repo rate at its record low level of 0.25 per cent, at least until October 2010. Almega views the situation differently, and anticipates that the high pressure on costs within the business sector will help to increase inflation pressure. In addition, households have begun to consume more this year, which will make it easier to raise prices within the field of commerce. We therefore expect the Riksbank to begin raising the repo rate as early as July next year, and to continue raising it gradually so that by the end of 2011 it will have reached 3 per cent.

Development in Sweden is currently characterised by a unique sequence of events, in which the service sector is spearheading the recovery in the economy. Following the significant drop in service production during the last quarter of 2008, production has begun to increase, whereas it continued to drop for commodity producers up to and including the third quarter this year. In the case of the manufacturing industry, the statistics we are receiving now from Statistics Sweden indicate that production began to swing slightly upwards during the second quarter, from a significantly deeper low point than in the case of the service producers. Almega estimates in its forecasts that industrial production will fall by 19 per cent between 2008 and 2009, whereas service production will decrease by a little over 2 per cent.

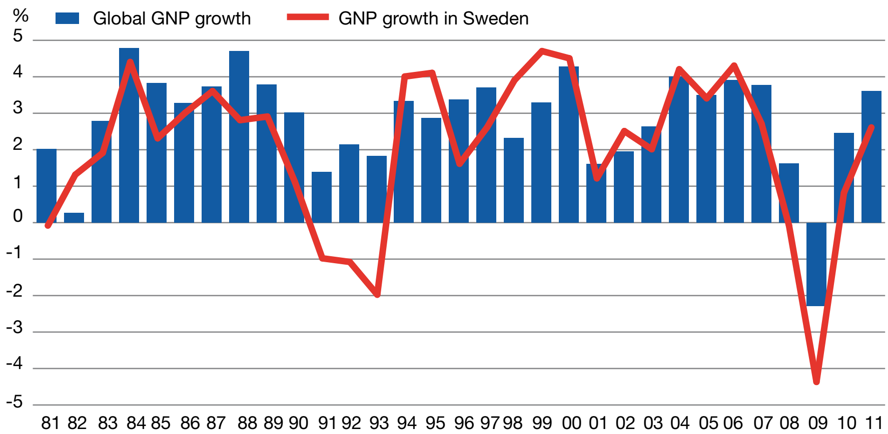
The fact that the service sector is the first area to emerge from the recession is explainable on the one hand by the incentive measures that have favoured service companies, but also by the fact that demand has been maintained from sectors other than industry. As regards building investments, we anticipate an increase in both public and private construction investments, with a total of approximately 10 per cent both this year and in 2010. This increase is explained, among other things, by private investments in the energy sector, above all within wind power and CHP. A major contribution is also being made from continued investments in public infrastructure. On the other hand, there has been a significant downturn in housing construction this year by approximately 25 per cent. We judge, however, that there will be an upswing in these investments next year. Continued low mortgage rates, a growing housing demand and the fact that housing prices are beginning to rise are all factors that support this forecast. Investments in building conversion are also expected to increase, not least as a consequence of tax deductions that can be made for repair and conversion works.

The demand from households, the public sector and the export market has thus displayed a relatively positive trend for certain service sectors. Service exports have also maintained a fairly positive level. Almega estimates that they will only decrease by 1 per cent this year, compared with a downturn of over 21 per cent for commodity exports.

The positive development for the service sector as well as leading indicators suggest that employment in the service sector will also be maintained at a much healthier level than within industry. In its forecast, Almega expects the number of people employed in the private service sector to decrease by a total of 35 000 over the period 2009-2011, whereas in industry the number of people employed is expected to drop my as many as 120 000. The number of unemployed expressed as a proportion of the labour force is expected to reach 9.5 per cent in 2011.

Lena Hagman,
Almega's Senior Economist, December 2009

GNP growth in Sweden and the world, 1981-2011, fixed prices, percentage change



Sector development in 2008 and 2009

2008 was another record year for the sector. The long backlog of orders meant that the high capacity utilisation levels could be largely retained throughout the year, despite the financial crisis, downswing in the economy and overall feeling of pessimism. The picture is not the same everywhere, however. The industrial engineering consultancies were affected at an early stage by a significant decrease in demand, above all within the car industry.

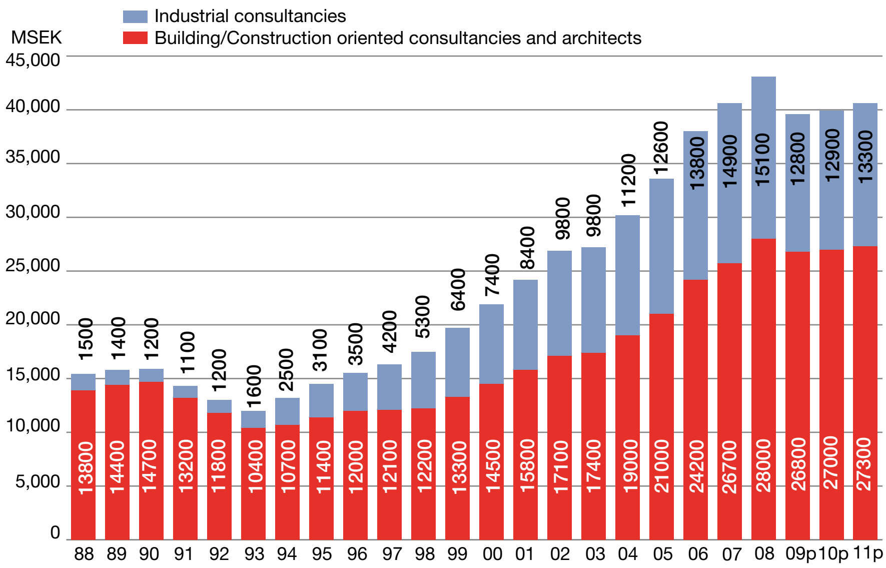
Key business ratios

Turnover within the sector amounted to approximately SEK 43 billion (compared with just over SEK 40 billion in 2007) and the number of employees to just under 43 000, basically unchanged compared with 2007. The turnover per employee thus increased to approximately SEK 1 005 000 compared with SEK 930 000 in 2007. The profit margins for the 300 largest architect firms, engineering consultancies and industrial engineering consultancies in the sector increased still further during the year to 7.4 % from 6.8 % in 2007. The profit margin among architectural firms amounted to 9.4 %, engineering consultancies to 9.1 % and industrial engineering consulting firms to 4.3 %. Despite the onset of the financial crisis during august 2008, the companies together showed healthy development.

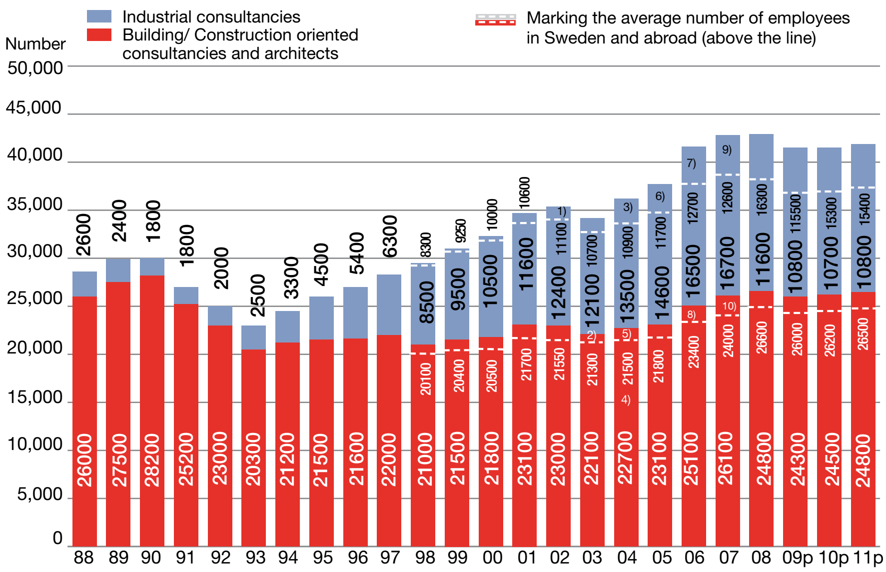
Age and gender structure

The percentage of women among the employees in the Swedish Federation of Consulting Engineers and Architects member firms amounted during 2008 to 27.4 %, which is an increase since 2007 when the proportion of women was 26.0 %. The figures come from the Confederation of Swedish Enterprise salary statistics, and include all the employees (almost 28 000) in its member companies. The salary statistics also show that the average age of the member company employees is approximately 42. It should be remembered, however, that the statistics only apply to people between the ages of 18 and 64. In other words, employees older than 64 fall outside this figure. There are, of course, many employees in the sector who are over 64, which means that the average age is probably somewhat higher.

Turnover in the Sector, MSEK



Average number of employees in the Sector



[1] Contribution with some 900 man-years with Teleca acquiring AU-system.

[2] Reduction with some 900 man-years (in Norway and Finland) after Rambølls acquaring Scandiaconsult AB.

[3] Contribution with some 1100 man-years after SWECO acquiring PIC Engineering and ÅFs acquisition of CTS Engineering.

[4] Contribution with over 100 man-years after ÅFs acquisition of Fortum Teknik & Miljö.

[5] Contribution with over 300 man-years after SWECO acquiring Statkraft Grøner

[6] Contribution with some 100 man-years after Rejler Group acquiring remaining shares of Rejlers Invest Oy.

[7] Contribution with some 500 man-years after Teleca´s acquisition of russian Telma and part of ÅF:s acquisition of Enprima.

[8] Contribution from among others part of ÅF:s acquisition of Enprima and SWECO´s acquisitions in the Baltic States.

[9] Contribution from among others with some 800 man-years after Semcon acquiring IVM Automotive. Reduction after Teleca´s divesting AU System with some 400 man-years abroad and 900 in Sweden.

[10] Contribution with over 300 man-years after SWECO´s purchase In the Baltic States and Czech Republic as well as White acquiring Danish hs.ark A/S (2006).

The development within the Sector

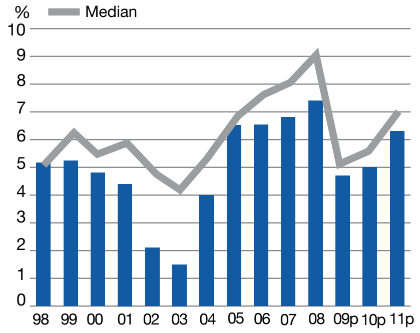
	Turnover per employee, SEK thousand										Result after financial items per employee, SEK thousand									
	02	03	04	05	06	07	08	09p	10p	11p	02	03	04	05	06	07	08	09p	10p	11p
The top 300 groups	869	865	928	962	970	1021	1034	985	994	1003	18	13	37	60	63	69	77	46	50	63
of witch building construction oriented	906	871	952	992	1034	1102	1139	1110	1115	1120	37	37	45	69	79	98	104	78	79	88
of which architect firms	878	888	941	962	986	1046	1093	982	968	990	40	39	55	71	88	102	103	66	65	75
engineering consultancies	912	867	955	999	1042	1114	1148	1141	1142	1142	35	37	43	69	78	97	104	80	81	91
industrial consultancies	819	854	889	910	888	915	884	710	812	828	-7	-25	28	44	39	32	38	2	11	27

*) until 2002 the 200 largest companies

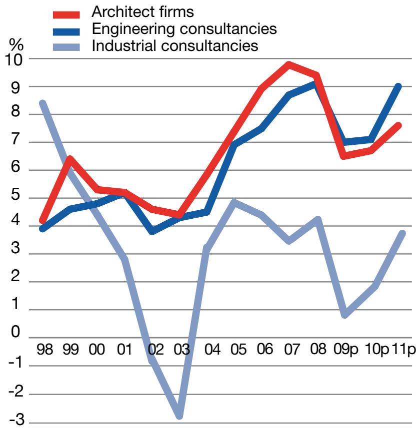
from 2004 when available, according to IFRS

Source: Swedish Federation of Consulting Engineers and Architects (STD)

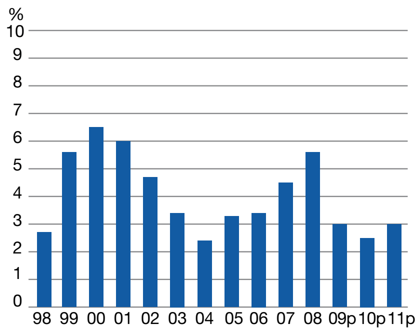
Result margins in the top 300 groups



Result margins



Payroll cost/employee (fte)



Source: Swedish Federation of Consulting Engineers and Architects (STD)

Investments

Building investments in Sweden amounted in total to SEK 261 billion in 2008 (according to Statistics Sweden, SCB), which corresponds to an increase of 5.7 % from SEK 247 billion in 2007. Housing investments decreased by 11 % to SEK 93 billion, whereas investments in infrastructure and other facilities increased by 12 % to SEK 72 billion. Investments in other buildings (offices, business premises, etc.) increased by 15 % to SEK 83 billion. The forecast for 2009 is that housing investments will continue to drop, by just over 20 %, but that investments in the infrastructure sector are expected to increase.

Industrial investments in machinery and equipment during 2008 amounted to approximately SEK 58 billion, an increase of 7 % compared with 2007. However, they are expected to decrease by 22 % during 2008 and then either stabilise or undergo a weak recovery in 2010.

Development during the year

During 2008, the sector has continued to grow and new record levels have been achieved. Both the sector's turnover and, to a lesser extent, the number of employees increased compared with 2007. The profit margins also improved somewhat. Despite the financial crisis and the downswing in the economy, the healthy development of recent years continued. Most firms continued to enjoy a healthy volume of orders in hand coupled with a high level of capacity utilisation. Within industry, however, consultants were at an early stage hit hard by the financial crisis and the sudden decrease in demand in Sweden and other countries, above all consultancies in the motor vehicle sector.

Sensitivity analysis

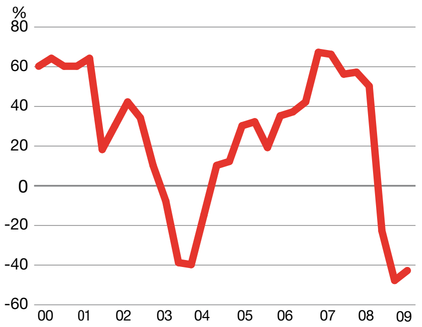
With all other factors remaining unchanged, the profit before tax is changed by:

Capacity utilisation	+/-	1%-unit	SEK 12-13 000/employee
Price	+/-	1%	SEK 10 000/employee
Payroll cost	+/-	1%	SEK 7 000/employee

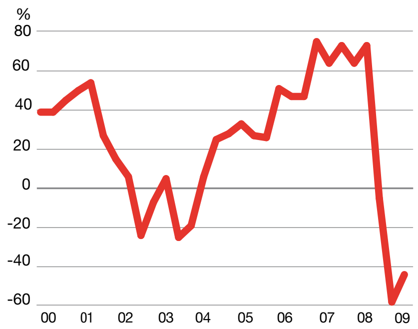
At the turn of the year and in spring 2009, the demand also began to drop for architects and engineering consultants. However, the downswing was cushioned by the extensive incentive packages which have helped to secure continued healthy development within, above all, the infra-

The Group’s opinion about the development of the price situation

Architects and Consulting Engineers



Industrial Consultants

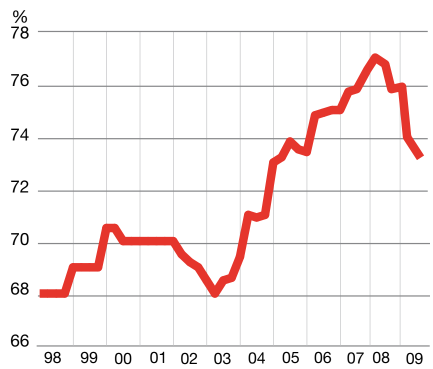


Source: Swedish Federation of Consulting Engineers and Architects (STD)

structure sector, but also within the areas of power and energy, and environmental projects.

However, our member firms are now beginning to signal a somewhat more positive outlook. The order situation for all sectors is expected to even out during the autumn and winter, and perhaps even swing slightly upwards towards mid-2010. We must not, however, forget the weak starting point facing many of the sectors that are now expected to experience positive development. It is too early yet to talk about a recovery. The order situation is not the only parameter that has suffered during the recession. The price situation is another factor, and there has been heavy pressure on prices in many sectors. In order to regain profitability in the sector, it must be possible to raise prices in the future and control costs. So there is a little further to go before we can start talking about a recovery, although to judge by the signals we are receiving we are now well on the way.

Rolling annual billing ratio



Development situation for architects

The order situation for architectural firms has continued to cause concern during the summer as a consequence of the decreasing investments in housing, other buildings (offices, shops, hospitals, etc.) and industrial buildings. The development of new housing this year is expected to amount to 15 000 commenced apartments, which is a third of the 45 400 units in 2006. Architectural firms are now beginning to indicate that there could be an improvement on the housing side, with an increase in incoming orders during 2010. But the increase will probably be small. The forecast (according to SCB) for new construction during 2010 is just under 16 000 commenced apartments.

In the important segment of other buildings (offices, commercial buildings, entertainment and public premises) the downswing is also expected to level off and perhaps even swing slightly upwards during the course of 2010. It is above all in the area of public premises that increased investment is expected to take place.

Development for engineering consultancies in construction and civil works

The engineering consultancies in the construction and civil works segment are reporting a relatively unchanged situation during the autumn period. Many of the companies that work in the infrastructure sector, for public sector clients, with energy and power plants and with environmental projects, fall within this group. These areas have benefited from the numerous incentive packages, and the volume of incoming orders in these segments is continuing to grow. This has meant that the total order situation for engineering consultancies has not been hit as hard by the downswing in the economy as it has for architects and industrial consultancies. The incoming orders for infrastructure, energy and power facilities, and environmental surveys is expected to continue to rise, but there is now also a more positive outlook in the other areas. For example, other buildings (offices, commercial buildings, entertainment and public premises) are expected to increase during the spring.

Development for industrial engineering consultancies

For the industrial engineering consultancies, the order situation has further deteriorated somewhat during the autumn, following the rapid negative development during autumn 2008 and spring 2009. At the same time as the demand for consultancy services has decreased, there has been heavy pressure on prices, which has had a significant impact on the level of profitability within the sector. It is above all the vehicle industry and the important production and process development segment that have been hit hardest by the recession.

Now, however the outlook appears to be brighter. The companies feel confident of an improvement in the order situation during the winter and spring. It is above all within the sub-sectors of production and process development, and product development that the order situation can be expected to improve. But it should not be forgotten that these are also segments that have lost a lot in terms of order volume since September 2008. At the same time, the order situation appears likely to level off during the autumn and winter, and perhaps even swing slightly upwards during the spring.

Structural business

The volume of corporate business in 2009 has continued to drop. In 2007, business levels were record high, but decreased during 2008.

Swedish corporate events

In May, Sweden's foremost engineering and architectural group, SWECO, increased its involvement in Östersund and Jämtland-Härjedalen on the one hand by growing in established business areas and on the other through the acquisition of Nilsson Byggkonsult AB, which has been represented on the market for 20 years. SWECO now employs some 80 architects and engineers in the region.

During the autumn, SWECO strengthened its position in the energy area through the acquisition of EME Analys AB. The company was founded 15 years ago and has had the Nordic countries as its operational base. The six employees will join SWECO's energy market group, which will initially have 15 staff. The acquisition is strategically important for growth on the international market within the electricity and energy area. "SWECO's corporate acquisitions have during recent years primarily involved smaller companies in the Nordic and Baltic countries, and often companies SWECO has worked with in the past. In future, acquisitions will be focused on larger companies in Great Britain, The Netherlands and Germany", said Mats Wäppling to Byggindustrin in October.

During the summer, SWECO was awarded a major commission in conjunction with investments made by Jordan in improving the supply of drinking water to the capital Amman. The order is worth SEK 130 million and is one of the largest commissions acquired to date in the environmental area.

ÅF – a popular employer continues to expand

ÅF, Sweden's second largest engineering consultancy, was ranked during the year as Sweden's second most popular employer, in all categories, by professional active engineers, according to the 2009/10 Career Barometer.

In December 2008, ÅF acquired Russian engineering consultancy ZAO Lonas Technologija with 240 employees working in offices in St Petersburg, Jekaterinburg and Kiev. The company specialises in design and turnkey projects for power and CHP plants as well as turbine plants, and has a broad client base in both the private and the public sectors. The acquisition strengthens ÅF's position as an energy consultant in Russia and the strategy is to continue with expansion in Russia and the CIS countries.

ÅF has via its ÅF Inspection Division established a new wholly-owned subsidiary in Lithuania, UAB AF Inspection LT. The company will initially focus its operations on testing and inspection for the nuclear power industry and will take over 30 employees from the state-owned company Ignalina Nuclear Power Plant. UAB will in the future also offer inspection services outside the area of nuclear power.

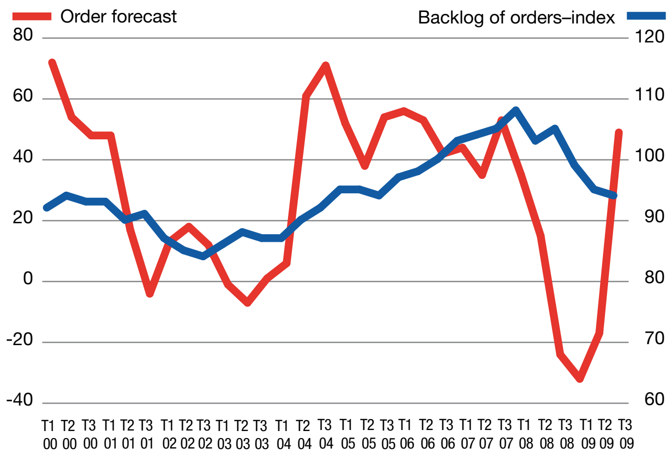
During November, the Engineering Division of ÅF made two minor acquisitions in Gothenburg and Malmö. In Malmö, 14 consultants specialising in the areas of industrial automation and project management have been taken over from Etteplan. The acquisition also provides new clients for operations in the Malmö region and increases the number of ÅF consultants in the region to approximately 250. In Gothenburg, ÅF has taken over 13 consultants specialising in industrial automation and project management from Elektroautomatik, which will contribute with greater competence and new customers. ÅF's operations in the Gothenburg region now comprise the work of some 350 consultants.

ÅF has a strong financial situation and plans for continued growth. The long-term objective is to expand by 15 % per year. Corporate acquisitions will mainly take place in the areas of energy, energy rationalisation and community development.

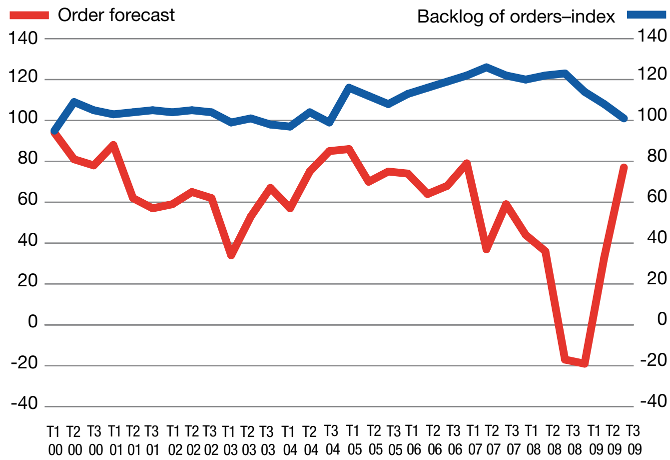
Semcon has made staff cuts in order to adapt its operations to the reduced demand from the vehicle and manufacturing industries in Sweden. Approximately 600 consultants have been forced to leave their posts since the beginning of the financial crisis in autumn 2008. Cuts have also been made in Rüsselsheim and Munich in Germany in order to tailor operations to the prevailing market situation. But there is also good news from

Backlog of orders – index compared with orderforecast in six month´s time

Architects and Consulting Engineers weighted togeth

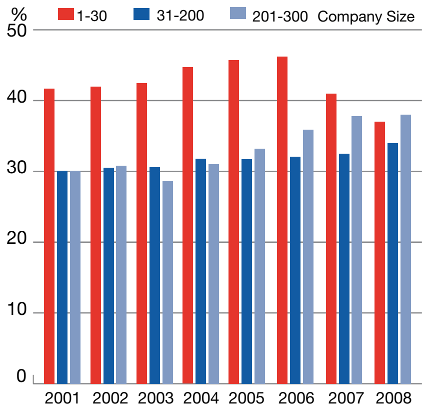


Industrial Consultants



Source: Swedish Federation of Consulting Engineers and Architects (STD)

Equity ratio, %



The top 30 Swedish groups

	Turnover per employee, kSEK						Result after fin. items/employee, kSEK					
	03/04	04/05	05/06	06/07	07/08	**08/09**	03/04	04/05	05/06	06/07	07/08	**08/09**
The top 30	857	918	956	949	1009	**1016**	3	32	61	54	58	**69**
groups of which building/ construction oriented	850	939	1010	998	1106	**1101**	29	36	81	75	87	**101**
industrial	902	839	902	905	908	**912**	-31	26 [1]	41	34	28	**34**

[1] 13 kSEK before IFRS

Source: Swedish Federation of Consulting Engineers and Architects (STD)

the German market. Semcon has been selected by a German vehicle manufacturer to serve as a development partner in the feasibility study for a new concept car – an order that will generate some SEK 50 million during 2009. Semcon Project Management has acquired a small German company, Triple-Constraint, and has strengthened its position in the project management field in Europe.

Tyréns is expanding in Gothenburg through the acquisition of Projektteamet Västsvenska AB, with some 30 employees and an annual turnover of almost SEK 29 million in 2008. This purchase strengthens Tyrén's position as one of the major players in building design in the Western Region. In September, the company expanded in Västerbotten through the acquisition of QTENT Konsult AB. QTENT operates in the field of earthworks and civil engineering design, and had a turnover in 2008/09 of just over SEK 4 million.

White arkitekter has during the year enjoyed major success on the international market. The firm will take part, among other things, in the extensive renovation of the historic city centre of Tianjin in China, with some 10 million inhabitants. Furthermore, a housing area will be developed with a pronounced sustainability profile in the Polish city of Szczecin and a Hammarby Sjöstad-inspired housing area in the Norwegian city of Bergen.

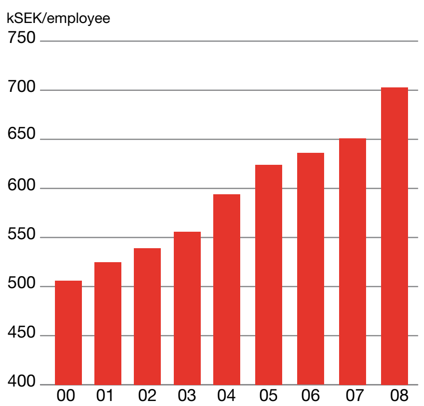
White arkitekter continues to win ground in Norway, where they were recently awarded a commission to design a new upper secondary school in Tønsberg valued at NOK 568 million. The commission is the company's third school project in Norway. They have also won the contract for an energy-smart housing area in Tønsberg.

With French enterprise Alten Group as its new owner, Xdin is concentrating its efforts on becoming stronger in the Nordic countries, among other ways by setting up a new office in Lund to strengthen its presence in the Öresund region. During the course of the year, a framework agreement has been entered into with Vattenfall with respect to the nuclear power industry.

Epsilon expanding in the energy sector

Epsilon has also signed a framework agreement with Vattenfall. The agreement, worth some SEK 100 million, is for engineering consulting services within the nuclear power industry, wind power and hydro power. In Norway, a three-year framework agreement has been entered into with Statnett for IT services. Epsilon will also be one of the main suppliers

Added value for the 300 largest groups



Source: Swedish Federation of Consulting Engineers and Architects (STD)

Turnover/employee

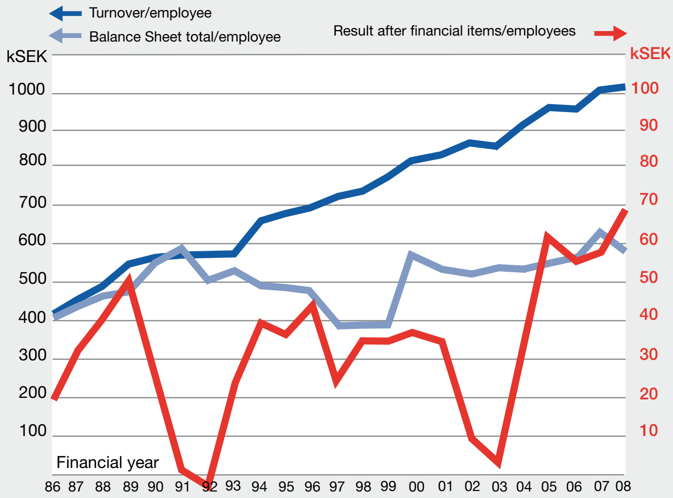
(in SEK thousand)	2008	2007	2006	2005	2004	2003	2002	2001	2000
Management consultants	**2015**	2075	1800	1820	1720	1630	1600	1490	1825
IT consultants (adm.)	**1270**	1440	1135	1170	1140	1000	1130	1040	1020
Lawers' offices	**1730**	1750	1655	1595	1485	1485	1480	1610	1300
Market surveyors	**1355**	1280	1085	1070	985	895	900	990	1035
Public relations and communication	**1320**	1285	1265	1170	1120	1020	1020	1050	1350
Auditors *)	**1230**	1250	1250	1135	1050	970	880	920	890
and as per our table on page 8									
Industrial engineering consultants	**912**	908	905	902	893	866	823	824	779
Architects/building engineering consultants	**1101**	1106	998	1010	939	850	897	835	823

*) based on the major 10 alone

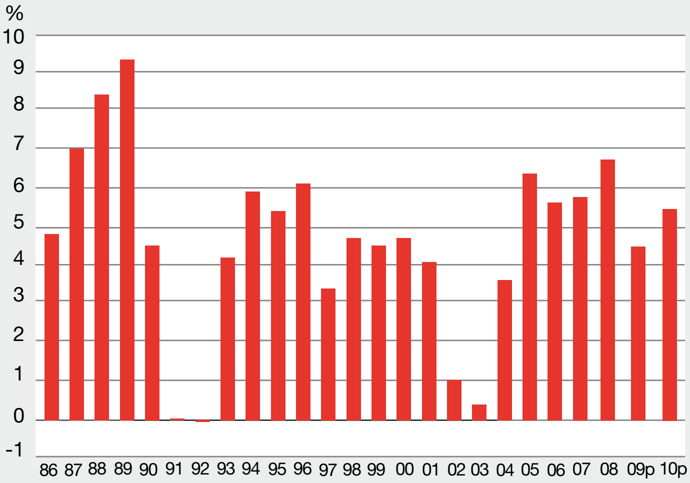
It is interesting to make a comparison with other knowledge sectors with highly qualified staff. The following comparative figures from 30-50 largest companies in several sectors are taken mainly from the magazines Affärsvärlden and Veckans Affärer.

Source: Swedish Federation of Consulting Engineers and Architects (STD)

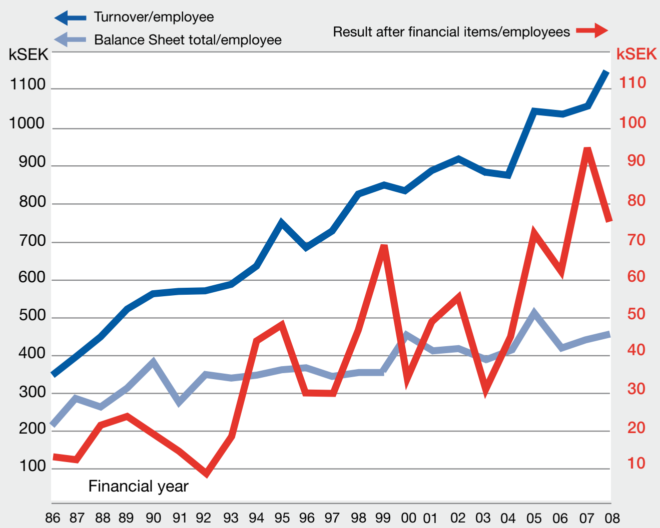
The top 30 Swedish groups



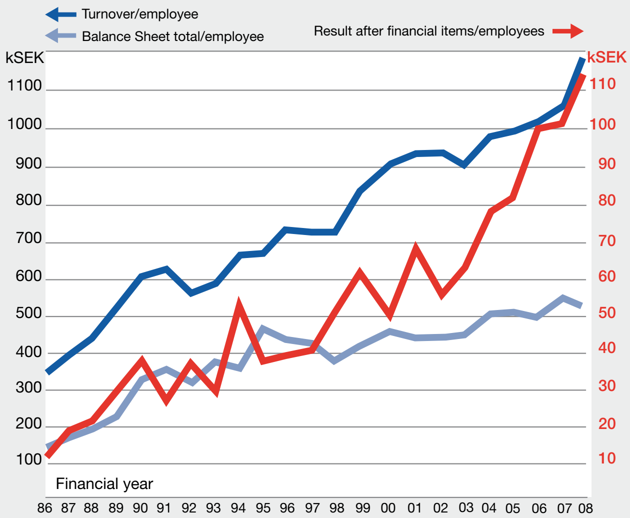
Result margins in the top 30 groups



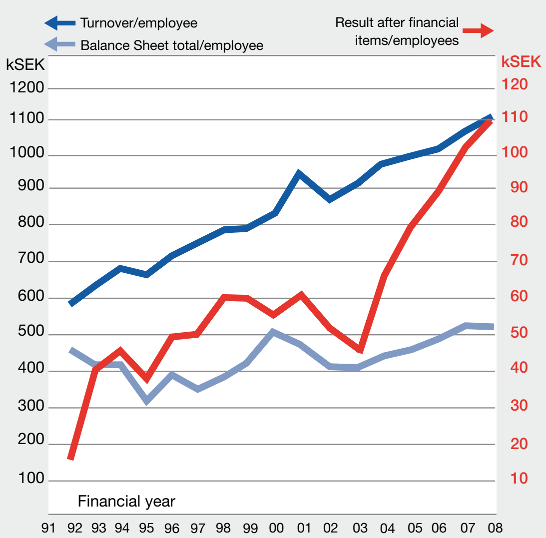
Group nr 31-50



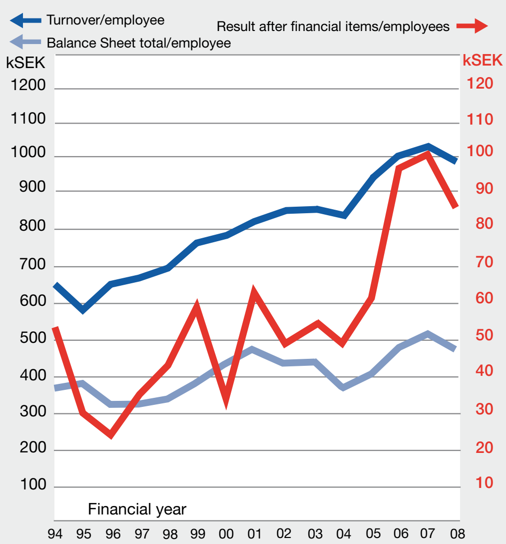
Group nr 51-100



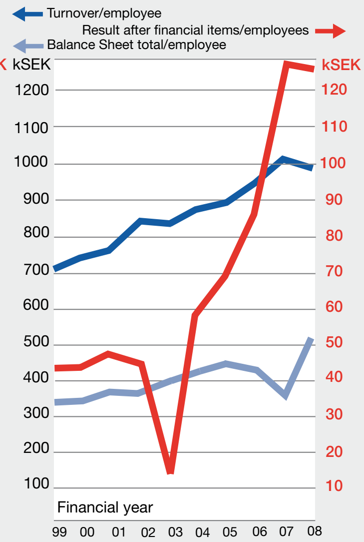
Group nr 101-150



Group nr 151-200



Group nr 201-300



Source: Swedish Federation of Consulting Engineers and Architects (STD)

The top 50 groups within industrial engineering

			Group	Annual Report	Turnover MSEK	(previous year)	Em-ployees
STD	1	2	Semcon AB	08	3298,8	2497,4	3631
STD	2	1	ÅF-Divisions (Energy & Engineering)	08	2478,0	2518,0	1944
STD	3	4	Epsilon AB	08	1158,1	1043,4	1094
STD	4	3	Teleca AB	08	1022,7	1310,8	1874
STD	5	5	SWECO Industry	08	993,0	901,7	1110
STD	6	6	Etteplan Sverige (proforma)	07	671,4	217,0	876
	7	8	Xdin AB (Alten Groupe Nov 2008)	08	412,5	379,3	490
STD	8	9	Pöyry Sweden AB	08	341,9	308,2	332
STD	9	7	Rejlers (delar av)	08	265,9	651,0	298
STD	10	10	FB Engineering (purchased by COWI AB, July 2009)	08	235,0	200,0	225
STD	11	11	Avalon Enterprise AB	08	214,3	179,5	222
STD	12	13	Infotiv AB	07/08	179,8	147,2	228
STD	13	12	Knightec AB	08/09	165,7	173,9	200
STD	14	14	Consat Engineering AB	08	160,5	147,2	170
STD	15	15	Condesign AB	08	147,2	139,8	214
STD	16	23	Eurocon Consulting AB	08	143,2	70,9	87
STD	17	16	Centaur Segula Tech AB (Groupe Segula Techn. SA)	08	107,9	125,3	144
STD	18	22	Elator AB	08	100,2	72,6	62
STD	19	21	Rücker Nord AB	08	93,8	76,9	99
STD	20	24	PRC Engineering AB	08	86,6	65,5	56
STD	21	29	Fasitet PDE AB (holländska PDE Automotive BV)	08	85,1	84,8	64
STD	22	20	Råbe Industrikonsult AB	07/08	79,6	79,6	71
STD	23	19	IKG – koncernen	08/09	78,0	84,0	90
STD	24	17	Creator Teknisk Utveckling AB	May-Dec 08	68,8	93,4	86
STD	25	32	Automations Partner AB	08	67,5	40,4	28
STD	26	25	WSP Systems	08	55,0	55,0	55
STD	27	28	Ergonomidesign AB	07/08	52,4	46,2	51
STD	28	33	Solvina AB	07/08	51,4	38,6	32
STD	29	29	HRM/Ritline AB	07/08	48,7	44,9	67
STD	30	–	AcobiaFlux AB	08	47,0	37,9	35
STD	31	26	Goodtech Solutions Karlstad (fd Wermtec)	08	45,1	53,5	43
STD	32	35	Koteko AB	08	38,4	36,1	27
STD	33	34	Cross Design i Göteborg AB	08	37,9	36,4	42
STD	34	37	FS Dynamics AB	08/09	37,7	33,5	43
STD	35	36	IP Industri & Projektconsult AB (köpt av E.On augusti 2009)	07/08	37,0	35,9	38
STD	36	39	Järnvågen AB (Bergström, BEKAB, Indautomat m fl)	08/09	33,3	39,2	40
STD	37	40	Prows AB, Industriell Process & VVS	07/08	31,6	29,3	35
STD	38	44	Pidab Instrumentdesign AB	07/08	30,6	25,4	29
STD	39	42	Fagerström Industrikonsult AB	08/09	28,5	26,4	21
STD	40	38	Danatec AB (Rejlerkoncernen Aug 2008)	08	28,2	32,9	42
STD	41	43	Camatec Industriteknik AB	08/09	27,2	25,6	32
STD	42	45	Bertrandt Sweden AB	07/08	26,9	23,1	24
STD	43	46	Deva Mecaneyes AB	08	25,5	20,8	28
STD	44	47	TKG Teknikkonsultgruppen AB	08	24,9	20,3	18
STD	45	–	Konsultgruppen i Bergslagen AB	08/09	23,6	22,1	15
STD	46	–	Devellum Design & Development AB	08	22,4	15,5	18
STD	47	48	Rördesign i Göteborg AB	08/09	21,3	19,6	25
STD	48	27	KPA Engineering AB	jul-dec 08	21,2	48,0	62
STD	49	–	Umeå Industri & Kraft Konsult AB	08	20,6	16,0	15
STD	50	41	Relitor AB (f d Luleå Industriteknik AB)	08	19,3	27,2	17

STD = Member of the Swedish Federation of Consulting Engineers and Architects. In the 2008/2009 the top 50 groups had a turnover of 13456 MSEK (previous year 12 677 MSEK). The average number of employees (FTE) was some 13456 (13812) and the turnover per employee was kSEK 926 (918).

Source: Swedish Federation of Consulting Engineers and Architects (STD)

of engineering consultancy services for the energy company E-On up until June 2011.

Epsilon has also been appointed as the prioritised supplier of engineering consultancy services for a world leader in the pharmaceuticals sector.

Norway's leading engineering consultancy, Norconsult, expanded in Sweden during the year through the acquisition of Mecad AB and Mark and Vatten Ingenjörerna AB. Mecad AB, with offices in Piteå, Luleå and Stockholm, has 29 employees and offers services in the fields of earthworks, energy, HIVAC, process and industrial engineering, and IT. Mark och Vatten Ingenjörerna AB in Växjö has 10 employees and is active in the water supply and wastewater sector.

Tengbom has purchased Alpha Architects with operations in Sweden and Russia. Alpha Architects is involved in architecture and planning in the areas of trade and commercial real estate. The transfer came into effect on 1 November.

Hifab Group has been selected by Banverket for three framework agreements involving ground investigations all over the country, valued at approximately SEK 25 million each. The agreements run until the end of March 2011 with the option for an additional year. An agreement for construction and project management services for 70 planned restaurants over the next four years has been signed with Max Hamburgerrestauranger AB. Together with Pöyry, the subsidiary Hifab International has been commissioned to direct the construction of a water tunnel in Nepal, worth a total of some EUR 6 million. In Liberia, the company has signed a contract with the Ministry of Public Works for a SIDA-financed infrastructure project for the reconstruction of rural roads. The project runs until April 2012 and is strategically important in that it could open the door for more commissions in the country.

The Rejler Group had its best year to date in 2008, and is approaching its specified goal of 1000 employees and SEK 1 billion in turnover. Turnover amounted to just under SEK 800 million and the number of (permanently) employed to just under 900. Rejlers Energitjänster has during the year signed an agreement with Statoil for the management of invoicing in Sweden and thereby strengthening its position as Sweden's foremost provider of services for electricity supply and

The top 50 arcitectural groups

			Group	Annual Report	Turnover MSEK	(previous year)	Em-ployees
STD	1	1	White arkitekter AB	08	495,8	450,1	466
STD	2	2	SWECO Architects AB	08	494,2	422,1	368
STD	3	4	Tengbom	08	174,2	129,0	182
STD	4	3	Temagruppen Sverige AB	08	165,5	142,6	157
STD	5	5	Wingårdh-koncernen	08	139,2	103,4	116
STD	6	7	FOJAB Arkitekter AB (koncernen)	08/09	139,1	163,9	79
STD	7	6	NYRÉNS Arkitektkontor AB	08	104,1	78,1	91
STD	8	*21	Arkitekterna Krook & Tjäder AB	08	76,5	73,5	85
STD	9	8	Brunnberg & Forshed Arkitektkontor AB	08	71,6	67,3	59
STD	10	10	Liljewall Arkitekter AB	08	66,9	57,3	60
STD	11	16	AROSgruppen Arkitekter AB	07/08	66,4	66,4	63
STD	12	14	AIX Arkitekter AB	08/09	65,6	56,2	62
STD	13	12	ÅWL Arkitekter AB	08/09	60,2	53,8	47
STD	14	27	BSK Arkitekter AB	08	59,0	33,9	41
	15	13	Strategisk Arkitektur Fries & Ekeroth AB	08	55,8	53,7	50
STD	16	20	Equator Stockholm AB	08	47,1	40,7	40
STD	17	26	Reflex Arkitekter AB	07/08	44,9	34,0	47
	18	19	Wester+Elsner Arkitekter AB	08/09	44,6	45,6	37
STD	19	15	Scheiwiller Svensson Arkitektkontor AB	08/09	41,0	48,9	37
STD	20	49	Anders Bergkrantz Arkitekter AB	08	40,6	20,2	18
STD	21	34	Semrén & Månsson Arkitektkontor AB	07/08	39,7	29,9	39
STD	22	11	Arkitekthuset Monarken AB	08/09	39,6	56,1	42
STD	23	23	BAU Arkitekter AB	08	37,6	35,4	42
STD	24	24	Mondo Arkitekter AB (fusion with FRS Architechts, March 2009)	08	35,9	35,1	42
STD	25	41	Berg Arkitektkontor AB	08	34,7	23,3	23
STD	26	30	AQ Arkitekter i Eskilstuna AB	08/09	34,2	31,3	27
STD	27	33	AG Arkitekter AB	08	32,6	29,9	32
STD	28	25	SYD ARK Konstruera AB	08/09	32,3	34,3	34
STD	29	17	Arkitektbyrån AB i Göteborg	08	32,0	42,1	37
STD	30	36	Archus Arosia Arkitekter AB	08	30,3	29,3	30
STD	31	32	MAF Arkitektkontor AB	07/08	29,9	29,9	25
STD	32	38	Thomas Eriksson Arkitektkontor AB	08/09	29,9	33,7	31
STD	33	9	Link Arkitektur AB	08	29,7	66,4	66
STD	34	40	Studio 1.11 Arkitekter AB	08	28,6	23,7	21
STD	35	44	SAMARK Arkitektur & Design AB	08	27,5	22,9	24
STD	36	37	Lund & Valentin Arkitekter AB	08/09	27,5	29,1	34
STD	37	31	Landskapsgruppen Göteborg AB	07/08	27,0	30,9	28
STD	38	50	Erséus Arkitekter AB	08	25,1	20,0	23
STD	39	46	BSV Arkitekter & Ingenjörer AB	08	24,7	24,7	30
STD	40	29	A5 Arkitekter & Ingenjörer AB (Tengbom dec 2008)	May-Dec 08	24,5	34,7	41
	41	39	ABAKO Arkitektkontor AB	08	23,5	24,3	29
STD	42	–	Arkitektgruppen G.K.A.K AB	08	23,0	19,6	21
STD	43	–	BBH Arkitekter & Ingenjörer AB	08	22,7	18,1	15
STD	44	–	Rosenbergs Arkitekter AB	08	22,5	17,9	23
STD	45	–	Carlstedt Arkitekter AB	08	22,3	18,4	22
STD	46	43	Murman Arkitekter AB	08	21,8	23,0	26
	47	28	A&P Arkitekter AB (Ahrbom & Partner)	08	21,6	32,3	20
STD	48	–	Contekton Arkitekter Fyrstad AB	07/08	20,8	16,3	20
STD	49	–	METRO Arkitekter AB	08/09	20,2	18,8	21
STD	50	–	Ahlqvist & Almqvist Arkitekter AB	07/08	20,1	19,0	18

STD = Member of the Swedish Federation of Consulting Engineers and Architects. In the 2008/2009 the top 50 groups had a turnover of 3 294 MSEK (previous year 2 871 MSEK). The average number of employees (FTE) was some 2991 (2472) and the turnover per employee was kSEK 1 101 (1 066).

The chart above only covers those groups in which architectural operations predominate.

Source: Swedish Federation of Consulting Engineers and Architects (STD)

network companies. Rejler has also once again been entrusted with managing the network services on behalf of Fortum Distribution, which it has done since 2000. The agreement runs for two years with the option of a further two years. Rejlers' Finnish subsidiary was commissioned by Fortum Power and Heat Oy to provide all the electrical engineering for a 30 MW district heating plant, worth over SEK 10 million. In Norway, Rejlers AS has signed a contract with Nokia Siemens Network for front office services in NSN's network monitoring centre in Oslo, which is in line with its strategy to grow within telecom, energy and environmental engineering in Norway. Rejlers Energitjänster has been chosen by Vattenfall Norden Försäljning AB to be a partner in its efforts to sell electricity services in Norway.

Vectura, new on the track

Vectura Consulting AB commenced operations on 1 January 2009 through a merger of Vägverket Konsult and Banverket Consulting, and is the market leader in transport infrastructure. The new company has had a good start and the turnover for the first three quarters was approximately SEK 770 million, with an operational result of just over SEK 50 million. During the course of the year, a branch office was also opened in Copenhagen in order to invest in the Danish market, where in the past the company conducted projects on behalf of Banedanmark and Trafikstyrelsen. October saw the acquisition of Railize International AB, which is concerned with strategic planning, conceptual studies, feasibility studies and surveys for, above all, the railways. Railize has 10 employees and in 2008/09 had a turnover of SEK 7 million and strengthens Vectura's competence in the rail sector with its aim to introduce high-speed railway lines in Sweden.

SWEPRO is merging with the Norwegian firm PTL (Prosjekt- og teknologiledelse AS) and forming one of the leading companies in the Nordic area for professional project management for construction, civil works, energy and operational development. The new company, with its registered offices in Trondheim, will have some 320 employees and a turnover of just over SEK 400 million. The new CEO will be SWEPRO's current Managing Director Miguel Guirao.

A comparision between some international listed Consultancies. Key ratios per latest reported fiscal year.

Group		Market value 2009-10-31 MEUR	Market value MEUR	Turn-over MEUR	Average number of employees	Turnover/ employee kEUR	Result before tax MEUR	Result before tax/ employee kEUR	Result margin %	Market value/ employee kEUR	P/e	P/s
Semcon	SE	531	210	3299.0	3631	909	92.2	25.4	2.8%	58	6.05	0.06
ÅF AB	SE	3 033	2022	4568.8	3948	1157	460.9	116.7	10.1%	512	10.48	0.44
SWECO AB	SE	5 003	3211	5523.0	5453	1013	588.2	107.9	10.7%	589	11.39	0.58
Rejlerkoncernen AB	SE	568	521	794.5	893	890	97.2	108.8	12.2%	583	8.76	0.66
Avalon Enterprise AB	SE	65	92	214.0	224	955	1.9	8.5	0.9%	411	36.44	0.43
Eurocon Consulting AB	SE	52	38	143.2	87	1646	7.8	89.7	5.4%	437	10.70	0.27
Hifab Group AB	SE	118	95	435.6	421	1035	17.4	41.4	4.0%	226	5.33	0.22
Pöyry Group Oy	FIN	6 294	4883	8837.0	7924	1115	1101.0	149.5	12.5%	616	9.32	0.55
Etteplan OY	FIN	639	589	1454.1	2142	679	136.3	58.9	9.4%	275	6.33	0.40
WS Atkins plc 1)	UK	7 256	5947	17848.8	18017	991	1232.6	71.2	6.9%	330	7.25	0.33
Waterman Group 2)	UK	148	155	1469.0	1711	859	31.1	39.9	2.1%	90	4.98	0.11
White Young Green 2)	UK	153	310	3151.6	2768	1139	145.2	166.1	4.6%	112	0.26	0.10
WSP Group	UK	2 280	1548	9063.6	10604	855	625.3	60.1	6.9%	146	4.87	0.17
RPS Group	UK	5 413	3612	4705.8	4438	1060	657.9	150.9	14.0%	814	11.7	0.77
Mouchel Group plc 3)	UK	2 576	2145	8887.8	11121	799	-162.1	28.3	-1.8%	193		0.24
Aukett Fitzroy Robinson plc 4)	UK	87	140	271.2	228	1190	29.0	128.7	10.7%	613	4.21	0.52
Hyder Consulting plc 1)	UK	1 152	332	3828.2	4692	816	38.5	9.3	1.0%	71	22.26	0.09
Ricardo plc 2)	UK	1 693	1636	1293.2	1799	719	176.4	99.9	13.6%	909	9.02	1.26
Scott Wilson Ltd plc 5)	UK	1 130	534	4320.6	6000	720	112.9	43.7	2.6%	89		0.12
Archial Group (SMC Group) plc	UK	3 139	114	509.7	631	808	18.4	29.6	3.6%	181	14.8	0.22
Cyril Sweet Group plc 1)	UK	256	169	947.0	750	1263	26.4	35.9	2.8%	225	12.89	0.18
Arcadis	NL	9 849	6787	12396.2	13171	941	1024.2	86.2	8.3%	515	16.54	0.55
Fugro	NL	31 943	17220	23176.1	13627	1701	4099.5	324.5	17.7%	1264	10.38	0.74
Grontmij	NL	3 553	3318	9022.7	6573	1373	541.1	83.8	6.0%	505	7.38	0.37
Bertrandt AG 6)	D	1 894	1903	4232.9	5500	770	554.8	105.4	13.1%	346	8.55	0.45
Rücker AG	D	400	455	1940.5	2532	766	97.4	39.2	5.0%	180	7.87	0.23
Alten Group	FR	5 796	5142	9028.9	12470	724	914.2	81.6	10.1%	412	10.04	0.57
Altran Group	FR	5 026	4156	17657.0	18522	953	624.6	35.1	3.5%	224	34	0.24
Assystem S.A.	FR	1 902	1154	7170.6	9470	757	394.7	42.8	5.5%	122	6.45	0.16
S II A.A. 1)	FR	939	753	1869.2	2806	666	138.9	64.9	7.4%	268	10.43	0.40
Sogeclair S.A.	FR	109	122	788.3	844	934	25.8	30.9	3.3%	144	4.79	0.15
AKKA Technologies S.A.	FR	1 303	1032	4070.7	5206	782	301.7	47.2	7.4%	198	7.02	0.25
Soditech Ingénerie S.A.	FR	46	31	137.3	208	660	6.4	31.3	4.7%	147	4.87	0.22
Unweighted mean Europe						959		77.1	6.9%	358		0.37
URS Corp.	US	25 330	26575	78343.2	50000	1567	3218.5	113.1	4.1%	532	16.04	0.34
Michael Baker Corp.	US	2 462	2545	5432.4	4606	1179	391.5	88.6	7.2%	553	12.37	0.47
Tetra Tech, inc.	US	11 769	9585	10766.6	8600	1252	676.0	97.3	6.3%	1114	18.37	0.89
TRC Companies, Inc. 2)	US	491	607	2145.3	2400	894	-152.2	-312.1	-7.1%	253	1.1	0.28
Hill International, Inc	US	2 024	2120	2955.3	1937	1526	137.1	89.0	4.6%	1094	14.9	0.72
AECOM Technologies, Inc. 6)	US	22 077	26879	47531.8	32000	1485	2048.3	41.9	4.3%	840	14.79	0.57
SNC-Lavalin, Inc.	CAN	44 321	40208	47676.4	18200	2620	2704.9	150.2	5.7%	2209	23.55	0.84
Stantec, Inc.	CAN	8 014	9239	7580.6	7700	984	432.7	57.0	5.7%	1200	46.97	6.74
Unweight mean North America						1438		40.6	3.9%	974		1.36
Coffey International Ltd 2)	AU	1 596	1377	4795.3	4000	1199	171.8	39.8	3.6%	344	16.01	0.29
Cardno Group 2)	AU	2 434	1638	3058.9	3008	1017	249.6	78.5	8.2%	544	9.36	0.54

The fiscal year ends at 2008-12-31 except for

1) 2008-03-31
2) 2008-09-30
3) 2009-07-31
4) 2008-09-30
5) 2009-04-30
6) 2009-09-30

In this table result figures are not adjusted for possible differences in the account systems in the different companies. Margins, not to mention p/e-ratios, are therefore not direct comparable without closer analysis.

Source: Swedish Federation of Consulting Engineers and Architects (STD)

Denmark strengthens its position in Sweden

Ramböll continued to expand in Sweden during 2009 through several acquisitions. March saw the acquisition of EKAB Elkonsult AB in Umeå, with 17 employees and a turnover of SEK 17 million. This means the company now has a staff of 36 in Umeå, working in the areas of electricity, community development and project management.

In April, the company expanded in Örebro through the acquisition of HVAC specialists Rörplanering Stefan Uddmyr AB, with 6 employees. The company forms a new profit centre within Ramböll, with Rörplanering's Magnus Sundqvist as its Managing Director.

In August, Ramböll acquired the electrical engineering company Elkonstruktörerna i Dalarna AB, with 8 employees and a turnover of SEK 8 million. The company forms a new profit centre within Ramböll with Elkonstruktörernas' Bo Danielsson as Managing Director. With this, Ramböll's operations in Falun amount to some 50 employees within the areas of HVAC, electricity, construction and community development. This is in line with the Central Region's strategy that more offices should be multi-disciplinary.

COWI establishes itself in Sweden

On 1 January this year, Picon Teknikkonsult AB – with a little over 100 employees in five locations in Sweden – became COWI AB, when the Danish COWI AS acquired the company. This year, COWI has continued with its expansion plans by acquiring the Swedish firm Flygfältsbyrån, with a turnover of SEK 745 million in 2008 and just over 700 employees. FB will, together with the present company in Sweden, constitute the COWI Group's sixth region, COWI Sverige, with just over 800 employees. Following its merger with FB, COWI will have some 6 000 employees within the entire group, and the acquisition is a move in its ambition to be one of Northern Europe's foremost engineering consultancies with activities in selected regions all over the world. Flygfältsbyrån's subsidiary in Norway, FB Engineering AS, will be integrated with COWI AS' Norwegian company. Flygfältsbyrån's Managing Director, Anders Rydberg, will be the Managing Director of COWI Sverige and COWI AB's present Managing Director, Håkan Johansson, will be a member of the management group.

The top 300 Swedish consulting engineering and architectural groups

	08/09	07/08	Group	Services	Annual Report	Turnover MSEK	Previous year)	Average number of employees	Result after financial items MSEK	Added value/empl. kSEK	Total balance sheet MSEK	CEO/Managing directo (December 2009)
STD	1	1	SWECO AB	MD	08	5522,8	4569,5	5433	588,20	741	3012,5	Mats Wäppling
STD	2	2	ÅF-koncernen	MD	08	4569,7	3862,3	3948	460,88	778	3609,5	Jonas Wiström
STD	3	3	Semcon AB	I	08	3298,8	2497,4	3631	92,20	610	1776,2	Kjell Nilsson
STD	4	4	WSP Sverige AB	MD	08	2248,3	2036,0	2048	181,40	820	1278,2	Rikard Appelgren
STD	5	5	Rambøll AB (Swedish subsidiary)	MD	08	1311,0	1266,0	1127	122,10	775	775,8	Bent Johannesen
STD	6	7	Epsilon AB	I	08	1158,1	1043,4	1094	162,63	802	454,9	Mats Boström
	7	6	Teleca AB	I	08	1022,7	1310,8	1874	-380,70	332	1192,0	René Svendsen-Tune
	8	9	Vattenfall Power Consult AB	Enr, E,CE	08	914,1	840,8	661	64,44	923	351,2	Mikael Lundin
STD	9	8	Grontmij Sverige AB	MD	*08	890,0	889,9	780	73,01	758	387,1	Ulf Palmblad
STD	10	11	Rejlerkoncernen AB	E,I	08	797,7	651,0	893	97,19	644	408,6	Peter Rejler
STD	11	12	Tyréns AB	CE, PM	08	766,0	647,8	679	51,78	831	344,5	Ulrika Francke
STD	12	13	Flygfältsbyrån AB (COWI AB, July 2009)	MD	08	746,8	634,8	691	90,28	762	333,6	Anders Rydberg
STD	13	10	Etteplan Sverige (proforma)	I	07	671,4	671,4	876	36,41	566	238,4	Tom Andersson
STD	14	14	White arkitekter AB	A, PM, Env	08	495,8	450,1	466	41,73	762	251,4	Anders Svensson
STD	15	16	HifabGruppen AB	PM,	08	440,9	373,4	421	17,43	571	215,2	Jan Skoglund
	16	15	Xdin AB	I	08	412,5	379,3	490	58,37	637	216,5	Thomas Ängkulle
STD	17	17	Pöyry Sweden AB (Swedish subsidiary)	MD,I	08	341,9	308,2	332	25,59	747	95,5	Börje Bergström
STD	18	20	EnergoRetea AB	M,E	08	272,9	205,2	275	17,39	690	259,1	Martin Dahlgren
STD	19	18	Bengt Dahlgren AB	M, Enr,Env	08/09	257,4	225,6	259	13,30	722	116,2	Åke Rautio
STD	20	19	Structor - Gruppen	CE, PM	08	244,2	211,0	206	30,88	858	109,2	Jan Stråth, Per Fladvad,Olof Hulthén(SO)
STD	21	22	Avalon Enterprise AB	I	08	214,3	179,5	222	1,90	657	142,4	Peter Mattisson
STD	22	26	Swepro Project Management AB	PM	08	186,7	157,6	120	18,00	1083	55,2	Miguel Guirao
STD	23	21	VA-Ingenjörerna AB	Env	08	182,5	182,6	53	1,18	857	78,5	Anders Haarbo
STD	24	27	Infotiv AB	I	07/08	179,8	147,2	228	11,77	568	67,7	Alf Berndtsson
STD	25	34	Tengbom	A,IA	08	174,2	129,0	182	13,89	763	66,4	Magnus Meyer
	26	36	Forsen Projekt AB	PM	08	169,9	123,1	117	21,57	950	72,2	Jan Ahlinder
STD	27	23	Knightec AB	I	08/09	165,7	173,9	200	-3,78	587	37,8	Dimitris Gioulekas
STD	28	30	Temagruppen Sverige AB	A,PM	08	165,5	142,6	157	9,42	750	45,6	Håkan Persson
STD	29	25	Norconsult AB	CE,Env,A	08	164,1	157,0	182	4,49	607	85,6	Ljot Strömseng
STD	30	29	Bjerking AB	CE,M,A	08	163,4	143,1	157	7,85	733	65,1	Roine Gillberg

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M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

The top 300 Swedish consulting engineering and architectural groups

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STD	31	28	Consat Engineering AB	I	08	160,5	147,2	170	6,60	716	55,7	Jan-Bertil Johansson
	32	40	EBAB i Stockholm AB	PM	08	153,4	95,0	97	12,98	994	49,8	Lennart Berg
STD	33	37	Reinertsen Sverige AB (dt Reinertsen AS)	CE	08	149,3	112,9	136	6,56	780	67,0	David Hellström
STD	34	24	Golder Associates AB	CE, Env	08	148,2	170,0	123	10,64	676	84,1	Jan Hermansson
STD	35	32	Condesign AB	I,E	08	147,2	139,8	214	0,42	544	39,8	Nils-Olov Johnson
STD	36	31	ELU Konsult AB	CE	08/09	147,1	140,3	113	17,76	899	60,1	Sten-Åke Torefeldt
STD	37	54	Eurocon Consulting AB	I	08	143,2	70,9	87	7,80	712	78,6	Peter Johansson
STD	38	39	Wingårdh-koncernen	A	08	139,2	103,4	116	28,89	924	83,5	Gert Wingårdh
STD	39	50	FOJAB Arkitekter AB (Group)	A	08/09	139,1	163,9	79	6,61	864	85,5	Björn Wigelius
STD	40	63	Projektengagemang group	MD	08	136,7	59,7	114	15,26	782	23,1	Per-Arne Gustavsson
STD	41	33	TP Gruppen AB (NIRAS Group A/S 2008)	PM	08	129,5	129,5	105	9,44	742	48,7	Jan Leife
STD	42	38	Atkins Sverige AB	CE	08/09	127,3	112,6	135	-9,02	535	53,9	Johannes Erlandsson
STD	43	35	Centaur Segula Tech AB (Groupe Segula Techn. SA)	I	08	107,9	125,3	144	0,83	576	42,9	Mats Lian
STD	44	41	Midroc Engineering AB	CE,I	08	107,8	93,3	85	8,51	947	35,2	Stefan Kronman
STD	45	49	NYRÉNS Arkitektkontor AB	A	08	104,1	78,1	91	11,47	839	47,9	Mats Norrbom
	46	44	FVB Sverige AB	Enr	08	102,0	87,6	100	10,15	765	44,7	Leif Breitholtz
STD	47	53	Elator AB	I	08	100,2	72,6	62	5,76	690	45,6	Ulf Mill
STD	48	51	Rücker Nord AB	I	08	93,8	76,9	99	10,73	730	43,1	Wolfgang Rücker
	49	57	PRC Engineering AB	I (S)	08	86,6	65,5	56	7,18	794	30,3	Per Leftinger
STD	50	72	Riba koncernen AB	M,Enr	08/09	85,7	64,8	59	6,44	625	32,1	Björn Thelning
STD	51	45	Fasitet PDE AB (holländska PDE Automotive BV)	I	08	85,1	84,8	64	1,84	578	53,9	Mats Bjurefalk
STD	52	52	Nitro Consult AB (dt Orica Norway)	CE	07/08	81,1	72,8	62	13,08	919	83,6	Donald Jonson
	53	43	Projektbyrån Stockholm AB	PM	08/09	80,8	89,3	44	12,18	1051	26,8	Jonas Hellström
STD	54	48	Råbe Industrikonsult AB	I	07/08	79,6	79,6	71	10,77	654	40,5	Sture Leandersson
STD	55	46	IKG – Group	I	08/09	78,0	84,0	90	11,08	682	37,7	Mathias Ohlson
STD	56	*97	Arkitekterna Krook & Tjäder AB	A	08	76,5	73,5	85	3,93	622	26,4	Mats Bergstrand
STD	57	55	INCOORD AB	M	08	76,3	66,3	57	13,38	966	25,5	Olle Edberg
STD	58	67	SweRoad AB	CE	08	76,2	53,6	53	1,75	966	57,9	Per-Erik Winberg
STD	59	47	Geosigma AB	CE,Env	08	72,1	81,3	71	0,26	679	23,6	Bo Eliasson
STD	60	56	Brunnberg & Forshed Arkitektkontor AB	A	08	71,6	67,3	59	11,08	926	6,7	Bengt Hellström
STD	61	42	Creator Teknisk Utveckling AB	I	May-Dec 08	68,8	93,4	86	19,10	892	88,4	Allan Salåker
STD	62	96	Automations Partner AB	I	08	67,5	40,4	28	3,54	846	12,4	Magnus Lindvall
STD	63	60	Liljewall Arkitekter AB	A	08	66,9	57,3	60	6,20	711	23,4	Leif Blomkvist
STD	64	77	AROSgruppen Arkitekter AB	A	07/08	66,4	66,4	63	6,90	758	26,2	Jan-Ove Fogelberg
STD	65	59	Kadesjös Ingenjörsbyrå AB	CE,M	08/09	65,7	59,7	51	6,17	744	26,6	Håkan Kadesjö
STD	66	74	AIX Arkitekter AB	A	08/09	65,6	56,2	62	7,34	723	25,0	Erik Källström
STD	67	62	Bygganalys AB	PM	08	64,2	55,8	52	6,07	830	27,1	Anders Kivijärvi
STD	68	84	BERGAB Berggeologiska Undersökningar AB	CE	08	61,2	43,4	44	7,00	772	23,5	Örjan Wolff
STD	69	87	TM-Konsult AB	CE, I	08/09	60,6	51,3	76	6,90	574	34,5	Kennet Holmbom
STD	70	65	ÅWL Arkitekter AB	A	08/09	60,2	53,8	47	5,60	751	23,9	Jacob Haas
STD	71	114	BSK Arkitekter AB	A	08	59,0	33,9	41	6,05	775	29,3	Ulf Mangefors
STD	72	70	Bergsäker AB	CE	08	58,8	52,3	48	4,19	681	27,8	Göran Karlsson
	73	73	PQR Consult gruppen (from Wikmar & Sone Konsult AB)	M,E	08/09	56,7	56,8	58	5,80	714	17,7	Mikael Bisther
	74	66	Strategisk Arkitektur Fries & Ekeroth AB	A	08	55,8	53,7	50	6,06	741	19,2	Göran Ekeroth
STD	75	64	VBK Konsult	CE	08/09	54,6	53,9	55	2,94	748	26,4	Ulf Kjellberg
STD	76		ISS Fastighetsutveckling	MD	08	54,2	57,4	44		210		Janne Svensson
	77	80	Ergonomidesign AB	I	07/08	52,4	46,2	51	6,56	714	29,2	Krister Torsell
	78	78	AB Teknoplan	E	08/09	51,6	47,2	42	10,78	955	23,3	Bengt-Erik Brorsson
	79	100	Solvina AB	I	07/08	51,4	38,6	32	8,91	926	43,9	Mikael Nyström
STD	80	105	Integra Engineering AB	PM,CE	08	49,0	36,1	52	4,86	802	21,5	Anders Skoglund
	81	81	HRM/Ritline AB	I	07/08	48,7	44,9	67	3,85	617	25,9	Jan Ulriksson (SO)
	82	85	BrandInvest (former Brandskyddslaget AB)	M	08	47,7	43,3	30	7,91	1081	23,5	Bo Wahlström (slutar)
STD	83	122	HJR Projekt-el AB	E	08	47,3	31,1	38	1,35	734	19,9	Lennart Harging
STD	84	95	Equator Stockholm AB	A	08	47,1	40,7	40	5,52	739	18,4	Annica Karlsson
	85		AcobiaFlux AB	I	08	47,0	37,9	35	6,41	885	25,9	Mikael Nilsson

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STD	86	92	LEB Consult AB (Group)	M	08/09	46,9	41,5	41	5,92	757	20,1	Lars Mohlin
STD	87	69	Goodtech Solutions Karlstad (fd Wermtec)	I	08	45,1	53,5	43	2,09	639	25,2	Anders Larsson
STD	88	113	Reflex Arkitekter AB	A	07/08	44,9	34,0	47	6,58	712	27,8	Johan Linnros
STD	89		Vega-Energi AB	Enr,Env,I	08/09	44,9	43,86	40	2,20	665	12,5	Max Jansson
	90	94	Wester+Elsner Arkitekter AB	A	08/09	44,6	45,6	37	5,12	870	11,7	Lars Wester
STD	91	93	Projektgaranti AB (Sjöland& Thyseliusgruppen, dec 2008)	PM	08/09	44,3	41,6	40	1,90	811	11,3	Michael Walmerud
STD	92	89	FLK Sverige AB (Group)	M	08	44,1	42,2	59	3,97	549	24,8	Nils Zinn
STD	93	79	KNSS Gruppen AB	CE,E,M	08/09	42,6	42,4	38	3,07	680	23,5	Denny Sandberg
STD	94	101	TQI koncernen	M	08/09	42,6	36,5	38	6,13	614	19,2	Jan Nöid
STD	95	82	InstallationVision AB (f d VVS-Vision AB)	M	08/09	42,4	44,2	37	7,81	832	13,1	Olle Källman
STD	96	86	Ingenjörsbyrån Andersson & Hultmark AB	M	08	41,6	43,0	42	5,84	721	20,1	Håkan Elfström
STD	97	58	COWI AB (fd PICON Teknikkonsult, 2008)	MD	May-Dec 08	41,0	59,8	81	1,94	528	20,8	Håkan Johansson
STD	98	75	Scheiwiller Svensson Arkitektkontor AB	A	08/09	41,0	48,9	37	0,09	612	14,4	Inger Lindberg Bruce
	99	104	Brandkonsulten Kjell Fallqvist AB	M	08	40,7	36,1	24	7,77	1405	23,9	Kjell Fallqvist
STD	100	178	Anders Bergkrantz Arkitekter AB	A	08	40,6	20,2	18	0,80	646	8,9	Anders Bergkrantz
	101	71	HOAB-gruppen AB	PM	*08	39,9	52,0	38	4,00	721	33,7	Per Olsson, Th. Liljenberg, L.Turesson, R.Nordin m fl
STD	102	130	Semrén & Månsson Arkitektkontor AB	A	07/08	39,7	29,9	39	7,85	732	25,4	Magnus Månsson
STD	103	61	Arkitekthuset Monarken AB	A	08/09	39,6	56,1	42	4,77	549	23,7	Gunnar Grönlund
STD	104	103	Koteko AB	I	08	38,4	36,1	27	5,48	893	19,6	Lars Nyström
STD	105	102	Cross Design i Göteborg AB	I	08	37,9	36,4	42	2,83	606	16,8	Tommy Bergh
	106	115	FS Dynamics AB	I	08/09	37,7	33,5	43	1,44	577	4,7	Ulf Mårtensson
STD	107	108	BAU Arkitekter AB	A	08	37,6	35,4	42	7,41	677	19,0	Per-Eric Sundby
	108	107	IP Industri & Projektconsult AB (purchased by E.On August 2009)	I	07/08	37,0	35,9	38	1,98	647	6,5	Michael Augustsson
STD	109	106	Alfakonsult AB	PM, MA	08	36,1	36,0	25	1,02	925	10,6	Kristian Hamberger
	110	124	Konkret Rådgivande Ingenjörer AB	CE	08	36,0	30,7	29	7,87	930	15,3	Olle Norrman
STD	111	110	Mondo Arkitekter AB (fusion with FRS Architechts, March 2009)	A	08	35,9	35,1	42	-1,67	557	12,0	Kurt Axelsson
STD	112		BK Beräkningskonsulter AB	CE,I	08/09	35,7	35,2	30	5,02	736	15,5	Bengt Tomas Carlsäng
STD	113	109	Centerlöf & Holmberg AB	CE	*07	35,3	35,3	31	8,28	829	36,1	Bengt Andersson
STD	114	159	Berg Arkitektkontor AB	A	08	34,7	23,3	23	0,40	618	9,5	Svante Berg
STD	115	120	AQ Arkitekter i Eskilstuna AB	A	08/09	34,2	31,3	27	6,54	792	14,6	Lars Almstedt
STD	116	99	Helenius Ingenjörsbyrå AB	M	08	34,1	38,7	24	4,73	816	14,7	Arne Wallström
STD	117	137	CA consult gruppen	PM	08	33,6	28,0	27	3,47	701	20,5	Lennart Olsson
STD	118	125	Järnvågen AB (Bergström, BEKAB, Indautomat m fl)	I	08/09	33,3	39,2	40	2,96	663	22,0	Tord Hägglund (SO)
STD	119	128	TEAM TSP Konsult AB	E	08	33,3	29,9	25	5,89	662	22,4	Göran Berg
STD	120	98	Wikström VVS-Kontroll AB	M	08/09	33,2	33,4	34	2,82	658	14,0	Stefan Pettersson
STD	121	116	VAP VA-Projekt AB (VAP Invest II AB)	Env	08/09	33,0	33,1	28	4,88	754	33,8	Mikael Melin
STD	122	129	AG Arkitekter AB	A	08	32,6	29,9	32	4,93	788	12,8	Anders Gunnedal
STD	123	112	SYD ARK Konstruera AB	A,CE	08/09	32,3	34,3	34	2,15	548	19,7	Ulf Larsson
STD	124	90	Arkitektbyrån AB i Göteborg	A	08	32,0	42,1	37	-0,93	538	11,3	Jan Åkerblad
STD	125	131	Prows AB, Industriell Process & VVS	I,M	07/08	31,6	29,3	35	1,94	650	15,1	Kjell S. Andersson
STD	126	141	P O Andersson Konstruktionsbyrå AB	M	08	31,0	26,7	18	7,54	658	25,2	Arne Berggren
STD	127	138	Creacon Halmstads Konsult AB	CE	08	31,0	27,4	36	-1,22	550	13,0	Göran Feldt
STD	128	152	Pidab Instrumentdesign AB	I	07/08	30,6	25,4	29	2,07	766	12,7	Jan Dahlén
	129	163	URS Nordic AB	Env	07	30,6	23,0	29	2,07	766	12,7	Jesper Kildsgaard
STD	130	133	Archus Arosia Arkitekter AB	A	08	30,3	29,3	30	4,57	767	18,4	Johnnie Pettersson
STD	131	136	Projektledarhuset i Stockholm AB	PM	08/09	30,0	28,2	18	2,76	975	14,6	Örjan Källström
STD	132	127	MAF Arkitektkontor AB	A	07/08	29,9	29,9	25	2,28	793	16,4	Mats Jakobsson
STD	133	142	Thomas Eriksson Arkitektkontor AB	A	08/09	29,9	33,7	31	-0,57	593	10,4	Thomas Eriksson
	134	111	Hedström & Taube Projektledning AB	PM	08	29,8	34,4	12	3,50	1304	9,1	Erik Taube
STD	135		Link Arkitektur AB	A	juli-dec 08	29,7	66,4	66	-2,38		16,5	Linda Marend
	136	139	Per Schönbeck Elprojekt AB – Group	E	08	29,7	27,3	41	0,34	589	19,0	Roger Johansson

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STD	137	121	Sören Lundgren Byggkonsult AB	CE, PM	08/09	29,6	31,2	21	3,85	868	12,6	Anders Harlin
STD	138	148	Projektbyggaren i Blekinge AB (projekteringsbolagen)	PM,A	08	29,1	26,0	22	3,42	849	11,6	Christer Lennartsson, Mats Persson (SO)
	139	155	PB-Teknik AB	M	07/08	29,0	23,9	25	2,66	621	10,7	Patrik Bergström
STD	140	143	Projektteamet Västsvenska AB	CE	08	28,9	26,6	26	2,39	858	10,9	Lars Howander (SO)
STD	141	145	Mats Strömberg Ingenjörsbyrå AB	E	08	28,8	26,3	19	2,28	958	9,6	Mats Strömberg
STD	142	156	Studio 1.11 Arkitekter AB	A	08	28,6	23,7	21	2,51	794	12,1	Anders Lindh
STD	143	144	Fagerström Industrikonsult AB	I	08/09	28,5	26,4	21	3,59	718	11,2	Per Fagerström
STD	144	117	Danatec AB (Rejlerkoncernen aug 2008)	I	08	28,2	32,9	42	1,06	515	8,8	Lennart Sjölund
STD	145	197	AxRo Consult AB	M	07/08	28,0	26,7	41	0,98	537	6,4	Anders Walter
	146	135	Ågrenkonsult Sverige AB	PM	08/09	28,0	27,0	18	4,66	1008	10,5	Anders Röstlund
STD	147	149	GMKI Elkonsult AB	E, Enr	08	27,7	26,0	35	0,64	582	13,9	Magnus Andersson
STD	148	134	Lund & Valentin Arkitekter AB	A	08/09	27,5	29,1	34	0,74	562	8,7	Bo Karlberg
STD	149	164	SAMARK Arkitektur & Design AB	A	08	27,5	22,9	24	4,78	791	9,8	Stefan Bergkvist
STD	150	147	Mecad AB	M,CE	07/08	27,4	26,0	31	3,11	662	11,4	Sören Grönlund
	151	150	Camatec Industriteknik AB	I	08/09	27,2	25,6	32	1,43	605	6,1	Peter Mikael Wigarthsson
STD	152	123	Landskapsgruppen Göteborg AB	A	07/08	27,0	30,9	28	2,12	663	13,4	Tomas Hagström
STD	153	161	Bertrandt Sweden AB	I	07/08	26,9	23,1	24	4,21	723	16,4	Volker Schier, Ulrich Subklew (SO)
STD	154	173	Rockstore Engineering AB	CE	08/09	26,5	25,7	24	3,34	777	11,1	Johnny Samuelsson
	155	282	Ferax Projektledning AB	PM	08	26,4	23,1	19	6,79	1074	12,7	Stefan Svensson
STD	156	165	Creacon AB	A,PM,Env	08	26,2	22,7	28	3,12	774	11,9	Lennart Hillerström
	157	126	HillStatik AB	S,CE	08	25,9	23,6	18	4,39	999	41,9	Owe Svensson
STD	158		Knut Jönsson Byggadministration-group	CE,PM	08/09	25,9	20,2	16	5,11	911	8,3	Kent Sterby
STD	159	151	ACNL Elteknik AB	E	08	25,8	25,5	26	0,08	527	11,4	Kenneth Eriksson
STD	160	146	Electro Engineering Group AB	E	08/09	25,6	26,0	21	2,68	935	13,9	Bo Andersson
STD	161	175	Deva Mecaneyes AB	I	08	25,5	20,8	28	2,62	686	11,1	Magnus Welén
STD	162	179	Erséus Arkitekter AB	A	08	25,1	20,0	23	2,01	772	8,5	Peter Erséus
	163	176	TKG Teknikkonsultgruppen AB	I, E	08	24,9	20,3	18	4,60	832	11,1	Robert Johansson
	164	169	Berg Bygg Konsult AB (ÅF July 2008)	CE	07/08 16 mån	24,9	30,5	15	2,43	609	4,4	Kennerth Röshoff
STD	165	170	BSV Arkitekter & Ingenjörer AB	A, CE	08	24,7	24,7	30	0,24	528	8,7	Johnny Grauengaard
	166	157	KFS Anläggningskonstruktörer AB	CE,PM	07/08	24,7	23,5	22	3,36	769	15,5	Hans Klingenberg
STD	167	119	A5 Arkitekter & Ingenjörer AB (Tengbom Dec 2008)	A	May-Dec 08	24,5	34,7	41	1,08	646	12,6	Johan Vestlund
STD	168	158	Mekaniska Prövningsanstalten MPA AB	M	08	24,5	23,4	15	3,17	1148	10,0	Torbjörn Ohlsson
	169	168	Creanova AB	M, Enr	08/09	24,1	28,89	18	3,70	797	12,2	Göran Olsson
STD	170	248	EVU Energi & VVS Utveckling AB	Enr, M	08	23,8	12,1	27	-1,80	580	10,4	Per-Otto Bengtsson
STD	171		Konsultgruppen i Bergslagen AB	I	08/09	23,6	22,1	15	2,61	926	8,5	Ove Larsson
STD	172	185	Alteco AB	E	08	23,6	19,2	19	2,07	745	12,2	Andreas Lundström
	173	153	ABAKO Arkitektkontor AB	A	08	23,5	24,3	29	0,46	601	10,3	ingen vd
STD	174	183	Arkitektgruppen G.K.A.K AB	A	08	23,0	19,6	21	2,16	695	8,8	Bo Johansson
STD	175	192	BBH Arkitekter & Ingenjörer AB	A,CE	08	22,7	18,1	15	1,02	760	6,3	Rolf Nilsson
STD	176	194	Rosenbergs Arkitekter AB	A	08	22,5	17,9	23	3,77	771	12,7	Inga Varg
STD	177	214	Devellum Design & Development AB	I	08	22,4	15,5	18	1,02	680	5,7	Peter Wallin
STD	178	166	STIBA AB	CE	08	22,4	22,5	20	6,22	953	15,1	Rune Dalmyr
STD	179	191	Carlstedt Arkitekter AB	A	08	22,3	18,4	22	1,73	631	11,7	Kerstin Eken
	180	189	ARIA Consulting AB	MD	08	22,2	18,6	26	0,82	514	6,1	Alf Fredell
STD	181	174	Consultec Arkitekter & Konstruktörer AB	A,CE	07/08	21,9	21,9	20	3,50	747	12,1	Allan Forslund
	182	204	Fire Safety Design AB	M	08	21,8	16,6	23	0,96	707	7,2	Richard Nilsson
STD	183	162	Murman Arkitekter AB	A	08	21,8	23,0	26	0,63	588	8,2	Hans Murman
	184	118	A&P Arkitekter AB (Ahrbom & Partner)	A	08	21,6	32,3	20	1,63	693	13,0	Per Ahrbom (SO)
STD	185	171	Knut Jönson Ingenjörsbyrå AB	CE	07/08	21,4	21,4	20				Per Arne Näsström
STD	186	182	Rördesign i Göteborg AB	I,M	08/09	21,3	19,6	25	0,81	698	12,8	Jan Karlsson
STD	187	76	KPA Engineering AB	I	jul-dec 08	21,2	48,0	62	0,98	555	28,1	Hans Paulsson
STD	188	206	Contekton Arkitekter Fyrstad AB	A	07/08	20,8	16,3	20	6,76	938	16,1	ingen vd
	189	154	Kemakta Konsult AB	Env	08	20,8	23,9	20	0,21	817	7,7	Bertil Grundfelt
STD	190	207	Umeå Industri & Kraft Konsult AB	I,E	08	20,6	16,0	15	2,10	957	10,6	Bertil Rönnlund
STD	191	181	PIAB PI i Göteborg AB	CE	08	20,5	19,8	26	0,37	437	7,9	Stefan Bengtsson
	192	172	Clinton Mätkonsult AB	CE	07/08	20,4	21,3	22	0,41	565	7,1	Johan Nyström

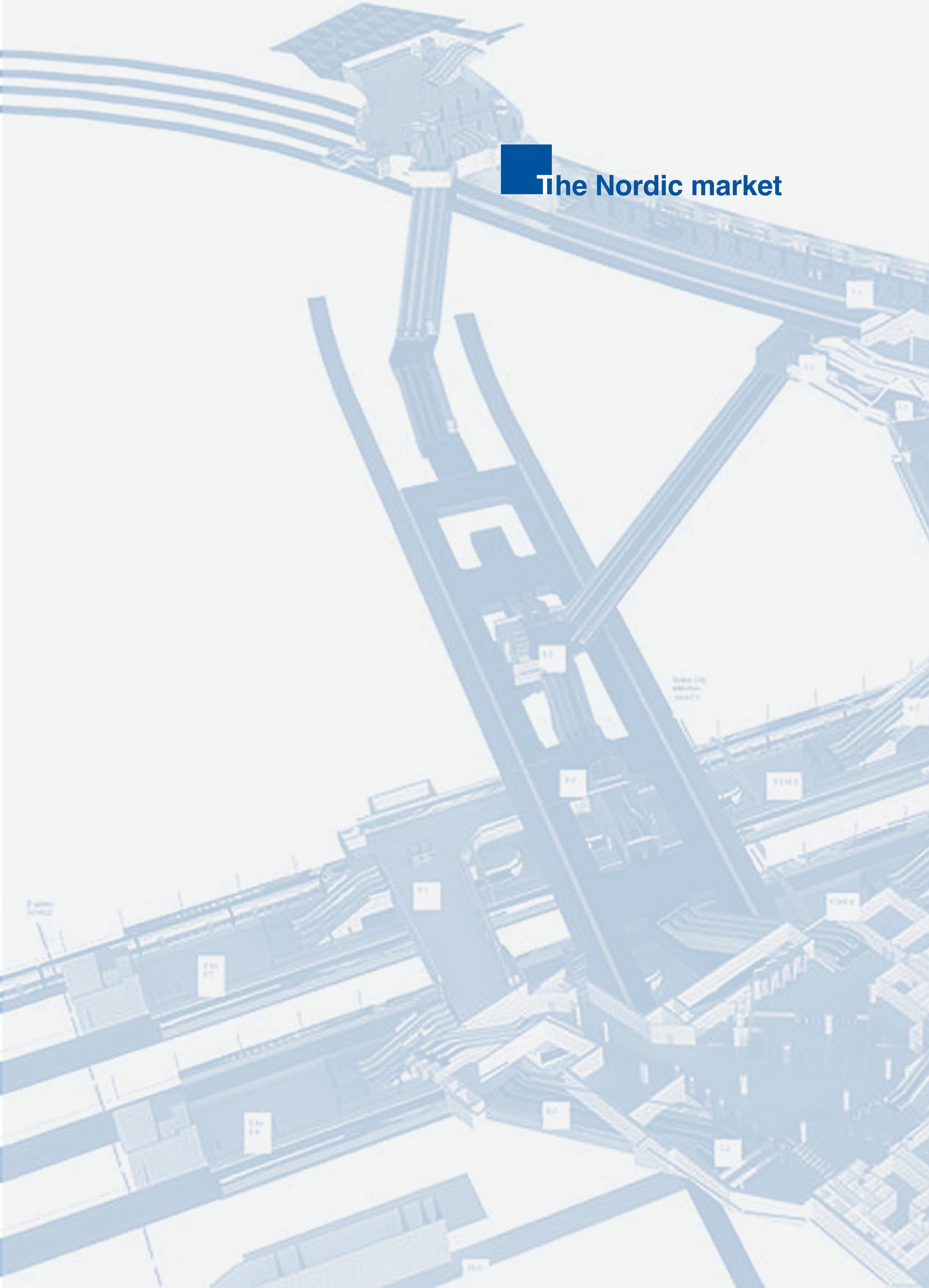
	08/09	07/08	Group	Services	Annual Report	Turnover MSEK	Previous year)	Average number of employees	Result after financial items MSEK	Added value/empl. kSEK	Total balance sheet MSEK	CEO/Managing director (December 2009)
STD	193	188	METRO Arkitekter AB	A	08/09	20,2	18,8	21	2,61	640	7,9	Claes R. Jansson
STD	194	187	Ahlqvist & Almqvist Arkitekter AB	A	07/08	20,1	19,0	18	3,04	738	4,8	Bengt Ahlqvist
	195	205	Visby Arkitektgrupp AB	A,CE	08	19,6	16,4	18	1,33	789	6,6	Annalena Mosséen (SO)
STD	196	132	Pyramiden Arkitekter i Göteborg AB	A	08	19,3	29,3	29	0,95	638	9,5	Dan Nyström
STD	197	140	Relitor AB (f d Luleå Industriteknik AB)	I	08	19,3	27,2	17	0,71	621	5,5	Mikael Nilsson
STD	198	201	Wickenberg Bygganalys AB	PM	08	19,2	17,2	11	2,72	968	9,5	Peter Widding
STD	199	218	Rintekno AB (owned by Rintekno Oy)	I	08	18,2	15,2	19	1,38	722	14,7	Lars Lindberg
STD	200	223	Lomar Arkitekter AB	A	08	18,2	14,4	16	2,15	677	4,8	Pontus Lomar
STD	201	202	K-Konsult Elmiljö AB	E	08	17,5	17,1	22	2,02	599	10,0	Leif Ulmgren
STD	202	160	FL Arkitektgrupp i Borås AB	A	08	17,5	23,2	19	1,78	679	9,4	Karl Blomberg
STD	203	195	Vatten och Samhällsteknik AB	Env	08/09	17,4	17,8	19	1,41	965	7,6	Stefan Ljung
STD	204		Exacon-group	CE, PM	08	17,4	11,8	13	4,34	944	11,0	Anders Sundberg
STD	205	190	Rolf Tellstedt i Göteborg AB	CE	08	17,3	18,5	23	0,85	529	22,8	Björn Tellstedt, Thomas Östergren
STD	206	208	Pantektor AB / SKAPI Projektutveckling AB	A,CE,PM	08	17,3	16,0	15	0,97	751	8,9	Bertil Hägg
STD	207	209	Arkitekterna Engstrand och Speek AB	A	07/08	17,2	15,8	16	1,65	661	9,1	ingen vd
STD	208	196	Elektrotekniska Byrån i Karlstad AB	E,I	08/09	17,1	17,6	18	1,95	749	8,0	Jonas Bjuresäter
STD	209	213	BJ-Konsult i Visby AB	CE,A,PM	08	17,0	15,5	17	3,54	623	20,8	Birger Jörnhammar
STD	210	180	Marktema AB	CE	07/08	17,0	19,8	15	0,86	699	8,2	Johan Gréen
	211	184	Uulas Arkitektkontor AB	A	08	17,0	19,5	14	4,02	836	9,1	Jerker Edfast
STD	212	225	Fredblad Arkitekter AB	A	08/09	16,9	14,1	18	4,79	732	8,6	Leif Jönsson
STD	213	203	EKAB Elkonsult KB (Ramböll April 2009)	E	07/08	16,8	16,8	19		614	12,1	Åke Gradin
STD	214	217	HMXW Arkitekter AB	A	08	16,6	15,2	16	1,28	677	4,9	Ulf Widegren
STD	215	177	Södergruppen Arkitekter AB	A	08	16,5	20,2	15	-0,05	396	7,0	Jens Deurell
	216	230	Svea Teknik AB	I	08	16,3	13,8	17	3,50	857	9,4	Rune Lindberg
	217	245	Seveko VVS Konsult AB	M	08	16,3	12,2	14	1,59	770	6,0	Henrik Sandén
	218	240	Brandgruppen i Sverige AB	M	08/09	16,3	12,7	13	0,76	866	6,3	Johan Renvall
	219	198	Cross Technology Solutions AB	I	08	16,0	17,4	17	2,03	737	7,1	George Sioustis
STD	220		Frenning & Sjögren Arkitekter AB	A	08/09	15,8	11,4	14	3,13	755	6,6	Sven Magnus Sjögren
STD	221	211	Vinga Elprojektering AB	E	07/08	15,7	15,6	21	-0,01	583	5,4	Mats Svengård
	222	212	MRM Konsult AB	CE,Env	07/08	15,7	15,6	19	1,00	561	7,9	Mikael Nilsson
STD	223	239	Atrio Arkitekter i Kalmar AB	A	08	15,7	12,8	18	1,33	629	10,2	Olof Utterback
STD	224	229	Ingenjörsgruppen Ståhlkloo AB	M	09	15,6	13,9	22	0,24	572	4,3	Torbjörn Pettersson
STD	225	224	IMEK VVS Rådgivande Ingenjörer AB	M	08	15,6	14,2	11	0,34	673	5,1	Ray Symes
STD	226	221	LPS Konstruktörer AB	CE	08	15,4	14,8	12	3,21	886	8,3	Gösta Holgersson
STD	227	261	KUB Arkitekter AB	A	08/09	15,3	12,5	14	2,43	744	6,3	ingen vd
	228	226	Projektidé i Uppsala AB	PM	07/08	15,2	14,1	10	3,06	1010	7,3	Henrik Billing (SO)
	229	243	Thorbjörnsson+Edgren Arkitektkontor AB	A	08	15,0	12,6	17	3,22	692	8,1	Ulf Thorbjörnsson
STD	230	228	Henrik Jais-Nielsen & Mats White Arkitekter AB	A	08/09	14,7	14,1	13	1,75	879	8,4	Nils-Erik Landén
STD	231	227	Ahlsénarkitekterna AB	A	08	14,6	14,1	8	1,22	932	5,0	Mats Hallén
STD	232	215	TIBI Stockholm AB	PM	07/08	14,5	15,4	9	2,86	923	6,6	Per Eriksson
STD	233		Prodelox AB	I	08/09	14,2	9,6	14	0,52	657	4,1	Johannes Walfridsson
STD	234	252	Storköksbyrån i Stockholm AB	S	08/09	14,0	12,1	1	4,40	4696	18,6	Peggie Ulle
STD	235	254	Projectpartner AB	PM	08	13,8	11,4	9	2,64	1117	7,9	Joachim Öhman
STD	236	242	Sundell Arkitekter AB	A	08	13,7	12,7	13	1,22	706	5,7	Mats Lennfalk
STD	237	199	Nordstrand Friesenstam Rung Arkitektkontor AB	A	08/09	13,6	17,2	17	0,16	495	3,3	Peter Rung Wallenstein
	238	219	Megaron Arkitekter AB	A	08	13,6	14,9	10	1,74	804	5,6	Anders Högberg
STD	239	294	MIAB Mikaelsson Ingenjörsbyrå AB	E	08/09	13,5	12,6	10	3,74	1027	6,3	Åke Larsson
STD	240	246	Lindberg Stenberg Arkitekter AB	A	08	13,1	12,2	11	1,29	817	6,5	Dag Lindberg
	241	234	Vcon VVS-Konsult AB	M	08/09	12,8	13,0	13	3,59	754	13,7	Nicklas Andersson
STD	242	255	Arkitekthuset Jönköping AB	A	08/09	12,4	11,2	13	1,76	717	5,2	Bert Noorlander
STD	243	233	AGERA VVS-Design AB	M	08	12,4	13,3	12	0,07	762	4,5	Matthias Larsson
	244	258	Sprängkonsult i Göteborg AB	CE	08	12,4	10,8	9	2,31	892	4,8	Kurt Östlund (SO)
STD	245	244	CH Arkitekter AB	A	08	12,3	12,4	13	1,48	751	6,5	Per Seiving
	246	270	Arkitektgruppen i Gävle AB	A	08	12,3	10,1	10	1,01	788	4,2	Christina Lundberg (SO)

STD = Member of the Swedish Federation of Consulting Engineers and Architects. (*) = lack of conforming figure/proforma/assumed – = missing figure
PM = Project Management, A = Architecture, CE = Civil/Structural Engineering, Env = Environment, Enr = Energy, E = Electrical,
M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

The top 300 Swedish consulting engineering and architectural groups

	08/09	07/08	Group	Services	Annual Report	Turnover MSEK	Previous year)	Average number of employees	Result after financial items MSEK	Added value/empl. kSEK	Total balance sheet MSEK	CEO/Managing director (December 2009)
STD	247		Byggkonstruktörerna Bäckström & Co AB	CE	08	12,2	8,6	13	3,55	770	3,9	Per Bäckström
STD	248	267	TH-Konsult AB	M	07/08	12,1	10,2	11	0,36	627	3,8	Bo Lindberg
STD	249	222	FRS Arkitekter AB (fusion with MONDO Arkitekter March 2009)	A	07/08	12,0	14,6	14	3,45	996	6,1	Bo Svensson
STD	250	257	Lindstam Broman Elgström arkitekt AB	A	08	11,9	11,0	13	2,46	749	9,5	Mats Elgström
STD	251	266	A-Gruppen Flensborns Arkitektkontor AB	A	08	11,7	10,2	14	1,10	676	4,3	Per Bäckström
STD	252	237	Johan Celsing Arkitektkontor AB	A	08	11,7	12,9	12	0,47	727	3,7	Johan Celsing
STD	253		Tikab Strukturmekanik AB	CE	08	11,7	8,5	11	1,37	767	7,1	Per Stribeck
STD	254	249	Geosystem i Sundsvall AB	CE	08/09	11,5	12,0	12	0,49	510	4,0	Mats Olsson
	255	250	Fe Arkitekter AB	A	07/08	11,5	11,7	10	1,02	636	4,1	Ove Bergström
	256	241	Industrikonsult Palmgren & Partner AB	I, PM	08	11,4	12,7	10	0,06	474	3,5	Thomas Palmgren
	257	251	Epsilon Byggkonsult AB	CE	07/08	11,3	11,6	13	1,02	659	4,4	Jimmy Bredstenslien
STD	258		Kåver & Mellin AB	CE	08	11,3	8,5	10	2,30	768	6,1	Anders Hedberg
STD	259	265	Malmström & Edström Arkitektkontor AB	A	08/09	11,2	10,2	13	1,33	629	5,0	Christer Malmström
	260	271	Uppsala Elkonsult AB	E	08	11,2	10,1	10	0,06	572	3,4	Jan-Olof Darberg
	261	231	Contekton Architects and Planners AB	A	08	11,2	13,7	6	1,23	662	8,8	Sten Jonson
STD	262	216	Tekmat AB	I	08	11,1	15,4	15	-0,31	436	3,6	Thomas Quist
	263	235	ENT Energiteknik AB	E	08	11,1	13,0	12	1,23	749	5,8	Elmer Wiklund (SO)
	264		Procema Energi & Miljöteknik	I	08	11,1	7,9	10	1,87	803	4,0	Lars ingavr Olsson
	265	272	Teknikfunktion G Clemensson AB	CE	08/09	11,1	10,1	8	1,69	881	4,2	Gösta Clemensson
	266	263	Comarc Projektering AB	CE,A	07/08	10,9	10,4	10	1,88	813	4,5	Peter Nygren
STD	267		TRANARK AB	A	08	10,9	6,4	10	0,73	509	3,3	Lennart Göransson
	268	232	SamCon AB	CE,PM	08/09	10,7	13,5	12	1,03	636	8,1	Stefan Ramström
	269	253	VVS och Energi i Borås AB	M	08/09	10,7	11,4	11	2,98	735	6,0	Gerhard Englund
	270		Kjellander & Sjöberg AB	A	07/08	10,6	9,33	13	-0,13	529	3,0	Bengt Sjöberg (SO)
STD	271	259	Arkitektgruppen i Malmö AB	A	08	10,6	10,7	11	3,30	778	10,8	Lars Karud
	272		Rundquist Arkitekter AB	A	08	10,6	8,8	10	1,16	710	4,1	Henrik Rundquist
STD	273	276	Gajd Arkitekter AB	A	08/09	10,3	12,3	12	0,64	594	4,9	Mikael Nädele
	274	284	Ekg Elkonsultgruppen i Karlstad AB	E,I	07/08	10,3	9,4	11	1,09	656	4,5	Per-Ola Eriksson (SO)
STD	275		ELE Engineering AB (f d Elkonsult Lennart Eriksson)	E	07	10,2	11,9	13	0,78	644	3,1	Henrik Eriksson
STD	276	278	Larsson Arkitekter i Stockholm AB	A	08/09	10,2	9,6	12	-0,25	606	7,5	Jerker Larsson
	277	210	Bjurström & Brodin Arkitekter AB	A	07/08	10,2	15,8	12	-0,25	536	3,7	ingen vd
	278		Bergfjord & Ivarsson Arkitekter AB	A	08/09	10,2	9,8	9	2,53	870	8,1	ingen vd
STD	279	289	Metator VVS-Konsult AB	M	08/09	9,9	9,0	10	1,07	703	3,8	Lars Olof Olsson (SO)
STD	280	292	Danewids Ingenjörsbyrå AB	CE	08/09	9,8	8,9	9	1,65	806	5,5	Göran Bäckström
STD	281		CGC Arkitektkontor AB	A	07/08	9,8	7,0	9	2,00	861	7,0	Magnus Månsson
	282		Allmänna VVS-Byrån AB	M	08/09	9,8	8,4	5	1,63	1055	5,1	ingen vd
STD	283		JOLIARK AB (Johanson Linnman Arkitekter)	A	07/08	9,6	10,3	12	0,93	601	5,0	Hans Linnman
STD	284	281	Jan Lundqvist Arkitekter AB	A	08	9,6	9,5	12	0,72	572	4,1	Jan Lundqvist
STD	285	299	Johnels och Moberg Arkitekter AB	A	07/08	9,6	8,5	10	0,75	651	5,9	ingen vd
STD	286	279	Zuez Arkitekter AB	A	07/08	9,6	9,6	8	0,35	653	3,2	Maria Grunditz
	287		Zenit Arkitekter AB	A	07/08	9,6	9,0	6	0,11	629	1,5	Janis Zalamans
	288		Bloms Ingenjörsbyrå i Borlänge AB	CE	07/08	9,5	8,0	10	0,29	720	4,8	Hans Janing
	289	268	A-Konsult Arkitekter och Ingenjörer i Helsingborg	A,CE	08	9,5	10,2	10	1,01	738	2,9	Matts Johansson
STD	290		ATM Engineering AB	I	08/09	9,5	9,108	9	2,15	889	10,6	Thomas Lindsjö
	291		Mats & Arne Arkitektkontor AB	A	07/08	9,5	8,4	8	1,20	770	5,4	Arne Algeröd
	292	260	Mårtensson & Håkanson Byggrådgivare AB	PM	08/09	9,5	10,6	8	0,11	711	4,0	ingen vd
STD	293		EPG Konsult Samordnad VVS-Teknik AB	M	08/09	9,4	8,9	12	0,65	504	3,4	Gillis Wendt
	294	285	Coordia Consult AB	CE, PM	08/09	9,3	9,2	6	0,42	859	3,1	Jan Eriksson
	295		Lincona Byggkonsult AB	CE	08/09	9,2	9,3	15	0,06	411	3,3	Dan Johansson
STD	296	286	FIGURA arkitekter AB	A	07/08	9,2	9,2	11	0,60	599	3,4	Richard Nilsson
STD	297		CondoConsult AB	CE	08	9,1	8,6	8	0,80	817	3,7	Bengt Erik Gustafsson
	298	262	Pontus Möller Arkitekter AB	A	08	9,0	10,4	15	0,72	475	1,9	Pontus Möller
	299	277	Inelko AB	I	08/09	9,0	9,6	10	0,92	711	3,2	Steve Olsson
STD	300	247	Claes Dahlgren Arkitektkontor AB	A	08	8,9	12,1	7	2,77	964	5,6	Claes Dahlgren

The Nordic market



The Nordic section in the Sector Review is produced in co-operation with our colleagues in Finland, Norway, Denmark and Iceland. FRI gives an account of developments on the Danish market and RIF on the Norwegian market. SKOL presents the Finnish market for engineering consultancies and ATL presents the Finnish architectural market. The Icelandic market is presented jointly by FRV and the architects' organisation FSSA.

The top 100 Nordic architectural groups

	08/09	07/08	Group	Annual Report	Country	Employees	Previous year)	Turnover	
STD	1	1	White arkitekter AB	08	SE	466	445	495,8	msek
STD	2	2	SWECO Architects AB	08	SE	368		494,2	msek
	3	3	Arkitektfirmaet C.F. Møller	08	DK	313	294	260,3	mdkk
	4	5	LINK Signatur Group	08	NO	250	201	186,7	mnok
	5	4	Arkitema K/S	08	DK	250	242	206,3	mdkk
STD	6	10	Tengbom	08	SE	182	141	174,2	msek
STD	7	9	Temagruppen Sverige AB	08	SE	157	148	165,5	msek
	8	8	Årstiderne Arkitekter A/S	*07/08	DK	155	155	110,0	mdkk
	9	6	Henning Larsen Architects	07/08	DK	150	150	150,2	mdkk
	10	12	3XNielsen A/S	07/08	DK	150	108	104,4	mdkk
	11	11	DARK Gruppen Arkitekter AS	08	NO	120	109	127,0	mnok
STD	12	14	Wingårdh-koncernen	08	SE	116	98	139,2	msek
	13	7	Arkitekterne Schmidt, Hammer & Lassen K/S	08	DK	110	130	123,5	mdkk
	14	13	Pöyry Architects Oy	08	FIN	107	99	10,5	meur
	15	17	PLH Arkitekter AS	08	DK	100	86	92,0	mdkk
	16	15	Snøhetta AS	08	NO	99	90	316,9	mnok
STD	17	20	NYRÉNS Arkitektkontor AB	08	SE	91	75	104,1	msek
STD	18		Arkitekterna Krook & Tjäder AB	08	SE	85	66	76,5	msek
	19	18	Narud-Stokke-Wiig A/S (Group)	08	NO	81	82	130,2	mnok
FRI	20	16	DAI Gruppen A/S	08	DK	81	87	50,9	mdkk
	21	19	Hvidt & Mølgaard A/S Arkitektfirma	08	DK	80	80	52,6	mdkk
STD	22	25	FOJAB Arkitekter AB (Group)	08/09	SE	79	66	139,1	msek
	23	21	JJW Arkitekter A/S	08	DK	75	72	52,1	mdkk
	24	24	Creo Arkitekter A/S	*08	DK	70	70	68,0	mdkk
	25	23	Dissing + Weitling Arkitektfirma A/S	*08	DK	70	70	33,9	mdkk
	26	38	KPF Arkitekter A/S	08	DK	65	50	53,1	mdkk
	27	28	KHR Arkitekter AS	08	DK	65	61	50,2	mdkk
STD	28	34	AROSgruppen Arkitekter AB	07/08	SE	63	63	66,4	msek
STD	29	33	AIX Arkitekter AB	08/09	SE	62	57	65,6	msek
ATL	30	29	Arkkitehtitoimisto Larkas & Laine Oy	08	FIN	62	59	5,5	meur
STD	31	30	Liljewall Arkitekter AB	08	SE	60	58	66,9	msek
STD	32	31	Brunnberg & Forshed Arkitektkontor AB	08	SE	59	57	71,6	msek
ATL	33	45	Arkkitehtitoimisto Pekka Helin & Co Oy	08/09	FIN	56	45	6,2	meur
	34	35	Mangor & Nagel Arkitektfirma A/S	*06/07	DK	55	55	38,7	mdkk
	35	27	Niels Torp AS Arkitekter	08	NO	52	63	62,0	mnok
	36	40	Strategisk Arkitektur Fries & Ekeroth AB	08	SE	50	49	55,8	msek
	37	41	Arkitektkontoret Hille+Melbye A/S	08	NO	50	46	59,5	mnok
	38	36	Erik Møller Arkitekter A/S	07/08	DK	50	52	43,1	mdkk
	39	22	BIG / Bjarke Ingels Group	08	DK	50	71	38,0	mdkk
	40	37	Aarhus Arkitekterne A/S	*06/06	DK	50	50	35,0	mdkk
ATL	41	56	Innovarch Architects Oy	08	FIN	50	37	5,3	meur
	42	39	Friis & Moltke A/S	07	DK	49	50	29,0	mdkk
STD	43		ÅWL Arkitekter AB	08/09	SE	47	44	60,2	msek
STD	44	61	Reflex Arkitekter AB	07/08	SE	47	36	44,9	msek
	45		Kullegaard Arkitekter A/S	*07/08	DK	46	29	36,0	mdkk
ATL	46	54	Arkkitehtitoimisto SARC Oy	07/08	FIN	45	40	3,3	meur
FSSA	47	44	Arkís ehf.	08	IS	45	45	500,7	miskr
STD	48	43	Arkitekthuset Monarken AB	08/09	SE	42	45	39,6	msek
STD	49	79	BAU Arkitekter AB	08	SE	42	30	37,6	msek
STD	50	47	Mondo Arkitekter AB (fusion with FRS Arcitechts, March 2009)	08	SE	42	45	35,9	msek

	08/09	07/08	Group	Annual Report	Country	Employees	Previous year)	Turnover	
	51	50	Medplan AS arkitekter	08	NO	42	41	63,3	mnok
STD	52	57	BSK Arkitekter AB	08	SE	41	37	59,0	msek
STD	53	72	A5 Arkitekter & Ingenjörer AB (Tengbom Dec 2008) 7 months	08/09	SE	41	37	24,5	msek
	54		Selberg Arkitektkontor AS (Reinertsen group)	08	NO	40		40,5	mnok
STD	55	67	Equator Stockholm AB	08	SE	40	34	47,1	msek
	56	94	Lund & Slaatto Arkitekter AS	08	NO	40	29	43,0	mnok
	57		RUMarkitekter A/S	08/09	DK	40	40	39,3	mdkk
	58	52	Gottlieb & Paludan A/S Arkitekter	08	DK	40	40	36,0	mdkk
	59	62	Juul Frost Arkitekter A/S	07	DK	40	36	26,0	mdkk
	60	91	Gehl Architects A/S	07/08	DK	40	30	25,6	mdkk
	61	53	Arkitektfirmaet Kjaer & Richter A/S	*06/07	DK	40	40	25,0	mdkk
FSSA	62	42	THG Arkitektar	08	IS	40	45	608,3	miskr
FSSA	63	86	VA arkitektar	08	IS	40	30	268,7	miskr
STD	64		Semrén & Månsson Arkitektkontor AB	07/08	SE	39	24	39,7	msek
	65	55	Lpo Arkitekter As	08	NO	39	39	46,7	mnok
	66	49	AMB Arkitekter AS	08	NO	38	42	49,2	mnok
	67		Wester+Elsner Arkitekter AB	08/09	SE	37	33	44,6	msek
STD	68	58	Scheiwiller Svensson Arkitektkontor AB	08/09	SE	37	36	41,0	msek
STD	69	46	Arkitektbyrån AB i Göteborg	08	SE	37	45	32,0	msek
	70		WITRAZ Arkitekter K/S	08	DK	37	29	27,3	mdkk
	71	75	Solem Hartmann Arkitekter AS	08	NO	35	31	33,1	mnok
STD	72		SYD ARK Konstruera AB	08/09	SE	34	14	32,3	msek
STD	73	63	Lund & Valentin Arkitekter AB	08/09	SE	34	35	27,5	msek
	74	68	C&W Arkitekter A/S	*07/08	DK	34	34	36,0	mdkk
	75	42	CUBO Arkitekter A/S	07/08	DK	34	34	35,8	mdkk
SKOL/ATL	76	77	KS OY Arkkitehtuuria	08	FIN	34	31	3,4	meur
	77	66	SAHL Arkitekter A/S	*07/08	DK	33	34	36,0	mdkk
	78	70	Lundgaard & Tranberg Arkitekter A/S	07/08	DK	33	33	25,0	mdkk
ATL	79		Arkkitehtitoimisto Sigge Oy	08	FIN	33	28	2,6	meur
FSSA	80		Batteríið ehf.	08	IS	33		283,0	miskr
STD	81	85	AG Arkitekter AB	08	SE	32	30	32,6	msek
ATL	82		Uki Arkkitehdit Oy	08	FIN	32		2,2	meur
STD	83		Thomas Eriksson Arkitektkontor AB	08/09	SE	31	33	29,9	msek
	84	59	Heggelund & Koxvold Arkitekter AS	08	NO	31	36	44,3	mnok
	85	83	Ramböll (Aros) Arkitekter AS	08	NO	31	30	30,1	mnok
	86	84	GPP Arkitekter A/S (fd Gjørtz, Pank & Partnere A/S)	08	DK	31	30	24,0	mdkk
	87	90	Tegnestuen Vandkunsten ApS	07	DK	31	30	19,3	mdkk
STD	88		Archus Arosia Arkitekter AB	08	SE	30	28	30,3	msek
STD	89		BSV Arkitekter & Ingenjörer AB	08	SE	30		24,7	msek
	90	82	AK 83 Arkitektkontoret A/S	07/08	DK	30	30	31,7	mdkk
	91	87	Cebra Arkitekter A/S	07	DK	30	30	25,0	mdkk
	92	88	Arkitektfirmaet TKT A/S	07/08	DK	30	30	25,0	mdkk
	93	92	Arkitektfirmaet Hou & Partnere A/S	08	DK	30	30	21,5	mdkk
ATL	94	100	Arkkitehtitoimisto Laatio Oy	08	FIN	30	29	3,0	meur
RIF	95		Artec Prosjekt Team As	08	NO	29		34,1	mnok
	96	99	ABAKO Arkitektkontor AB	08	SE	29	29	23,5	msek
STD	97	95	Pyramiden Arkitekter i Göteborg AB	08	SE	29	29	19,3	msek
	98	48	Arcasa Arkitekter AS	08	NO	29	43	54,9	mnok
	99	73	Lund Hagem Arkitekter AS	08	NO	29	32	46,0	mnok
	100	60	Per Knudsen Arkitektkontor AS	08	NO	29	36	32,8	mnok

THE DANISH MARKET

About FRI

The Danish Association of Consulting Engineers (FRI), founded in 1904, is a trade association for Danish consultancy firms providing independent consultancy services on market terms. FRI is a part of the Confederation of Danish Industries (DI).

390 firms are members of FRI and they employ together more than 20,000 people in Denmark and abroad. The association is the only trade association for independent technical consultants in Denmark.

The objective of FRI is to support its member firms by contributing to improving their business conditions, strengthening the industry's framework conditions, profiling the industry and increasing its recognition on the national and international levels.

FRI is an association for firms. It focuses on business matters and has established good liaisons with authorities and other partners. The association attempts as far as possible to gain influence on the drafting of framework conditions and legislation affecting market conditions in the industry.

Internationally, the association is a member of FIDIC and, in Europe it is a member of EFCA.

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Domestic and international growth in 2008 and first half of 2009 – in spite of the crisis

In spite of the current financial crisis, which has had a significant impact on the global consulting engineering industry, the Danish consultancy firms have fared sensibly through the crisis. In spite of the accelerating crisis, the consulting engineering industry experienced a growth in gross revenue of 14 % in 2008 corresponding to industry revenue of DKK 10.7 billion. It is estimated, that total industry gross revenue will grow to DKK 11.1 billion in 2009. In 2008 the companies saw a growth in export revenue of 10 %. Throughout 2008 and 2009 growth in the domestic market has been particularly strong within the infrastructure, energy and environmental sectors, while the building sector continues its downturn. Industry exports have grown by a rate of 12 % annually since 2003. In 2008 the export revenue for the members of FRI was DKK 2.2 billion, or equal to 20 % of total revenue. In addition to export revenue, Danish consultancies generated substantial revenues in foreign subsidiaries. In 2009 it is expected that revenue generated through exports and by subsidiaries abroad, will equal the value of revenue generated in Denmark by Danish firms.

The high levels of growth have been achieved without severe reductions of the industry's profit margin. However the firms have experienced a reduced profit margin compared to 2007.

Sector market performance

The performance of the Danish consultancy industry shows that its traditional sectors Building and Construction combined account for 56% of revenue. Other distinctive sectors are Environment and Energy, accounting for 14% and 15% of industry revenue respectively.

Outlook

The forecasts for 2009 regarding earnings and revenue in the Danish consultancy industry indicate that revenue will grow by 3 % on the previous year and that the average profit margin will remain at the current level of between 5 and 6 percent (EBIT).

The majority of consulting companies in Denmark expect stagnating growth in the course of the next 6-12 months. In the building sector, the biggest challenge to continued growth remains the lack of new orders on the 6-12 months horizon, while the infrastructure sector faces a very different task: shortage of staff. Hence the optimistic view of the infrastructure sector towards the future order stock has resulted in a number of engineers being reallocated from building to infrastructure.

Continued growth in Danish GDP

The government expects GDP to decline by 3.2 % in 2009 and grow by 0.9 % in 2010. The Danish government forecasts a decline for 2009 of 10.6% in investments in residential construction and of 9.2% in corporate investments. In 2010, residential construction is set to decline by 3.6% and corporate investments are set to decline by 1.5%.

Increased government focus on the environment

The liberal-conservative government of Mr. Lars Løkke Rasmussen is currently following a program where three areas are of particular interest for the consulting engineering industry: an increased focus on environmental issues in preparation for the upcoming 2009 UN Climate summit in Copenhagen (COP-15), and substantial investments in infrastructure, particularly with focus on the national railways. Furthermore the government has launched a massive boost in public investment, aimed broadly to invest in schools, kindergartens, hospitals, roads and public transport in 2010. These investments are part of a government growth initiative aimed at taking Denmark out of the financial crisis.

Important infrastructure projects

The contours of a number of important infrastructure projects in the Danish market have emerged on the horizon. In January 2009 the Danish government launched a major investment initiative for infrastructure. The initiative focuses on improvement of the public transportation sector, in particular railways, and the handling of traffic congestions in and around the major cities in Denmark. With the initiative the government has allocated DKK 87 billion. This investment should be seen in addition to a number of other significant initiatives: the agreement between the Danish and the German government, to build a bridge across the Fehmarn Belt, a link close to 20 km long between Rødby, Denmark, and Puttgarten, Germany and the City Circle Metro Project in Copenhagen.

In the building sector it is expected that jobs in new construction and renovation will increase in 2010. The increase is expected, partly due to the reduced municipal facility ceiling.

Internationalisation and Company News 2009

Danish consultancy firms have in the last decades increased their presence internationally through the ownership of foreign subsidiaries and a permanent presence in the markets close to Denmark. The presence is particularly focused on the Nordic region and Europe and on global growth markets such as the Middle East and Asia. In 2006 the Middle East became the 2nd most valuable market for Danish consulting engineers, after the European Economic Area (EEA), this position has been unchanged since then. In 2009 the revenue generated outside of Denmark by Danish Consulting Engineering companies and their subsidiaries abroad is expected to equal the revenue generated in Denmark.

Rambøll wins largest consultancy contract

During 2008, Rambøll continued the fast growth of recent years. 2008 was yet another year where the Rambøll Group increased revenue, profit and the number of employees significantly.

In September 2009 Rambøll UK acquired RYB Konsult, a company which specialises in energy and environmental design, thereby expanding their building services capabilities in the UK. In November 2009 Rambøll Norway acquired Schønherr Norway AS, which strengthens Rambøll Norways position in landscape architecture. On the project side Rambøll has signed the biggest consultancy contract to date in Denmark by winning the project of renewing the Danish railway signalling system. The international consortium consists of Rambøll, Atkins, Emch+Berger and Parsons. Another significant project is that Rambøll is part of the consortium to design the world's longest combined road and rail tunnel, to link the Danish and German sides of the Fehmarnbelt. Together with COBE architects and SLETH, Rambøll is one of the consultants for the largest urban development project in Scandinavia, Nordhavnen in Copenhagen. The vision is that Nordhavnen is to set new standards for sustainable development. Finally, Rambøll is involved in the design of a new conference centre in Reykjavik, which is a part of a new harbour master plan for the capital of Iceland

COWI reports highest turnover ever

COWI A/S emerged from 2008 with an operating profit in line with the budgeted figures. The result was based on the highest turnover ever recorded and a strong organic growth.

In December 2008, COWI announced its acquisition of the world renowned specialists in bridge-design and building structures, the London based Flint & Neill in London with 40 employees. In February 2009 COWI was announced head of project management and planning of the new terminal 2 at Oslo airport Gardermoen, which is to be designed in compliance with new energy and environment strategies. Besides COWI, the interdisciplinary consortium behind the winning proposal includes the architect company Narud-Stokke-Wiig Norconsult, Aas-Jacobsen and Engineer Per Rasmussen. In April 2009 COWI A/S continued its expansion of engineering services in the Indian domestic market with the opening of its Chennai office. In June COWI acquired the leading Swedish consultancy firm Flygfältsbyrån (FB), thereby strengthening their position in Northern Europe. In July COWI opened a new office in Warsaw, Poland, specialising in infrastructural projects. Some of the main projects for COWI are the preliminary design for the world's longest suspension bridge – The Messina Bridge linking mainland Italy to Sicily – where COWI is the main advisor to the Eurolink consortium, which is responsible for the turnkey construction. Finally, COWI in collaboration with OBERMEYER has signed a contract for the bridge-design for Fehmarnbelt Fixed Link.

NIRAS wins prestigious prize for steelwork

At the end of 2008 NIRAS employed 1,270 employees of whom 25% work abroad. In 2009 NIRAS received the European federation ECCS', or the European Convention for Constructional Steelwork, prestigious award for its contribution to DR's new concert hall. The award is shared with the Danish Broadcast Corporation (DR), the client, and Ateliers Jean Nouvel, the architect. In November 2009, NIRAS announced that the work on multimedia facilities continues in Russia with the development of new "media city" for the Russian TV company NTV. Furthermore, NIRAS is advising DONG Inbicon on a second-generation bioethanol factory in Kalundborg.

In January 2009 NIRAS won the tender offered by the Turkish Ministry of Finance to plan and design a new port in Turkey's Black Sea coast by Filyos. The task will include a container terminal and an oil terminal. The task will run over the next eighteen months and is a fee of DKK 29 million.

ALECTIA defies the crisis with two acquisitions this year

ALECTIA started 2009 with the acquisition of Maersk Construction, the building consulting service from Lindø Byg A/S in February. In May 2009, ALECTIA took over Tano FoodCon Group with 23 employees. The acquisition is part of ALECTIA's growth strategy and strengthens, the company's position as the leading consultant to the Danish and international food industry.

The two engineering consultancies Atkins Denmark and Grontmij / Carl

Bro have jointly signed the contract to design a rail project for Rail Net Denmark; capital budget totalling DKK 800 million. The design is going to be a major logistical assignment including about 70,000 hours of work to be distributed almost equally between the two companies, and a number of subconsultants. Atkins also carries out the design of interlocking engineering within the same project, including about 20,000 hours of work.

Grontmij | Carl Bro restores water supply on Cyprus

In June 2009 Grontmij | Carl Bro recently won the contract for a new sewerage system and an extension of the existing water treatment plant in the seaport of Larnaca in Cyprus. The six-year contract includes planning and supervision of the establishment of 300 kilometres of sewer pipes, 13 pump stations, and improvements to treatment of wastewater. In addition to providing pure bathing water for Larnaca's holiday makers, the project will help to ensure that Cyprus complies with the EU environmental requirements, explained.

Moe & Brødsgaard continues to expand in Norway

The subsidiary of Moe & Brødsgaard in Norway Moe Norge expanded in 2009 by acquiring the Norwegian consulting engineering company PolyPlan, thereby adding leading expertise in installations for bathing and swimming facilities to the company. In addition to Moe & Brødsgaard, Esbensen Rådgivende Ingeniører expanded their activities in Norway by signing the contract for planning a new exhibition building, Forum, in Stavanger, which also comprises sports hall and a hotel.

Orbicon and Leif Hansen Engineering merge

In May, the breaking news was the merger of the Environmental consultants Orbicon and the building and construction consultants Leif Hansen Engineering. The merged company Orbicon/Leif Hansen is positioned amongst the biggest consultancy firms in Denmark with 600 employees and a turnover of half a billion Danish kroner.

An increase in foreign owned companies in Denmark

In the last couple of years, more foreign consultants have established a presence in the Danish market. The two most recent are Norconsult of Norway and UK based Buro Happold.

Architects retain their international stronghold

In 2008 and 2009 Danish architects continued to win spectacular projects abroad. C. F. Møller Architects, in collaboration with Kristin Jarmund Arkitekter, has won a major competition to design a spectacular new landmark project in the city of Oslo. BIG Architects are designing the Danish pavilion for the Shanghai world expo 2010 and the masterplan for the Zira Island project in Azerbaijan; and Schmidt Hammer Lassen has won a major education project in Aachen, Germany.

In 2008 the Danish architects experienced a small increase in foreign projects. From 2007 to 2008 the foreign turnover increased by almost 2 per cent to 63 EUR million. As in 2007 14 per cent of the total turnover derives from projects abroad. Europe is undisputed the largest market for exports of Danish architecture and accounts for approx. 91 percent of the foreign market.

Thomas Overgaard Jensen
and Henrik Garver, FRI

The top 100 Danish consulting engineering and architectural groups

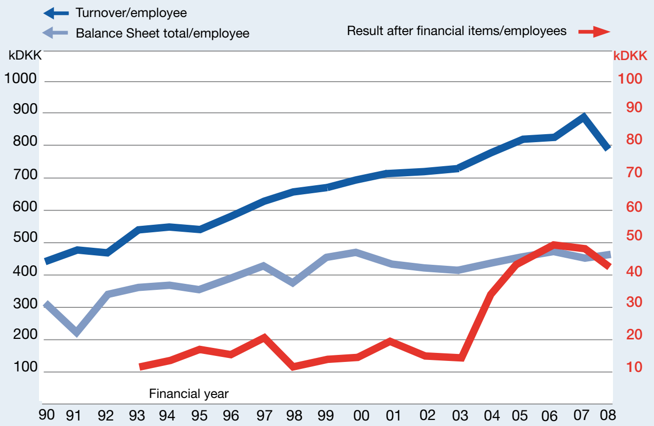
	08/09	07/08	Group	Services	Annual Report	Turn over MDKK	(Previous year)	Average number of employees	Tot. Balance sheet MDKK	CEO/Managing director (December 2009)
FRI	1	1	Rambøll Gruppen A/S	MD	08	5639,8	4739,6	7758	3,115.3	Flemming Bligaard Pedersen
FRI	2	2	COWI koncernen	MD	08	3498,0	3031,3	4475	2387,4	Lars-Peter Søbye
FRI	3	3	Grontmij Carl Bro A/S	MD	08	1237,3	1093,8	1177	622,5	Birgit W. Nørgaard
FRI	4	4	NIRAS-gruppen A/S	MD	08	911,0	806,5	1124	504,0	Carsten Toft Boesen
FRI	5	5	Alectia	CE,PM	08	584,4	566,8	757	358,8	Ingelise Bogason
FRI	6	8	Atkins Danmark A/S	MD	08/09	391,1	233,5	309	146,5	Palle Beck Thomsen
FRI	7	6	Orbicon A/S (fusion with FLH may 2009)	MD	08	271,6	237,1	320	128,8	Jesper Nybo Andersen
	8	7	Arkitektfirmaet C.F. Møller	A	08	260,3	262,8	313	120,5	Lars Kirkegaard, Mads Møller
FRI	9	10	Moe & Brødsgaard A/S	MD	08	220,9	186,4	293	145,1	Christian Listov-Saabye
	10	12	Arkitema K/S	A,PM	08	206,3	166,0	250		Peter Berg
FRI	11	49	Energi- & Ingeniørgruppen ApS	Enr,CE	08	182,8	33,3	146	156,4	Ulf Christensen
FRI	12	14	ISC Rådgivende Ingeniører A/S	MD	08	176,0	152,0	190	255,0	Kjeld Thomsen
FRI	13	11	O.B.H-Gruppen A/S	MD	08	172,2	181,0	206	105,3	Børge Gunnar Danielsen
	14	13	Henning Larsen Architects	A	07/08	150,2	150,2	150	73,4	Mette Kynne Frandsen
FRI	15	9	FLH Koncernen Aps (merged with Strunge Hartwigsen in march 2009)	MD	08	137,1	189,0	300	60,2	Lars Kragh
FRI	16	15	EKJ Rådgivende Ingeniorer AS	MD	08/09	128,2	119,8	157	101,8	Jørgen Nielsen
	17	16	Arkitekterne Schmidt, Hammer & Lassen K/S	A	08	123,5	114,7	110		Bente Damgaard
	18	17	Årstiderne Arkitekter A/S	A	*07/08	110,0	110,0	155		Per Laustsen
	19	18	3XNielsen A/S	A	07/08	104,4	104,4	150	62,5	Bo Boje Larsen
	20	19	Midtconsult A/S	MD	*07/08	100,0	100,0	135	36,8	Jens Lauritsen
FRI	21	20	Mogens Balslev Rådgivende Ingeniører A/S	MD	08/09	93,9	89,4	110	93,5	Benny Andersen
	22	21	PLH Arkitekter AS	A	08	92,0	81,9	100	40,7	Torben Hjortsø, Jan Sander Fredriksen
FRI	23	22	Bascon Arkitekt-og Ingeniørfirma A/S	PM,CE, A,	08/09	78,9	81,6	109	29,2	Lars Svenningsen
	24	25	White Arkitekter A/S	A	07/08	72,2	70,0	71	37,3	Claus Jørgensen, Frans Andersen
FRI	25	26	Søren Jensen A/S Rådgivende Ingeniører	MD	07/08	68,8	69,3	92	44,1	Erik V. Jensen
	26	28	Creo Arkitekter A/S	A	*08	68,0	56,0	70	24,6	Finn Sørensen
FRI	27	29	Dines Jørgensen & Co A/S	CE, M, PM	07/08	53,7	53,7	63	24,8	Arne Peter Jørgensen
	28	52	KPF Arkitekter A/S	A	08	53,10	31,0	65	38,1	Michael Reventlow-Mourier
	29	32	Hvidt & Mølgaard A/S Arkitektfirma	A	08	52,6	49,4	80	29,9	Peter Holsøe
	30	33	JJW Arkitekter A/S	A	08	52,1	46,8	75	22,7	Anders Holst Jensen
FRI	31	27	DAI Gruppen A/S	A, MD	08	50,9	68,4	81	29,4	Jørgen H. Therkelsen
	32	31	KHR Arkitekter AS	A	08	50,2	50,2	65	33,3	Henrik Danielsen
FRI	33	34	Hundsbaek & Henriksen A/S	MD	07/08	45,4	44,8	55	24,4	Niels Lerbech Sørensen
	34	35	ProInvent Gruppen A/S	I	*07/08	43,4	40,0	51	21,4	Leif Dalum
	35	36	Erik Møller Arkitekter A/S	A	07/08	43,1	38,8	50	26,1	Hans Henrik Høilund
FRI	36	39	DGE Dansk Geo-Servex A/S	Env	08	41,9	37,0	57	18,8	Poul Erik Jensen
FRI	37	40	ÅF Hansen & Henneberg, København A/S	PM	08	41,8	36,1	53	20,7	Per Seidelin
	38	43	Dansk Teknologi A/S	I	08/09	41,4	35,10	25	24,9	Thomas Lund
FRI	39	46	Skude & Jacobsen A/S	MD	07/08	40,7	34,92	50	47,9	Peter Islev
FRI	40	68	Brix & Kamp A/S	CE,E,I	08	39,8	26,02	60	18,0	Bent Vanggaard
	41	24	Kuben Management A/S	PM	*08	39,7	74,00	45	23,7	Carsten West
	42	54	RUMarkitekter A/S	A	08/09	39,3	30,00	40	13,4	Anders Johansen
	43	73	SWECO Architects A/S	A, PM	08	38,8	25,00	35	14,3	Lone Busk
	44	37	Mangor & Nagel Arkitektfirma A/S	A	*06/07	38,7	38,70	55		Torben Nagel
FRI	45	48	Sloth-Møller Rådgivende Ingeniører A/S	CE	08	38,5	33,43	56	18,9	Jørn Plauborg
	46		BIG / Bjarke Ingels Group	A	08	38,0	42,52	50	12,5	Sheela Maini Søgaard
FRI	47	56	Jørgen Wessberg A/S Rådgivende Ingeniører	CE,M,E	08	37,2	30,00	30	46,1	Stig Wessberg
	48	41	C&W Arkitekter A/S f d Clausen & Weber A/S *	A	*07/08	36,0	36,00	34	19,4	Michael Petersen
	49	50	Gottlieb & Paludan A/S Arkitekter	A, PM, CE	08	36,0	32,00	40	14,8	Jesper Gottlieb
FRI	50	64	Taekker Rådgivende Ingeniörer A/S	CE	*07/08	36,0	27,44	45	20,2	Jørn Tækker
	51	65	Peter Jahn & Partnere A/S	CE, A	07/08	36,0	27,00	30	15,9	Peter Jahn, Claus Dam
	52	70	SAHL Arkitekter A/S	A	*07/08	36,0	25,40	33	15,6	Michael B. Hylleborg
	53	90	Kullegaard Arkitekter A/S	A	*07/08	36,0	19,00	46	15,1	Thomas Kullegaard
	54	42	CUBO Arkitekter A/S	A	07/08	35,8	35,80	34	17,5	Peter Dalsgaard
	55	30	Vilhelm Lauritzen AS	A	08	35,8	53,18	42		Søren Daugbjerg
	56	44	Aarhus Arkitekterne A/S	A	*06/06	35,0	35,00	50		Tommy Falch
	57	47	Dansk Miljörådgivning A/S	Env	06/07	34,6	34,60	41	13,1	Mikael E. Nielsen
	58	23	Dissing + Weitling Arkitektfirma A/S	A	*08	33,9	78,48	70	51,7	Lars Søndergaard
	59	38	DOMUS arkitekter A/S	A, PM	08	33,2	37,10	27	19,6	Jørgen Skaaning Trolle
	60	51	AK 83 Arkitektkontoret A/S	A	07/08	31,7	31,65	30	13,4	
FRI	61		Esbensen Rådgivende Ingeniører A/S		08	31,6	28,29	44	55,1	Torben Esbensen
FRI	62	61	Al-Gruppen A/S	A,CE	08	31,4	28,81	40	13,2	Jan Bruus Sørensen
FRI	63	60	Lyngkilde A/S Rådgivende Ingeniørfirma A/S	CE	07/08	30,9	29,00	34	21,3	Claus H. Larsen
FRI	64	53	Tri-Consult A/S	MD	07/08	30,8	30,72	41	14,2	Søren Ibsen
FRI	65	58	Dominia AS, Rådgivende Ingeniører	CE, E, M, PM	08	30,6	29,10	36	18,6	Kjeld Christiansen
FRI	66	63	Wissenberg A/S	CE	08	30,4	28,30	42	22,5	Lars Bendix Christensen

FRI = Member of FRI, the Danish Association of Consulting Engineers (*) = lack of conforming figure/proforma/assumed – = missing figure PM = Project Management, A = Architecture, CE = Civil/Structural Engineering, Env = Environment, Enr = Energy, E = Electrical,M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

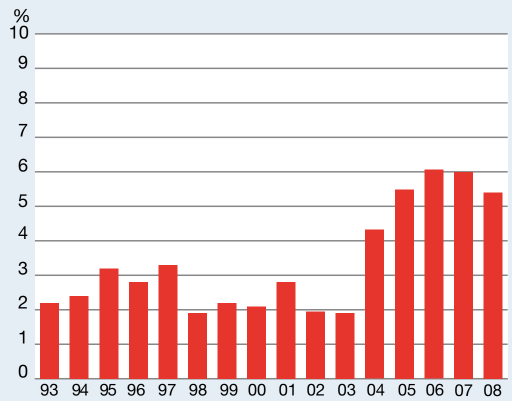
The top 100 Danish, cont

	08/09	07/08	Group	Services	Annual Report	Turn over MDKK	(Previous year)	Average number of employees	Tot. Balance sheet MDKK	CEO/Managing director (December 2009)
	67	99	Rørbaek og Møller Arkitekter ApS	A	08/09	30,1	16,44	27	28,1	Lars Møller
FRI	68		Stokvad & Kerstens Rådgivende Ingeniører A/S		08/09	30,0		21	10,4	Ejnar Kerstens
FRI	69	71	Strunge & Hartvigsen A/S (Merged with Leif Hansen Engineering in march 2009)	CE	08	29,0	25,04	18	14,5	Kjeld Hartvigsen
	70	59	Friis & Moltke A/S	A	07	29,0	29,00	49	18,7	Palle Hurwitz
FRI	71	57	Nielsen & Risager A/S	MD	08	28,2	29,56	39	15,1	Ib Rasmussen
	72	79	WITRAZ Arkitekter K/S	A	08	27,3	23,00	37		Per Zwinge
	73	45	Develco A/S	I	08/09	27,1	35,00	36	14,0	Kresten Nørgaard Christensen
	74	69	Juul Frost Arkitekter A/S	A	07	26,0	25,40	40		Helle Juul, Fleming Frost
	75	93	Gehl Architects A/S	A	07/08	25,6	18,70	40		Jan Gehl
FRI	76	67	Lemming & Eriksson Rådgivende Ingeniører A/S	CE	08/09	25,0	26,65	38	13,2	Knud Bay
	77	72	Arkitektfirmaet Kjaer & Richter A/S	A	*06/07	25,0	25,00	40		Dan Christensen
	78	74	Lundgaard & Tranberg Arkitekter A/S	A	07/08	25,0	25,00	33	31,9	Lene Tranberg
	79	75	Cebra Arkitekter A/S	A	07	25,0	25,00	30	5,7	Mikkel Frost
	80	76	Arkitektfirmaet TKT A/S	A	07/08	25,0	25,00	30	15,3	Sören Vestergaard
FRI	81	77	Oluf Jørgensen Gruppen	M,E,Enr	07/08	24,2	24,22	22	15,4	Kaj Møller
	82	55	GPP Arkitekter A/S (fd Gjørtz, Pank & Partnere A/S)	A	08	23,9	30,00	31	19,2	Lars Pank
	83	86	Emcon A/S	PM,CE	08	23,9	20,18	17	12,2	Niels Anker Jørgensen
FRI	84		Viborg Ingeniørerne A/S		08	23,7		25	13,8	Erik S. Damgaard
FRI	85	85	Grue & Hornstrup Rådgivende Ingeniörer A/S	CE, E	07/08	23,3	20,99	12	11,1	Lars Grue
FRI	86	62	Hansen, Carlsen & Frølund A/S	CE	07/08	23,1	28,50	38	11,8	Rene Almind
	87	80	Rubow Arkitekter A/S	A	*07	23,0	23,00	29	8,9	Martin Rubow
FRI	88	83	Ingeniørfirmaet P.A. Pedersen A/S	E,Enr,I,PM	07/08	22,5	22,00	28	56,3	Lars Otto Kjaer
FRI	89	78	Consia Consultants A/S	Env	08	22,2	23,06	8		Erling Rask
FRI	90	97	Henneby Nielsen Rådgivende Ingeniörer A/S	CE	08	21,9	17,30	35	6,0	Jörn Henneby Nielsen
	91	100	Arkitektfirmaet Hou & Partnere A/S	A	08	21,5	16,36	30	6,6	Ib Jensen Hou
	92		KANT Arkitekter A/S	A	*08	21,4	15,00	22		Klaus Holm Jensen
FRI	93	89	Strunge Jensen A/S	M,E,CE	*08/09	20,0	19,12	27		Jesper Strunge Jensen
FRI	94	95	Henrik Larsen Rådgivende Ingeniörer A/S	CE	08	20,0	18,15	22	8,4	Henrik Larsen
	95	87	Triarc A/S Arkitekter	A	08	19,7	19,68	18	7,6	Thomas Hvass
	96	88	Tegnestuen Vandkunsten ApS	A	07	19,3	19,32	31		Steffen Kragh
	97	91	LB-Consult A/S	CE,M,E	07	18,9	18,87	24	6,3	Lars Bager
	98	81	TNT Arkitekter A/S	A,PM,CE,Env	08	18,8	22,84	28	3,5	Ole Anstrup
	99	92	Claus Bjarrum Arkitekter A/S	A	07	18,7	18,72	22		S. Heegaard
FRI	100	94	Torkil Laursen ApS Rådgivende Ingeniørfirma	CE, PM	07/08	18,56	18,56	19	12,9	Jørgen Dueholm

The top 30 Danish groups



Result margins



As in Sweden, and other countries, it´s delicate to compare the performance of the large groups with that the midsized and smaller companies. In the last-mentioned categories the often several partner´s hard work have a comparatively more favourable effect on the companies´ turnover and profitability.

For the groups no 31-100 in the chart above the total turnover in 2008 increased with 7,6 % to some 2 112 MDKK (1 962 MDKK in 2007). The number of employees (FTE) only increased with 0,8 % to 2527 (2506). The turnover/employee therefore increased substantially to 836 kDKK (783). The earning/employee before tax decreased to some 90 kDKK (107). Converted to a result margin that means some 5,3 %. The average balance/employee was some 521 kDKK (457).

Key figures	for the top 30 groups	(previous year)
Turnover/employee	790' DKK	799' DKK
Earnings after financial items/employee	40' DKK	48' DKK
Balance sheet/employee	466' DKK	447' DKK

The total turnover for the top 30 groups increased with 14 % to some 15 190 MDKK (13 280). Using the same method the number of employees (FTE) increased with around 16 % to 19240 (16632). The result margin for the largest companies was 5,1 % (6,0).

THE NORWEGIAN MARKET

RIF Rådgivende Ingeniørers Forening

RIF is the branch organization forauthorised consulting companies in Norway. RIF member companies encompass both consulting engineers and other professions, and members' activities are chiefly associated with the building and construction market.

In 2009, RIF has 260 member companies employing in the region of 7 500 persons and represents approximately 70 % of the independent consultant engineer branch in Norway.

RIF works to ensure that member companies have the best possible framework conditions. RIF shall promote the interests of consultants and consulting companies in the public arena, with policymakers, public authorities and public and private employers.

RIF's activities are based on the following principles:

- To improve the framework conditions for competition, contracting and purchasing for the branch.
- To establish a presence through active participation in the media and in social debate.
- Be represented in important decision-making processes with customers and co-operating partners.
- To increase recruitment and attract young consultants to the branch.
- To contribute to the development of skills and expertise and revitalisation.

RIF is a member of EFCA and FIDIC.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Recession?

In common with other countries, Norway has experienced a downturn with a decline in the real economy during the last year. The financial crisis in the autumn of 2008 has affected the real economy and this has led to reduced activity in certain sections of the economy. This applies especially to export-oriented industries and the construction industry.

With an inflation rate of 2.0%, low unemployment (3.2%) and a reduction in GDP for mainland Norway of -1.0%, Norway, for the time being, has managed to emerge relatively unscathed from the global recession. Major activity in the oil and gas sector, with stable and high prices over several years has led to a large export surplus, which in 2009 is expected to surpass NOK 300 billion. This indicates a continued satisfactory level of activity in the Norwegian economy and for Norwegian consulting engineers into 2010.

In order to counteract excessively high cost levels and to moderate domestic consumption, Norway established the Government Pension Fund (The Global State Pension Fund) in the 1990s for future generations. The market value of this fund is expected in 2009 to reach NOK 2 600 billion.

Economic development is expected to improve in 2010, with growth in the Norwegian economy and in the business sector as a whole. In the building and construction sector, a fall in activity is anticipated; however, positive developments in the construction market related to public infrastructure projects and the energy sector are forecast. For consulting engineers, the situation has changed from an extremely high level activity to a good level of activity. In 2008, RIF increased by 10% in the number of employees to 7 500 distributed among 260 companies. The market has been relatively stable in 2009.

National priorities

Economic freedom to manoeuvre means that the social-democratic government that was re-elected in 2009 for a new 4-year period, is in a position to able to support common solutions and to continue policies that are founded on fairness and a sense of community. National priorities in the period 2010-2014 are to secure continued low levels of unemployment in Norway and to support the healthcare sector, schools and kindergartens. Differences in living standards will be evened out. Efforts in respect to communications, environmental issues, research and development will intensify. These plans have been concretised in the budgets for 2010 and will mean a further growth in publicly-financed operations and investments.

The crisis that disappeared?

In Norway, overall total building and construction investments increased considerably between 2005 and 2008, and reached an historical peak with total investments of NOK 266 billion in 2008 and an expected NOK 253 billion in 2009. In 2010 and 2011, investments are expected to fall to approximately NOK 242 billion. In the same period, the number of employees in the industry has increased from 192 000 to 228 000. This increase is due to the import of workers from the EU region – these are now leaving the country due to the general downturn in the levels of activity in the market. For 2010 and 2011, the number of employees is expected to fall to 200 000.

In 2009, the downturn in investments in the construction market is expected to be a little over 15%. House construction has fallen by 22% in 2009 and is expected to fall by a further 10% in 2010. In the office and business construction market (-27% in 2009), a further fall of 36% is expected in 2010. A similar downturn is expected in industrial and energy-related construction. Public building enterprises associated with education, health and administration are expected to increase by 5% in 2009 and 5% in 2010. Many construction projects in the private sector have been halted. Re-activation has been postponed, awaiting economic developments and an anticipated fall in the contract market. In order to reduce the impact of the downturn the state has introduced initiatives aimed at the construction industry and increased the number of its own construction enterprises.

Investments in construction projects have increased by 15% in 2009 and are expected to increase further in 2010. Investments in large oil and gas projects are reaching their final phases; however, public investment in roads, railways and other infrastructure is increasing noticeably in 2009 and 2010. The same applies to construction in other energy sectors associated with hydroelectric power and other renewable energy sources. The new national transport plan, presented in 2009, is progressive and budget approbations along with income from toll collection fees appears to be leading to an increased level of activity, also beyond 2011.

Consulting engineer have been affected by the economic downturn to a lesser degree than was anticipated. A considerable sector of the branch has not registered a downturn at all; however, in certain market segments and regions there has been somewhat less activity. Overall, in 2009, the market has been good; however, the challenges are expected to come in 2010.

Some major projects

New airport terminal Oslo Gardermoen: Terminal buildings, taxiways and aircraft aprons with associated technical infrastructure. On the land side; new access roads, traffic plazas, parking garage and technical infrastructure.

Bjørvika in Oslo: Development of a new district in Oslo. Major investments in a new National Opera, further development of a rail and public transport hub (Oslo S), new motorways and tunnels, development of the public sphere, planning and construction of major housing and industrial projects and the museum complex for the Edvard Munch and Stenersen collections.

Hospitals: New construction and rehabilitation of hospitals in all health regions in Norway. The largest of these projects are the new AHUS in Oslo, St. Olav’s Hospital in Trondheim, Haukeland Hospital in Bergen, Nordland Hospital in Bodø and the new Østfold Hospital.

Roads and railways: Several motorway projects in and around larger towns and cities. Further expansion of the motorway network in Østlandet and bridge/tunnel projects in order to link regions more effectively and to reduce avalanche hazards. Upgrades and construction of railways, in order to improve punctuality and to increase capacity. New city rail link in Bergen. Comprehensive project to construct a tramway from Bergen city centre to Rådal.

Energy: Traditionally, Norwegian energy and power production has been based on hydroelectric power. Several challenging and exciting projects are under planning and investment is taking place in several new hydroelectric projects. Older hydroelectric plants are being rebuilt and improved in order to increase capacity. New mini-power stations are also being built. There are also many interesting alternative energy projects under planning; wind power (offshore), land-based wind power, biogas and power and solar thermal generators. The initiation of major efforts will depend on the implementation of the EU Renewable Energy Directive and further development of the general framework for green certification.

Oil and gas in the north: In 2009, investments in development of oil and gas fields and land-based installations in Norway represented NOK 115 billion. However, investment is expected to fall from 2010 and onwards. Norwegian companies participate in the development of large oil and gas fields and associated infrastructure on the Russian side, in connection with the Stockman field in the Barents Sea and the development of an industrial site for oil and gas in Murmansk.

International projects: There is a great deal of competition and major economic and ethical risk associated with foreign aid projects. This issue, along with the increasingly global scope of aid and Norwegian foreign aid authorities’ framework agreements with other public enterprises, research institutions and ministries that are exempt from competition, has meant that Norwegian consulting engineer companies have altered their strategy for their international enterprises.

These changes have led to a move away from pure aid projects, towards involvement in investments in more developed countries and in purely commercial projects involving lower risk. The export share in 2004 was close to 10%; however it is expected to be around 5-8% in 2009.

Restructuring in the domestic market continues – where is it leading?

In Europe, major restructuring within the consulting industry is currently taking place, moving towards steadily larger international enterprises. We experience the same development taking place in the Nordic countries.

In Norway, over 40% of the industry is now wholly or partly owned by other Nordic enterprises and over 70% of employees in the industry work in the 6 largest companies.

Restructuring of the Norwegian market is characterised by the fact that large companies purchase smaller local enterprises to serve a local market and to create an inter-disciplinary resource base “in-house”, in order to meet the manpower requirements of major national projects.

In the first 6 months of 2009, Norconsult AS – which is the largest consultancy company in Norway, with an expected turnover of NOK 2.0 billion – purchased Sletten Finnmark AS and Mark och Vatten Ingenjörerna AB in Växjö, Sweden. After this acquisition, Norconsult now has an enterprise in Sweden with over 500 employees. In the autumn of 2009, the company also acquired Modalsli Prosjektering in Stavanger.

In the first 6 months of 2009, Ramböll Norge AS acquired the architect company A7 Arkitekter in Rendal, Grønn Strek AS in Kristiansand, Sivilingeniør Morten Fernløf AS in Østfold and Pascal Rådgivning AS in Rogaland. In the autumn of 2009, the company acquired Eurofins AS in Drammen and the landscape architect firm Schønherr Norge AS with enterprises in Agder and Rogaland

SWECO Norge AS acquired the Østland-based company EI Design in January.

In June, Hjellnes Consult AS purchased the company Brekke & Strand AS from Swedish ÅF.

PTL - Prosjekt- og Teknologiledelse AS - has taken over enterprises in TTRD Innovation Lab AS and K5 Prosjekt AS. In addition, the company has established a joint holding company in cooperation with Swepro Management AB (Swepro).

The Danish company Moe & Brødsgaard, via their Norwegian subsidiary Moe Norge AS, has acquired the company PolyPlan AS.

Clas Svantesson, RIF

The top 100 Norwegian consulting engineering and architectural groups

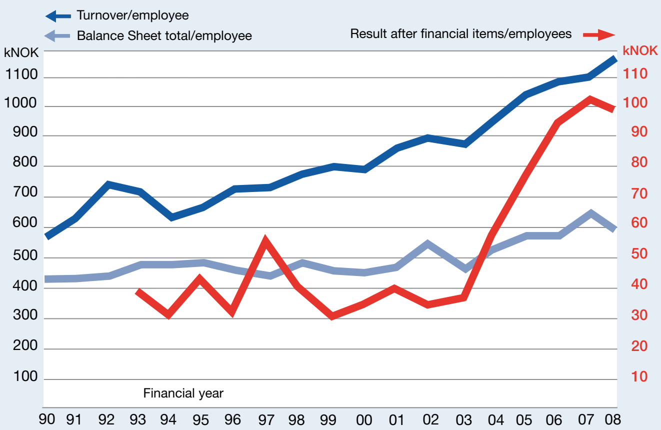
	08/09	07/08	Group	Services	Annual Report	Turn over MNOK	(Previous year)	Average number of employees	Tot. Balance sheet MNOK	CEO/Managing director (December 2009)
RIF	1	1	Norconsult AS-koncernen	MD	08	1911,4	1608,9	1610	954,8	John Nyheim
	2	6	Reinertsen Engineering	MD	08	1107,8	887,6	805	–	Erik Reinertsen
RIF	3	2	Multiconsult - koncernen	MD	08	1104,1	996,5	997	699,6	Håkon Sannum
RIF	4	5	SWECO Norge AS	MD	08	988,5	676,6	821	549,4	Vibecke Hverven
RIF	5	3	Rambøll Norge AS	MD	08	897,1	777,9	911	382,8	Jan Ove Holmen
RIF	6	4	COWI AS	MD	08	737,6	674,5	665	405,5	Christian Nørgaard Madsen
RIF	7	7	Asplan Viak koncernen	CE,Env,A	08	540,6	454,7	565	255,1	øyvind Mork
	8	24	Snøhetta AS	A	08	316,9	93,2	99	118,9	Ole E. Gustavsen
RIF	9	8	Dr. Ing. Aas-Jacobsen A/S - koncern	CE, PM	08	248,0	207,6	112	113,8	Trond A. Hagen
	10	12	LINK Signatur Gruppen	A, PM	08	186,7	175,2	250	88,3	Siri Legernes
RIF	11	14	Dr. techn. Olav Olsen A.S	CE, Enr,Env, PM	08	186,7	229,1	88	51,4	Tor Ole Olsen
RIF	12	16	PTL, Prosjekt- og Teknologiledelse AS	PM	08	179,3	146,9	138	75,3	Sven Erik Nørholm
RIF	13	9	Hjellnes Consult AS	MD	08	171,8	159,4	132	90,6	Geir Knudsen
	14	10	Techconsult AS	PM,I	08	167,6	178,5	73	50,1	Ronny Meyer
	15	15	OPAK A/S	PM,Env,Enr,E	08	138,6	120,0	133	42,9	Jan-Henry Hansen
	16	22	Narud-Stokke-Wiig A/S (koncernen)	A	08	130,2	104,8	81	45,6	Ole Wiig
	17	17	DARK Gruppen Arkitekter AS	A	08	126,9	112,6	120	59,1	Kjell Fek Östlie
	18	28	OEC Consulting AS	Enr,I,PM	08	125,9	106,6	51	57,8	Knut Hegge
	19	19	Rambøll Oil & Gas AS (dt Ramböll Danmark)	Enr,I	08	125,8	201,2	62	60,9	Henning Flingtorp
	20	13	Teleplan Consulting AS	E	08	114,5	137,8	72	80,5	Asgeir Myhre
RIF	21	20	ÅF Norge bolagen	M,E,Enr, I	08	112,4	88,5	114	44,4	Tore Fredriksen
	22	23	Kongsberg Devotek AS (co-ovned by Semcon AB)	I	08	101,9	95,0	84	32,5	Per Håvard Kleven
RIF	23	29	Agder Energi Nettkonsult AS	Enr	08	100,0	81,1	108	97,5	Kjell Myrann
RIF	24	21	Barlindhaug Consult AS (konsultbolaget)	MD	08	90,0	78,3	95	57,2	Arnor J. Jensen
RIF	25	25	Erichsen & Horgen A/S	M	08	80,2	76,3	80	42,1	Jon Kåre Beisvåg
RIF	26	26	Holte Consulting As	PM,CE,Enr	08	80,2	70,2	47	29,4	Are Strøm
RIF	27	34	Myklebust AS	CE, PM	08	64,5	57,9	58	32,3	Børge Bertelsen
RIF	28	30	ViaNova Plan og Trafikk AS	CE,PM	08	63,9	54,9	55	40,5	Tor Erik Saltnes
	29	41	Medplan AS arkitekter	A	08	63,3	41,8	42	24,9	Randi Mandt
	30	27	Niels Torp AS Arkitekter	A	08	61,9	68,8	52	35,8	Niels A. Torp
	31	32	Arkitektkontoret Hille+Melbye A/S	A,PM	08	59,5	49,4	50	28,2	Melvin Eiesland
	32	31	Arcasa Arkitekter AS	A	08	54,9	62,6	29	25,4	Per Erik Martinussen
	33	18	Arkitektfirmaet C.F. Møller Norge AS	A	08	54,3	88,9	44	17,8	Solveig Anette Erdahl
	34	33	Poyry Forest Industry AS	I	08	51,3	59,3	46	25,4	Espen Chr. Huth
	35	79	IndustriPlan AS	I	08	49,5	23,0	18	17,8	Vemund Isachsen
	36	35	AMB Arkitekter AS	A	08	49,2	47,1	38	17,4	Michael Bowe
RIF	37	39	A.L. Høyer AS	PM, CE	08	48,2	49,5	44	24,2	Liv Odden
	38	36	Arkitekterne Astrup & Hellern AS	A	08	48,1	52,0	26	20,5	Åke Letting
	39	42	Lpo Arkitekter As	A	08	46,7	42,6	39	21,8	Lisbeth Halseth
	40	49	Lund Hagem Arkitekter AS	A	08	46,0	33,2	29	18,1	Svein Lund
	41	46	Heggelund & Koxvold Arkitekter AS	A, PM	08	44,3	39,9	31	19,9	Jon Heggelund
	42	40	Poyry Energy AS	Enr	08	43,5	40,2	24	15,4	Per A. Sjursaether
	43	59	Lund & Slaatto Arkitekter AS	A	08	42,9	30,4	40	21,4	Bjarne Biørnstad
	44	37	IndustriConsult AS	I,MD	08	41,5	39,1	20	17,6	Jørgen E. Andersen
RIF	45	44	ECT AS	E,PM	08	41,1	32,9	39	17,0	Jan Henning Quist
RIF	46	38	F.Holm A.S (part of NEAS ASA since Nov 2007)	PM	08	39,9	40,5	42	12,8	Gregers Barfod
	47	47	Kåre Hagen konsernen	PM	08	39,8	34,1	38	14,7	Arne Surén
RIF	48	53	Sjåtil & Fornaess AS	CE,A,PM	08	39,1	33,1	31	14,3	Dag Fornaess
RIF	49	45	RG-prosjekt AS	CE,Env, PM	08	38,3	32,9	35	13,9	Atle Romstad
RIF	50		Artec Prosjekt Team As	CE, PM	08	34,1	18,1	29	14,2	Steinar Jacobsen
	51	99	Solem Hartmann Arkitekter AS	A	08	33,1	27,7	35	21,7	Lars Meland
	52	48	HRTB A/S Arkitekter	A	08	33,0	34,7	22	19,5	Ola Mowe
	53	50	Per Knudsen Arkitektkontor AS	A	08	32,8	32,4	29	12,1	Nina Kielland
RIF	54	61	Techno Consult Møre AS	M, E, Env, PM	08	31,9	31,9	22	10,8	Einar Meisfjord
RIF	55		Brekke & Strand AS	Env	08	30,7	27,4	24	13,8	Ingjerd Elise Aaraas
	56	52	Ramböll (Aros) Arkitekter AS	A	08	30,0	26,6	31	16,1	Ingeborg Hovland
RIF	57	65	Sivilingeniør Knut Finseth AS	CE	08	29,8	24,5	28	12,7	Pål Jevanord
RIF	58	54	Bygganalyse AS	PM	08	29,6	26,6	21	17,4	Otto Liebe
	59	89	L2 Arkitekter AS (fd Lunde & Løvseth arkitekter A/S)	A	08	28,9	25,6	16	11,9	Jon Flatebø
	60	66	Arkitektkontoret Børve og Borchsenius	A, PM,CE	08	28,7	25,2	29	20,3	Jan Olav Horgmo
RIF	61	60	Sørlandskonsult AS	MD	08	28,2	27,2	26	11,4	Gunnar Eickstedt
	62	92	FB Engineering AS (dt Flygfältsbyrån AB)	CE,I	08	27,6	21,7	32	15,6	Jørn Christen Johnsen
	63	72	Dyrvik Arkitekter A/S	A	08	27,6	24,7	21	8,4	Kristin Reeves
RIF	64	68	Prosjektutvikling Midt-Norge AS	PM,CE,E,M	08	27,3	22,7	21	12,1	Odd J. Tillerli
RIF	65	108	Nordplan AS	CE,A	08	27,3	20,3	33	13,5	Svein Rotevatn
	66	55	Eliassen og Lambertz-Nilssen Ark. AS	A	08	27,3	29,3	26	20,1	Anne Guri Grimsby

RIF = Member of RIF, the Association of Consulting Engineers, Norway (*) = lack of conforming figure/proforma/assumed – = missing figure PM = Project Management, A = Architecture, CE = Civil/Structural Engineering, Env = Environment, Enr = Energy, E = Electrical,M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

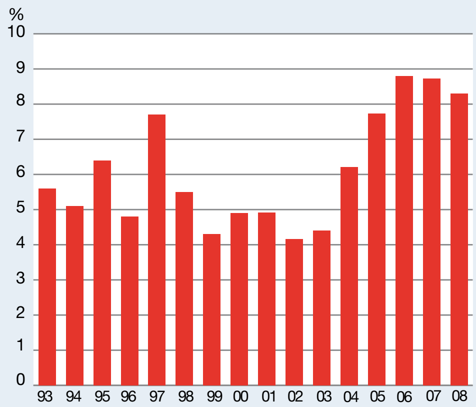
The top 100 Norwegian, cont

	08/09	07/08	Group	Services	Annual Report	Turn over MNOK	(Previous year)	Average number of employees	Tot. Balance sheet MNOK	CEO/Managing director (December 2009)
	67	98	Techni AS	I	08	27,2	28,7	35	9,1	Dag Almar Hansen
RIF	68	51	A.L. Høyer Skien AS	PM, CE	08	26,7	29,1	16	9,0	Rolf Lie
RIF	69	43	PABAS Ingeniør P.A. Bakkejord A.S	CE,PM,A	08	26,1	24,5	16	13,7	Ketil Bakkejord
RIF	70	73	Dimensjon Rådgivning AS	Env, CE, PM	08	25,4	22,7	20	11,1	Njål Erland
	71	76	Solheim + Jacobsen Arkitekter AS	A	08	24,2	22,3	17	12,9	Anne Sudbø
RIF	72	103	Itech AS	M,E	08	23,8	20,5	18	10,6	Tormod Berg
	73	74	Ingeniørfirmaet Malnes Og Endresen AS	E	08	23,1	21,2	22	8,7	Roger Malnes
RIF	74	88	Siv.ing Stener Sørensen AS	CE	08	22,6	21,6	21	16,7	Bo Gunsell
RIF	75		Gcon AS	CE	08	22,5	9,3	11	10,2	Lasse Grødum
	76	65	Arkitekterne Halvorsen & Reine AS	A	08	22,4	22,1	18	17,7	Karin Aarstrand Reine
RIF	77	63	Ingeniør Per Rasmussen AS	E	08	22,3	26,2	14	13,6	Per H. Rasmussen
RIF	78	127	Planstyring AS	PM, CE	08	22,2	17,3	21	7,7	Reidar Grande
	79	75	Abo Plan & Arkitektur As	A	08	22,1	22,6	19	9,0	Lars Christensen
	80	78	Brandsberg-Dahl´s Arkitektkontor AS	A	08	22,1	20,7	20	12,1	Hans Jørgen Mo
	81	83	Kosbergs Arkitektkontor AS	A	08	21,9	18,9	13	16,8	Kjell Kosberg
	82	93	Arstad Arkitekter AS	A	08	21,8	18,1	13	10,3	Kjell Erik Arstad
	83	91	A-Tek AS Ingeniørfirma	Enr, I, M	08	21,1	17,6	16	7,1	Jonny Edvardsen
	84	85	Kristiansen & Bernhardt Arkitektur Interiør AS	A	08	21,1	20,3	22	10,1	Thorvald Veire Bernhardt
	85	96	Meinich Arkitekter AS	A	08	21,0	18,9	16	7,0	Are Meinich
	86	62	Voll Arkitekter AS	A	08	20,9	22,0	18	10,9	Sigbjørn Berstad
RIF	87	104	ViaNova Kristinasand AS	CE	08	19,9	17,8	13	7,2	Tore A. Hals
	88	58	4B Arkitekter AS	A	08	19,6	23,2	18	8,9	Ole Stoveland
RIF	89	101	Staerk & Co AS	PM	08	19,6	18,1	20	8,7	Jan Lindland
RIF	90	86	Sivilingeniør Karl Knudsen As	PM, CE	08	19,5	18,5	17	8,0	Erik Johan Johnsen
RIF	91	102	ElectroNova AS	E	08	19,1	17,2	16	16,5	Trond Einar Kristiansen
RIF	92	97	EIC Engineering	PM, E	08	19,1	13,9	9	6,8	Erik Mortensen
RIF	93	100	Roar Jørgensen AS	PM,CE	08	19,1	17,3	19	8,8	Roar Jørgensen
RIF	94	118	SBV Consult AS	CE	08	18,8	17,1	15	9,1	Terje Hagen
	95	77	øKAW AS Arkitekter	A	08	18,6	23,7	22	6,8	Else Wehler
	96	81	Ottar Arkitekter AS	A	08	18,5	16,6	17	9,3	Tom Auland Ottar
	97	112	Arkitektgruppen CUBUS A/S	A	08	18,4	23,8	26	6,5	Erik Wald-Jacobsen
	98	121	Enerhaugen Arkitektkontor As	A	08	18,4	18,8	17	8,8	Harald Krokstrand
	99	71	LOF Arkitekter AS	A	08	18,3	20,6	13	7,1	Britt Ingebjørg Lien
RIF	100		Sinus AS	CE, Env	08	18,1	15,9	16	7,5	Tønnes Andreas Ognedal

The top 30 Norwegian groups



Result margins



As in Sweden, and other countries, it´s delicate to compare the performance of the large groups with that the midsized and smaller companies. In the last-mentioned categories the often several partner´s hard work have a comparatively more favourable effect on the companies´ turnover and profitability.

For the groups no 31-100 in the chart above the total turnover also in 2008 increased by 7 % to 2 112 MNOK (1975), while the number of employees (FTE) decreased by 1,6 % to some 1712 (1740). The turnover/employee increased to 1 233 kNOK (up from 1 233) and the earning/employee before tax was about 142 kNOK (153). Converted to a result margin this means some 11,5 % (13,5). The average balance/employee was some 560 kNOK (549). The Equity ratio was 26 % (25 %).

Key figures	for the top 30 groups	(previous year)
Turnover/employee	1169 kNOK	1147 kNOK
Earnings after financial items/employee	98 kNOK	100 kNOK
Balance sheet/employee	599 kNOK	642 kNOK

The total turnover of the 30 largest companies increased by 21 % (25 % in 2007) to 10 324 MNOK (8 561) and the average number of employees increased by 14 % to 8519 (7465). The average balance per employee was 599 kNOK and the equity ratio around 29 % (33).

THE ICELANDIC MARKET

The Association of Consulting Engineers

FRV s the trade and employers' organisation for consulting engineering firms in Iceland. FRV is a negotiating body that engages in negotiations with technicians' labour unions. The current wage agreements were to expire at the end of April 2009. Because of the economic crises it has been prolonged, without any changes for the time being. FRV's member firms number 25 and their staff totals around 950 employees. FRV represents about 85% of the available resources in the sector. FRV aims to support its member firms by contributing to the improvement of its members' general business and working conditions and by improving the profile of the industry and its recognition in general. FRV attempts to increase the visibility of engineering consultants and keep attention focused on the importance of good consultancy and quality design. The condition for membership in the association is that the member companies have a certain minimum number of employees with the stipulated expertise and experience in consultancy.

FRV is working to improve the working conditions of engineering consultants by having an effect on standard agreement terms, insurance, etc., as well as disseminating information to the member companies.

Magnús Baldursson, FRV

FRV is a member of FIDIC (Fédération Internationale des Ingénieurs-Conseils) and EFCA (European Federation of Engineering Consultancy Associations).

FRV's homepage is; www.frv.is.

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FSSA is the trade and employers' organisation for Architectural firms in Iceland.

FSSA is a negotiating body that engages in negotiations with the architect's labour union. The wage agreement in effect for architecture firms was to expire at the end of February 2009. It has been prolonged without changes for the time being due to the state of the economy. FSSA's member firms number 30. The firms have decreased drastically in size because of the economic crises in Iceland. FSSA represents about 80% of the available resources in the sector.

FSSA aim is to support its member firms by contributing to the improvement of its members' general business, increase the visibility of the member firms and improve the profile of the industry and its recognition in general.

FSSA works in close relation with FRV. The Associations share office space and FRV services the Association on a daily basis.

FSSA's homepage is; www.fssa.is.

The Icelandic market slowed down dramatically in 2009

The Icelandic economy crashed in October 2008. All the major banks in Iceland collapsed. The State enacted emergency legislation authorizing the takeover of these institutions, the sale of their assets and payment of their debts. Three new banks were founded on the ruins of the former banks.

The exchange rate of the Icelandic krona collapsed vis-à-vis other currencies, in December 2008 it was more than 50% lower in respect to other currencies than it was at the beginning of the year. The value of the currency has stayed low throughout 2009, thus helping with exports but making all imports very expensive. Iceland relies heavily on import of goods and therefore inflation has stayed high. The Icelandic State has been under enormous financial load because of the collapse of the banking system. The State has received loans from the IMF and a number of countries to be able to engage in currency trading. Taxes have been raised and expenditure cuts are being made wherever possible. On the positive it seems that the value of the assets of the collapsed banks will, in the end, cover a substantial portion of the financial obligations currently resting on the State because of the banks.

There has been a substantial decrease in the operations of consulting and architectural firms in Iceland in 2009. The consulting companies have had to lay off many employees in the last 12 months. Many companies are down 30-50% in size. The Icelandic State and municipalities have greatly reduced all projects. The privet sector has also come to a halt where new projects are concerned. The forecast is that 2010 will be much the same. The exception is that there are energy-intensive industry projects and energy production projects because of them that have been on the drawing board and will be in the design phase in 2010 if all goes according to plan. Also there are plans for the design of a new hospital in Reykjavik that could be underway in the early part of 2010. The bigger engineering firms have been able to hold on to more of their staff in part because of projects they are working on in other countries and partly because of projects in industry that where underway when the crises started in Iceland. The Icelandic engineering firms have mostly been able to get contracts abroad in the field of Geothermal Energy and Hydroelectric Power. Within the companies there is expertise and experience in the fields of so-called Green Energy. If predictions run true many Icelandic engineering firms have the potential for growth in that sector in the near future.

The architectural firms have been badly hit by the financial crises in Iceland. There has been a near total stop in residential and office building projects. It is estimated that the overcapacity in the building sector will last the Icelandic population well into 2011, even longer. It is foreseen that even if the economy picks up over the next year or two, the architectural firms will still be facing problems. The state has implemented some counter-active measures like the refund of value added tax for housing renovations and repairs. Reykjavik community has also plans for projects that could benefit these companies.

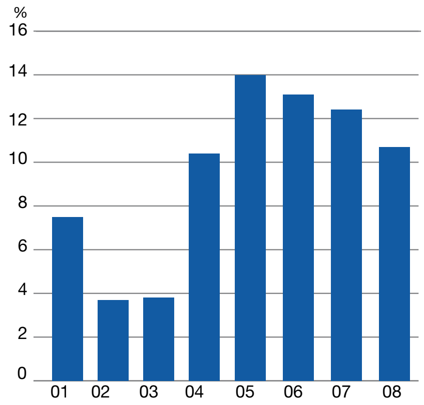
Operating performance of FRV's member companies in 2008.

According to a survey carried out by FRV, the total turnover for 2008 was MISK 15.583, an increase of nearly 10% from the year before. The average profit among member firms was 10.7% of turnover for 2008, as opposed to 12.4% in 2007. The average profit and total turnover for the past several years can be seen in the graphs below. No similar survey is made by FSSA for the architectural firms.

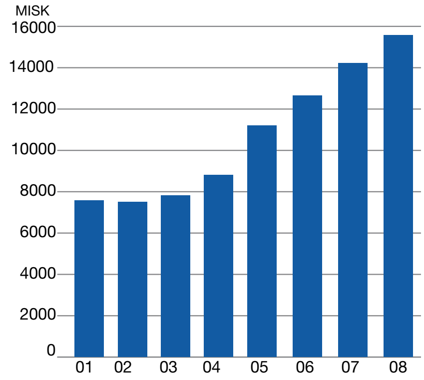
Magnus Baldursson, FRV

FRV memberfirms

Profit



Total turnover (estimated)



The top 20 Icelandic consulting engineering and architectural groups

Figures in million Icelandic Krónas. Yearmedium 2008; 100 ISK = 0,7483 EUR

	08/09	07/08	Group	Services	Turnover	(Previous year)	Average number of employees	Balance	Managing Director
FRV	1	1	Mannvit hf	MD	6500,00	4386,96	396	4100,00	Eyjólfur Árni Rafnsson
FRV	2	2	Verkís hf.	MD	4115,64	3567,56	339	2308,46	Sveinn I. Ólafsson
FRV	3	3	Efla hf.	MD	3428,83	2818,42	216	1477,20	Guðmundur Þorbjörnsson
FRV	4	5	Almenna verkfræðistofan hf.	MD	994,00	828,97	72	405,53	Helgi Valdimarsson
FRV	5	4	VSÓ Ráðgjöf ehf.	MD	840,00	850,00	70	530,00	Grímur Már Jónasson
FSSA	6	7	THG Arkitektar	A, PM	608,33	535,00	40	264,26	Halldór Guðmundsson
FRV	7	6	Hnit hf.	PM , CE, Enr	577,00	609,00	50	171,00	Harald B. Alfreðsson
FSSA	8	8	Arkís ehf.	A	500,74	499,00	45	197,00	Þorvarður Lárus Björgvinsson
FRV	9	10	VSB verkfræðistofa ehf.	CE. M, PM, E, Enr.	420,00	335,70	35	41,00	Stefán Veturliðason
FRV	10	17	Verkfræðistofa Suðurnesja ehf.	CE, Enr, PM, E	288,10	202,10	24	92,00	Brynjólfur Guðmundsson
FSSA	11	12	Batteríið ehf.	A, PM	283,00	304,00	33	6,50	Guðmundur Ósvaldsson
FSSA	12	14	ASK arkitektar ehf.	A	278,00	272,00	25	50,00	Páll Gunnlaugsson
FSSA	13	13	VA arkitektar	A	268,65	282,50	40	30,00	Richard Ó. Briem
FRV	14	9	Ferill ehf., verkfræðistofa	CE, PM	260,00	380,00	24	60,00	Ásmundur Ingvarsson
FSSA	15	11	Tark - Teiknistofan ehf.	A	251,09	308,21	25	72,73	Ivon Stefán Cilia
FSSA	16	16	Arkitektur.is	A	236,94	216,88	18	37,26	Helga Benediktsdóttir
FRV	17	15	VJI ehf.	E, Enr, I, PM	208,00	223,00	19	73,00	Magnús Kristbergsson
	18	–	Verkfræðistofa Norðurlands	MD	164,00		13	79,50	Eiríkur Jónsson
FSSA	19	18	Arkþing ehf.	A, PM	152,00	149,29	13	69,00	Hjörtur Pálsson
FSSA	20	19	Gláma Kím	A, PM	120,00	130,40	15	35,00	Árni Kjartansson

Key figures	for the top 20 groups	(previous year)
Turnover/employee	13,554 MISK	13,000 MISK
Earnings after financial items/employee	1,188 MISK	1,852 MISK
Balance sheet/employee	6,678 MISK	5,610 MISK

The total turnover for the top 20 groups was 20 500 MISK (12 300) and the total average number of employees was some 1500 (1380). The result margin before tax was about 9 % (15 %).

THE FINNISH MARKET

SKOL in brief

SKOL is a professional and employers' organization for independent and private consulting companies. SKOL has a membership of 230 consulting engineering and architect firms. The member companies employ about 14 000 people in Finland and their foreign subsidiaries employ some 8000 people abroad. Many SKOL members belong to international groupings, all together these groupings employ some 60 000 people in the world.

SKOL aims to promote professional and independent consulting engineering, to improve the preconditions of consulting and to watch the interests of the members both in Finland and abroad. The principal goal is to guarantee high quality as well as to develop efficiency, profitability and solidity. The association highlights the quality as the main criterion in the selection of the consultant.

The strategic themes in SKOL action programme for 2010 are:

- SKOL-members have skilled, educated and developing resources.
- SKOL-sector is visible, appreciated and has a good image.
- Consulting engineering markets are functional and competition is fair.
- Labour markets and conditions are flexible and encouraging.
- SKOL-member companies are competitive, progressive and profitable.

SKOL is a member of the International Federation of Consulting Engineers FIDIC. The association adheres to the principles of FIDIC and the members of SKOL are required to meet the standards of codes and practices as well as the membership qualifications of FIDIC. SKOL is also a member of the European Federation of Engineering Consultancy Associations EFCA and cooperates with consulting associations in neighbouring countries in Scandinavia and Baltic area.

SKOL member firms must act impartially in commercial, manufacturing and contracting

Timo Myllys, SKOL

interests and must have practised in independent engineering, architecture or other consulting for at least one year. The executives and leading consultants of a member firm must be full-time consultants and have an adequate education and experience in their special fields.

SKOL capacity represents two thirds of the total consulting engineering capacity in Finland. Currently, the yearly invoicing of SKOL's members amounts to about 1200 million Euro. Building construction accounts for 35 per cent, municipal engineering 25 per cent, and industrial projects 40 per cent of domestic works. About 25 per cent of turn over comes from foreign operations. Finnish consulting engineers have references in more than 100 countries in all continents.

Personnel in SKOL member companies have higheducation level. About 70 per cent of people in the member companies have a university or technical college degree. The 25 largest companies with over 100 employees have a total staff of 10 500 people, another 25 medium size companies with 30. 100 employees have 1500 people and 180 small companies with less than 30 people employ another 2000 people.

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SKOL members achieved best results since the millenium

The aggregated turnover for 2008 of SKOL members show a 15 percent increase compared to 2007. The number of personnel employed in SKOL member companies totalled 14 000 in the spring of 2008, which is eight percent higher than in the previous year. Profit margins, especially in the building sector, were the best after the millennium.

The total turnover among SKOL members in 2008 was € 1 400 million, which is an increase of approximately 15 percent compared with the previous year. Domestic turnover amounted to € 1 000 million with a 19 percent growth rate, and foreign turnover was approximately € 400 million with a 10 percent growth rate.

Domestic sales were mainly generated by building sector companies, which invoiced € 370 million, and by industrial sector engineers, which invoiced € 360 million. The civil engineering sector had a domestic turnover of € 240 million. The remaining income, € 30 million, came from education, management consulting and other areas.

Russia biggest export market in 2008, but declining

The € 400 million in foreign turnover was mainly generated by industrial sector companies, which were responsible for invoicing € 270 million, i.e. two thirds of the overall turnover. Building consultancies billed a total of € 50 million for foreign works and civil engineering consultancies € 40 million. The remainder of the foreign income – € 40 million – came from development projects in education, health, the social sector and other areas. European countries, including Russia, accounted for some 66 percent of the foreign turnover and Asian countries for some 17 percent. In 2008, projects financed by Finnida accounted for only € 18 million compared with € 27 million the previous year. The four most important export countries were Russia, USA, Sweden and Poland.

15 percent downturn in growth during 2009

During 2008 there was a rapid decline in incoming orders, which resulted in a downswing in growth and overcapacity. According to SKOL forecast, the number of people employed and the total turnover will decrease in 2009 by 15 per cent. The order situation among consulting engineers began to drop from a record level in the summer of 2008. In October 2009, the order volume, as an average for all sectors, was equivalent to only four months' work. The order situation for the infrastructure sector has remained almost normal over the past six months. The building sector appears to be making a slow recovery, with domestic building works undergoing a slow recovery from a very low starting point. Export industries are in serious recession, with orders in hand for only three months and forecasts still declining.

Even though consultancies in the infrastructure sector had the highest number of orders in hand, a third of the companies expect markets to decline next year. In the building construction sector, many projects have been discontinued and some restarted. But the future is still uncertain – the only projects on the increase are renovation works and investments in energy efficiency improvement.

Turnover is expected to decrease by some 15 per cent this year to € 1 200 million and remain on average the same in 2010. The building sector may experience a minor growth in turnover and the industrial sector a minor decrease.

Finland – a 7 % decrease in GDP for 2009

Although we are beginning to see a recovery in the global economy at the end of 2009, Finnish exports and industrial output remain stagnant. There is little doubt that a turnaround will occur, but the details concerning how and when are unclear.

Employment has weakened as rapidly as in the early 1990s. In the autumn of 2009 the seasonally adjusted unemployment rate was just under 9 percent and still growing. Since economic recoveries do not have an immediate effect on employment, the unemployment rate will continue to weaken during the initial phases of growth.

This year, Finland has suffered along with other countries from global problems. The forest industry has excess capacity all over the world, and the lack of investment needs is weakening the export outlook for the technology industries. Most of the forecasts indicate a decline in GDP of 7 percent for 2009 and zero growth for next year. Although the market situation is in fact expected to stabilise gradually, there are no expectations of a rapid recovery and return to growth.

Outlooks vary somewhat between sectors. In the forest and chemical industries, and in information and communication services, the weak market situation is expected to improve somewhat. The technology industry is predicting a weak economy far into next year. In construction, the worst part of the recession seems to be over, although due to seasonal factors the coming winter will remain bleak.

Fixed investments on the decline

Fixed investments by Finnish industry within Finland dropped by around five percent last year, and are expected to continue declining this year. In 2009, fixed investments are expected to continue diminishing by approximately four per cent to € 4.4 billion. The primary reason for investing this year is to replace old production capacity.

The energy sector continues to invest heavily. If energy sector investments are included in the figures for industry, the value of investments will actually increase by around 2 percent due to ongoing nuclear power plant construction.

The internationalisation of Finnish industry has continued. Investments made abroad in 2008 were close to the previous year's level at over €2.3 billion. Approximately two-thirds of these investments are made in the EU and North America, although the developing markets account for an increasing share. The number of personnel employed abroad has increased significantly.

Downturn in construction volume in summer 2008

The cyclical peak in building construction volume was passed in summer 2008. For the number of new buildings started, the peak came six months earlier. The volume of building construction in 2008 remained unchanged from the previous year.

Market-financed housing construction starts by major contractors came to a complete halt by the autumn as the slowdown in the property market swelled the stocks of unsold new houses. The number of commenced residential units in 2008 dropped to just over 24 000 from 30 000 the previous year. An estimated 18 000 new housing starts will be made in 2009. The number of new business and office building starts plummeted by 30% from the previous year as foreign investors in particular withdrew their interests, and generally it became harder to finance new projects. Furthermore, the vacancy rate for commercial and business premises began to rise. Industrial construction also began to fall. New public service building starts was the only category recording a minor increase. Civil engineering activity increased by one or two percent in 2008.

Twenty-five percent reduction in new housing 2009

During 2009, the volume of new housing construction will drop by more than a quarter, but renovation work will increase to a certain extent due to the growth in the domestic help credit from the beginning of the year and to the incentive measures announced by the Government.

New industrial construction starts have plummeted, especially in export companies, and activity is largely confined to major ongoing long-term projects. For instance, construction of the new nuclear power station in Olkiluoto is more than two years behind schedule and work will continue through to the summer of 2012.

Civil engineering activity in 2009 will decrease to some extent due to the completion of several major projects. On the other hand, the stimulus funds earmarked for the repair and maintenance of infrastructure will have positive effects on employment levels among contractors and building workers that will continue to be felt during 2009.

In 2010, the volume of construction work on business premises will continue to decrease significantly. By contrast, the number of new residential starts is no longer expected to fall. Renovation will account for a growing proportion of housing construction. The volume of civil engineering work is expected increase somewhat in 2010 with the commencement of a number of new major projects and with the continuation of repair and maintenance work prompted by incentive funding. In general, building construction will continue to decline to some extent.

Timo Myllys, SKOL

ATL in brief

Vesa Juola, ATL

The Association of Finnish Architects' Offices (ATL) is an independent organisation monitoring and promoting the interest of the architectural industry. Its mission is to develop architectural services and thus improve the quality of construction and the environment. The professional membership requirements of the association are strict. An ATL member office is professional. To be accepted as a member, the management of the office must have the highest professional architectural training and solid experience of working in the industry. The management is required to work full-time in planning, design or related consultation.

An ATL member office is experienced. Prior to applying for membership, the office is expected to have provided independent designing and consultation services for a minimum of three years. To further guarantee professional competence, the chief designers of the company must have a minimum of seven years' experience in the field.

An ATL member office is committed. The office leaders are required to own a majority of the company and act as the responsible management.

Construction has become an increasingly complicated industry, having to meet increasingly demanding challenges. Because of the long supply chains, it takes intense effort to secure the quality of the end result. This is why competent leadership is vital for construction and building design. The member companies of the Association of Finnish Architect's Offices have demonstrated through their training, experience and professional ethics that they have the asnecessary competence and resources to meet these new challenges.

Construction and building design deserve skilled and professional management.

The medium size of ATL memberoffice is 7,5 employees. Quite normal is that offices have more than one partner. The average amount of partners per office is 1,6 person. In 100 offices there are more than one partner.

ATL in numbers:

240	amount of members
1800	amount of people employed by members
145,2 milj €	total invoicing in the year 2008

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Architectural design in Finland: the market situation for 2009

Competition for public projects is tightening and becoming more fierce, uncertainty around information modelling continues and the battle over copyrights continues.

The market is becoming more international in terms of both exports and imports

Up until now, the market for Finnish architects has only interested international companies to the extent that Finland serves as a transit country to the east and the Baltic countries. Size and versatility appear to matter on the international market, and genuinely international design emporia have begun to emerge in Finland, too. Company acquisitions have produced a few interesting mergers among architects' offices and engineering offices in which the larger players in the Finnish field have joined forces. Foreign buyers are still rare. The primary aim of amalgamating is to strengthen the companies' position in export markets, especially in Russia and in Eastern Europe.

According to the Development Strategy for the Creative Economy published by the Ministry of Employment and the Economy in 2007, which looks forward to 2015, the significance of creative industries to the national economy will continue to grow. It appears that price competition and the distribution of resources on the international market will leave Finns with only services, construction and nursing one another into old age. The survival of architects' offices will depend on creativity. As is the case with companies in other creative fields, the revenue logic of most architects' offices is chiefly based on commercialising intangible assets. Another common feature is the small size of companies and poor networking. It is no exaggeration to suggest that copyrights, patents, brands and general maintenance of commercial procedures is an advantage to both the private architects' office and to the nation at large.

Architectural competitions

Architectural competitions are a fixed part of Finland's architectural business. For over a hundred years now, they have guaranteed young and gifted architects an opportunity to enter the market. A few new offices are established every year on the basis of competition wins. The competitions are not only held by the public sector; several private interests also have buildings designed this way. In 2008, around twice as may public competitions were held as in the year before. The subjects ranged from a modest new countryside home through to the Finnish pavilion at the Shanghai World Expo. Around half of all ATL member offices originally emerged from competitions.

The general situation for construction According to Statistics Finland, new construction in the period January–June 2009 was down by almost half on the same period last year: 42%. Measured in cubic metres, new construction of commercial and office premises, as well as industrial and storage buildings, was less than half the previous year's figure. The figures in cubic metres for all other construction types also decreased. During January–June, construction began on 9,300 new flats and houses, which is almost a third less than the same period the year before.

As is typical in times like these, the backlog of postponed projects has lengthened. The projects have been granted building permits but work has not yet begun, a phenomenon especially visible in major firms' housing production. What is already apparent is that once demand picks up again, projects will resume according to tight schedules and we will again run the risk of an overheated market situation.

Industrial, commercial and office construction almost stalled

Although industrial, commercial and office construction has almost ground to a halt, commissions for design work have proven more solid than feared. Over the course of the current year, around 30% fewer projects have begun than did last year. Design commissions for office buildings have been hit hardest in the general slowdown in new construction. Demand has tailed off almost completely, with no new construction of office premises beginning in early 2009.

Surprising strength in commissions for residential projects

The proportion of commissions for architects' offices made up by residential projects reached a record high of 25% in 2008, having previously hovered between 10% and 15%, and not climbed any higher than 18%. Although residential construction almost stalled during spring 2008, falling by 20% from the previous year's level of just over 30,000 to a mere 24,000 dwellings, the fall was moderated by strong government stimulus measures. These ensured that construction firms' own output became subsidised by the state, which in turn increased openings for architects' offices. With state support, construction of new blocks of rental flats began on a significantly greater scale this year than in previous years.

Public projects are scheduled to commence over the following six-month period in volumes similar to the end of last year, though the ease with which the projects are suspended or postponed makes accurate projection difficult.

Growing significance of renovation construction

The proportion of renovation construction in total design commissions has increased. According to the most recent trade survey, its proportion in order backlogs is at around 30%, though as a proportion of new orders it has already climbed to 50%. The amount has already reached double the average for the preceding 15 years.

The significance of renovation construction is growing in other ways, too. This is clearly laid out in the government's renovation construction strategy for 2007–2017. The strategy notes that the quality, functionality and level of service provided by the building stock has an immediate impact on individuals' every-day well-being and on national competitiveness, and that, over the long term, the functionality of the building stock is a key factor in achieving sustainable development. Renovation construction is thus viewed as imperative and immediately effective. Now that the rate of new construction is falling, an excellent opportunity has opened up to architects to train as designers for renovation construction. A further factor securing the future of architects is that, as the aforementioned renovation construction strategy predicts, the renovation needs of residential tower blocks will grow by almost 30% over the period 2016-2025. Moreover, the strategy notes that renovation needs are property-specific and always require individualised and competent design.

Self-destructive pricing

Price competition among architects' offices began during the late winter, early spring of 2008, and the result is a foregone conclusion – everyone loses. It would seem that more than two consecutive depressions are needed before everyone learns that slashing the price of design work does not increase the number of commissions. The damage done to design and pricing by the last recession was yet to be fully repaired when the current panic set in.

The cost of design has not fallen

Architects' offices' expenses have risen by more than 10% over the last two years. Considering that salaries and wages make up around 72% of expenses, it is impossible to justify the current discounts other than by simply designing less. But this suggestion is contradicted by the constant growth in the amount of basic design work, two examples of which are the increasingly detailed CAD and modelling instructions from different clients, and a host of new official requirements. Different project management approaches further add to the designer's role.

Future challenges and R&D

The building and construction sector faces a challenging future, since homes and workplaces are always tied up with plenty of expectations and hopes. One attempt to meet these hopes is the government-funded TEKES programme, the aim of which is to develop the sector's operational models and improve the productivity of companies in the sector, especially in renovation, welfare and infrastructure construction. A total of EUR 80 million has been allocated across six years for research and development.

CO2

According to studies, the most significant pressures for change in the built environment were felt to be, in this order, energy saving, ageing of the population, changes in values, needs, lifestyles and quality of life, and adaptation to climate change. Surprising that in the midst of this faith in technology, something more than simply technical issues with technical solutions emerged. Values, needs and lifestyles are changing. It should be possible to enjoy one's environment, and homes should function. Purely technological solutions are secondary to these. The challenge of creating innovations in the built environment falls into the lap of architects, which is why town planners and architect designers should take it seriously. The current international pause for breath offers an opportunity to innovate solutions in construction which have never before been seen.

Labour market

For the first time ever, Finnish architects' offices have signed a collective agreement. In a 11 November 2009 meeting, the board of the Association of Finnish Architects' Offices (ATL) accepted the results of negotiations over a collective agreement between ATL and the Federation of Professional and Managerial Staff (YTN).

The collective agreement standardises architects' offices' employment practices and eliminates uncertainty around interpretation. The parties to the agreement, ATL and YTN, are applying for general validity. General validity means that all architects' offices are obliged to observe the conditions of the collective agreement in their employment agreements. This way, general validity eliminates competition over unhealthy working conditions in the industry.

Vesa Juola

The top 100 Finnish consulting engineering and architectural groups

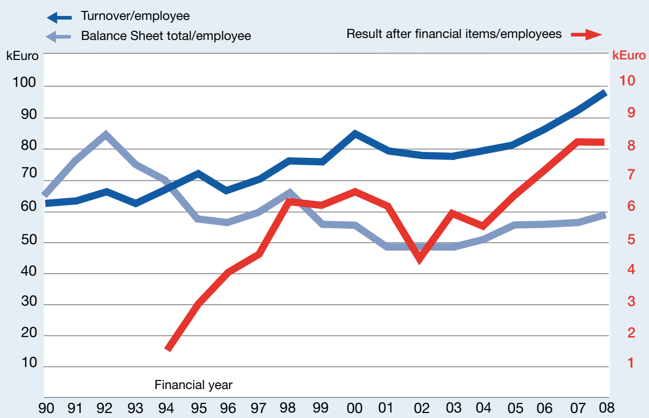
	08/09	07/08	Group	Services	Annual Report	Turn over MEUR	(Previous year)	Average number of employees	Tot. Balance sheet MEUR	CEO/Managing director (December 2009
SKOL	1	1	Pöyry Group	MD	08	828,3	718,2	7702	580,3	Heikki Malinen
SKOL	2	2	Etteplan Oy	I	08	161,6	125,2	2188	78,9	Matti Hyytiäinen
SKOL	3	13	Neste Jacobs group (f d Rintekno)	I	08	108,5	20,4	519	36,6	Tom Främling (fr juni 2009)
SKOL	4	5	FMC Group (Finnmap Consulting Group)	CE,S,E,M	08/09	85,4	66,3	1060	70,6	Tage Eriksson
	5	4	FCG Finnish Consulting Group	MD	08	79,4	73,2	859		Paul Paukku (jan 2009)
SKOL	6	6	Ramböll Finland	MD	08	76,6	61,2	956	34,0	Markku Moilanen (fr Jan 2008)
SKOL	7	3	SWECO Industry Oy	I,MD	08	69,6	93,4	806	34,6	Kari Harsunen
SKOL	8		Destia Group		08	44,6	35,4	454		
SKOL	9	7	Elomatic Group Oy	I, MD	08	41,5	44,0	605	27,5	Olli Manner
SKOL	10	8	Citec Group (proforma)	I, Env	08	32,8	38,9	510	17,4	Rune Westergård (SO)
SKOL	11	11	Ingenjörsbyrå Olof Granlund koncernen	E,M	08	27,8	25,8	340,0		Reijo Hänninen
SKOL	12	20	Vahanen Oy	CE	08	26,3	11,5	200		Risto Vahanen
SKOL	13	14	WSP Group Finland (proforma/ LT-Konsultit, Kortes, Environmental)	MD	08	25,8	17,6	296		Matti Mannonen
SKOL	14	16	A-Insinöörit Group	S,CE, PM	08	24,9	14,7	273	8,8	Petri Laurikka
SKOL	15	13	SITO Group Oy	CE, Env, PM	08	24,3	22,4	277	13,2	Kimmo Fischer
	16	9	ÅF Group	I, Enr	08	23,9	34,4	243		Eero Auranne
	17	19	Insinööritoimisto Comatec Group	I, PM	08	23,4	11,6	282	14,2	Aulis Asikainen
SKOL	18	10	Deltamarin Oy	I	08	21,8	26,9	251	8,8	Mika Laurilehto
SKOL	19	15	Polartest Oy	Enr	08	20,4	15,9	174		Matti Andersson
SKOL	20	17	Rejlers Finland Oy	I, E, M, Env	08	19,5	12,4	262	9,4	Lauri Valkonen / Seppo Sorri
ATL	21	81	Arkkitehtitoimisto Lahdelma & Mahlamäki Oy	A	08	19,5	1,4	20	0,7	Ilmari Lahdelma, Rainer Mahlamäki
	22		ISS Group	MD	08	18,6	–	208	9,1	P. Myllyniemi & V. Tiilikka
SKOL	23	23	CTS Engineering Oy	I,CE	08	13,8	9,2	156	4,9	Antti Lukka
SKOL	24	18	Suomen Talokeskus Oy	MD	08	11,5	12,0	94	10,1	Jani Saarinen (june 2009)
SKOL	25	27	Protacon koncernen Oy	I, E, PM	08	10,5	6,9	97	6,5	Timo Akselin
SKOL	26	29	Ahma Insinöörit Oy	PM	08	10,5	6,1	103	2,3	Ari Näätänen
	27	21	SWECO Finland Oy	PM	08	10,2	10,1	85		Jyrki Keinänen
	28	24	Raksystems Oy	PM, CE, S	08	10,2	7,6	80	3,2	Marko Malmivaara
SKOL	29		Optiplan Oy	MD	08	9,8	8,2	140	2,9	Tommi Vaisalo
SKOL	30	22	Chematur Ecoplanning Oy	* I	08	9,0	9,8	11	9,3	Pentti Kivikoski
SKOL	31	25	Oy Omnitele AB	PM(tele)	08	7,5	7,5	55	4,0	Timo Mustonen
SKOL	32	26	Indufor Oy	I	08	7,0	6,9	21	3,7	Tapani Oksanen
SKOL	33	50	NIRAS Finland Oy (NIRAS Group A/S)	Env	08	6,8	2,6	38	3,1	Tor Lundström
SKOL	34	28	AX-Konsultit Oy	Env,Enr,I,E,M	08	6,5	6,2	85		Urpo Koivula
SKOL	35	32	Projectus Team Oy	E,M	08	6,4	5,7	89		Juha Pihlajamäki
SKOL	36		Golder Associates Oy		08	6,4		69		Yrjö Lintu
ATL	37	34	Arkkitehtitoimisto Pekka Helin & Co Oy	A	08/09	6,2	4,8	56	2,8	Pekka Helin
	38	30	Insinööritoimisto Enmac Oy	I	08	6,1	5,9	88	2,6	Martti Ala-Vainio
ATL	39	33	Arkkitehtitoimisto Larkas & Laine Oy	A	08	5,5	5,5	62	2,1	Harri Laine
ATL	40	37	Innovarch Architects Oy	A	08	5,2	4,3	50	3,7	Pertti Hakamäki
SKOL	41	35	Magnus Malmberg Oy	CE, S	08	5,0	4,8	61		Tapio Aho
SKOL	42	36	Saanio & Riekkola Oy	CE, Env	07/08	4,4	4,5	35		Reijo Riekkola
SKOL	43	40	TSS Group Oy	E	08	4,0	3,5	50	1,5	Kari Kallio
SKOL	44	38	Ingenjörsbyrå Oy Avecon	PM, M, CE	08	3,8	3,9	71	1,4	Peter Jakobsson
SKOL	45	39	Rapal Oy	PM	08	3,7	3,9	40	3,1	Tuomas Kaarlehto
SKOL	46	43	Insinööritoimisto Lausamo Oy	E	08	3,6	3,4	50	2,3	Timo Tenninen
SKOL	47	54	Kalliosuunnittelu Oy (Rockplan Ltd)	CE	08	3,5	2,5		1,8	Jarmo Roinisto
	48	58	Rakennuttajatoimisto HTJ Oy	PM	08	3,5	2,4	25	1,2	Martti Reijonen
SKOL	49	42	Insinööritoimisto Ylimäki & Tinkanen OY	CE	08	3,5	3,5	45	2,4	Rauli Ylimäki
SKOL/ATL	50	52	KS OY Arkkitehtuuria	A	08	3,4	3,2	34	2,3	Timo Meuronen
ATL	51	48	Arkkitehtitoimisto SARC Oy	A	07/08	3,3	2,7	45	4,8	Sebastian Savander
SKOL	52	62	Asitek Oy	E	08	3,2	2,2	10	1,3	Rauno Mäkelä
SKOL	53	55	RAMSE Consulting Oy	PM	08	3,1	2,4	29	1,0	Mikko Paalasmaa
SKOL	54	44	Hepacon Oy	M,E	08	3,1	2,9	35	1,7	Matti Remes
SKOL	55		Tuomi Yhtiöt Oy		08	3,0	2,7	38	1,2	Jarmo Piirainen
SKOL	56	46	Insinööritoimisto Kontermo Oy	E,M	08	3,0	2,8	40	1,6	Jukka Hyttinen
ATL	57	51	Arkkitehtitoimisto Laatio Oy	A	08	2,9	2,6	30		Marja Laatio
SKOL	58	49	Geopalvelu Oy	CE	08	2,9	2,6	45	1,3	Toivo Ali-Runkka
SKOL	59		Geounion Oy	CE	08	2,9	2,1	35	0,8	Matti Mäntysalo
ATL	60		Schauman Arkkitehdit Oy	A	08	2,9	1,8	25	2,1	Frank Schauman
SKOL	61	60	Geotek Oy	Env	08	2,8	2,3	21	1,0	Reino Mäkinen
SKOL	62	47	YSP-Consulting Engineers Oy	E,I	08	2,8	2,8	23	1,5	Juha Pykälinen
	63	45	Indepro Oy	PM, CE	08	2,8	2,8	23	1,5	Seppo Kivilaakso
SKOL	64	56	Insinööritoimisto Pontek Oy	CE	07/08	2,8	2,4	28	1,7	Keijo Saloviin
SKOL	65	67	EP-Logistics Oy	CE, PM, A	08	2,7	2,1	24	1,1	Pekka Korpiharju
ATL	66	53	Arkkitehtitoimisto Sigge Oy	A	08	2,6	2,5	33	2,1	Pekka Mäki

SKOL = Member of SKOL, the Finnish Association of Consulting Frms (*) = lack of conforming figure/proforma/assumed – = missing figure PM = Project Management, A = Architecture, CE = Civil/Structural Engineering, Env = Environment, Enr = Energy, E = Electrical,M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

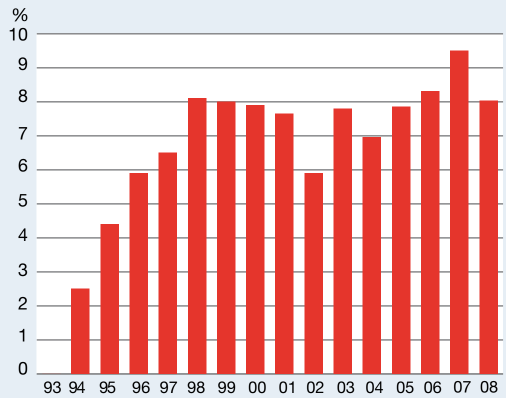
The top 100 Finnish, cont

	08/09	07/08	Group	Services	Annual Report	Turn over MEUR	(Previous year)	Average number of employees	Tot. Balance sheet MEUR	CEO/Managing director (December 2009)
SKOL	67	59	Insinööritoimisto Grundteknik AB (Pohjatekniikka Oy)	CE	08	2,6	2,3	32	1,8	Christer Sundman
ATL	68	57	Arkkitehdit Tommila Oy	A	08	2,5	2,4	25	3,8	Mauri Tommila
SKOL	69	64	Maaskola Oy	M	08	2,4	2,1	22	0,9	Jukka Sainio
ATL	70	77	Arkkitehtitoimisto Hannu Jaakkola Oy	A	08	2,3	1,6	18	1,5	Hannu Jaakkola
SKOL	71	82	Entop Oy	I	08	2,3	1,4	29,0		Kimmo Määttänen
SKOL/ATL	72	66	Sweco Paatela Architects Oy	A	08	2,3	2,1	15	2,2	Mikael Paatela
ATL	73	71	Arkkitehtitoimisto LPR, Laiho-Pulkkinen-Raunio Oy	A	08	2,2	2,0	26	2,1	Mikko Pulkkinen
ATL	74		Sisustusarkkitehdit Gullstén & Inkinen Oy	A	08	2,2	2,7	22	2,9	Jari Inkinen
ATL	75		Arkkitehtitoimisto Tuomo Siitonen Oy	A	08	2,2	2,1	22		Tuomo Siitonen
SKOL	76	68	KVA Architects Ltd	A, PM	08	2,2	2,0	20	0,6	Jean Andersson
ATL	77		Uki Arkkitehdit Oy	A	08	2,2	2,0	32	1,1	Mikko Heikkinen
ATL	78	65	Arkkitehditoimisto Helamaa & Heiskanen OY	A	08	2,2	2,1	25	3,1	Keijo Heiskanen
ATL	79	70	Gullichsen Vormala Architects Oy	A	07	2,0	2,0	20		Timo Vormala, Kristian Gullichsen
SKOL	80	73	Yhtyneet Insinöörit Oy	Enr,E	08	2,0	1,9	24	0,7	Keijo Mäkinen
SKOL	81	88	Oy Juva Engineering Ltd	S,CE	08	2,0	1,3	22	1,1	Heikki Järvinen
SKOL	82	76	Arkins Suunnittelu Oy	M	08	2,0	1,6	22		
ATL	83		Pes-Arkkitehdit Oy (Pekka Salminen)	A	08	1,9	1,6	25	1,3	Jarkko Salminen
ATL	84		Arkkitehtitoimisto Petri Rouhiainen Oy	A	08	1,9	1,3	15	1,6	Petri Rouhiainen
SKOL	85	61	Plaana Oy	Env	08	1,9	2,3	26	0,9	Aini Sarkkinen
SKOL	86		PR-Logisticar		08	1,9		10		Hans Schröder
	87		Arkkitehdit Nrt Oy (Nurmela, Raimoranta, Tasa)	A	08	1,9	1,5	26	0,7	Temu Tuomi
SKOL	88	80	Insinööritoimisto Lauri Mehto Oy	CE	08	1,8	1,5	19	0,7	Simo-Pekka Valtonen
SKOL	89	79	Insinööritoimisto Tauno Nissinen Oy	E,Enr	08	1,8	1,5	24	0,5	Antti Danska
SKOL	90	83	Strafica Oy	CE	08	1,8	1,4	14	0,9	Hannu Pesonen
SKOL	91	74	Focusplan Oy	I	08	1,8	1,7	24	0,8	Vesa Ranta
SKOL/ATL	92	78	Arkkitehtitoimisto CJN Oy	A	08	1,8	1,6		0,9	Kari Somma
SKOL/ATL	93	72	Parviainen Arkkitehdit Oy	A	08	1,8	1,9	23	0,9	Juha Posti
ATL	94		Arkkitehtitoimisto Jukka Turtiainen	A	08	1,7	1,4	16	2,1	Jukka Turtiainen
ATL	95		Arkkitehtuuritoimisto B & M Oy	A	08	1,7	1,1	20	0,7	Jussi Murole
SKOL	96		Insinööritoimisto Srt Oy		08	1,7		20		Pauli Oksanen
SKOL	97	91	Insinööritoimisto Controlteam Oy	PM, CE, S	08	1,6	1,3	18	0,4	Petri Seppänen
SKOL	98		Insinööritoimisto Akukon Oy		08	1,6	1,5	18		Uli Jetzinger
ATL	99		Eriksson Arkkitehdit Oy	A	08	1,5	0,2	19	0,6	Patrick Eriksson
SKOL	100		Lvi-Insinööritoimisto Vahvacon Oy		08	1,5	1,2	14	0,6	Ilkka Råman

The top 30 Finnish groups



Result margins



As in Sweden, and other countries, it´s delicate to compare the performance of the large groups with that the midsized and smaller companies. In the last-mentioned categories the often several partner´s hard work have a comparatively more favourable effect on the companies´ turnover and profitability.

For the groups 31-100 in the chart above the total turnover in 2008 amounted to some 216 MEUR (167 in 2007) with around 2215 employees (2100 in 2007). The turnover/employee increased from 80 000 EUR in 2007 to 97 700 EUR in 2008.

Key figures	for the top 30 groups (excl. Pöyry)	(previous year) (excl. Pöyry)
Turnover/employee	98200 EUR (91900 EUR)	90900 EUR (86670 EUR)
Earnings after financial items/employee	8200 EUR (6800 EUR)	8200 EUR (7200 EUR)
Balance sheet/employee	59200 EUR (45300 EUR)	56900 EUR (55300 EUR)

The total turnover for the top 30 groups increased in 2008/09 with as much as 24 % to around 1 890 MEUR (1 520 MEUR) and the number of employees increased with 15 % to 19250 (16750). If Pöyry Group, which have a dominant influence on the statistics, is excluded the turnover is increased with 32 % to some 1 062MEUR (805 MEUR) and the number of employees increased with 17 % to 11550 (9890).

The international market

International development

During 2008, the 300 largest engineering consultancies and architectural firms in Europe reported record-high results. The profit margin (profit/loss after financial items) for the 300 companies was 7.7% with a median level of 6.8 %. The profit margin in 2007 was 6.8 %. With the arrival of the financial crisis and the subsequent recession, profitability within the sector will of course be affected, and lower profit margins can be expected. Throughout Europe, there are numerous large infrastructure projects in progress that are benefiting many of the players in the sector, and helping to cushion the negative effects of the recession. Accounts of these and other projects, as well as the continued consolidation within the sector, are given below.

European corporate events

From January 2009, all Altrans subsidiaries in Germany – Askon Consulting Group, Berata, Eurospace and Altran CIS – will operate under the name of Altrans, which will thereby be stronger and more distinct in Germany. The group is now represented with 13 000 employees in 16 offices all over the country.

Altran is contributing towards more structured and safer civil aviation in Brazil. Together with Arthur D. Little Germany, they are working on a proposal for an Open Sky Agreement based on analyses of similar agreements in other regions. The project will be historic for Brazilian civil aviation. In South Africa too, projects are being conducted in the field of aviation safety, where in the case of Durban Airport safety systems are being developed in preparation for the World Football Championships in 2010.

WS Atkins has been appointed official supplier of engineering services for the London Organisation Committee for the 2012 Olympic Games. In Dorset, the Portland Marina – England's largest and most sustainability-oriented marina – has now been completed. The marina has been planned and designed by Atkins, and will host the sailing events during the 2012 Olympics.

A new signal system will be supplied by Atkins for the London commuter train system in 2011, a contract that is worth over GBP 40 million.

In Denmark, Atkins is co-operating with Ramböll, and with the support of Parsons and Emch+Berger, on the upgrading of Danish railway signal systems to ERTMS (European Rail Traffic Management System) standard. The project is the largest of its kind in Europe; never before has a country's entire rail system been upgraded on this scale. The entire project is valued at GBP 2.9 billion, and is expected to be followed by similar investments in Sweden and Germany.

Atkins has had its agreement with United Utilities extended by 5 years from 2010. Most of the projects will concern improvements in water and sewage treatment facilities, and will be carried out in joint venture with Galliford Try and Costain. The contract is worth approximately GBP 400 million.

Together with Arup, Atkins has been awarded a major tunnel project on behalf of Crossrail Ltd. The Crossrail project is a new rail connection in London and its south-eastern suburbs. It comprises the planning and design of two 23 km-long twin tunnels between Paddington and south-east London, and will employ the services of 150 engineers for 18 months. Obermeyer Planen + Beraten GmbH has purchased part of Arcadis' German operations and taken over 50 consultants in a deal worth EUR 4.5 million. At the same time, the companies have signed a business co-operation agreement.

Arcadis is concluding its merger with New York-based Malcolm Pirnie and in this way advancing its positions in the international water market. Malcolm Pirnie, with1 700 employees and a turnover of USD 392 million during 2008, will be a wholly-owned subsidiary of the Arcadis Group.

Fugro acquisitions

Fugro has signed an agreement with the Australian company Tenix Pty Ltd on the purchase of Tenix LADS, a global supplier of airborne hydrographic services with some 60 employees in Australia and the USA, and a turnover of approximately EUR 12.5 million.

January saw the acquisition of the Florida-based LoadTest Group, with subsidiaries in Singapore, South Korea and Great Britain, for approximately EUR 13.5 million. Thje LoadTest Group, a leading company in the field of bearing capacity calculation, has some 40 employees and a turnover of approximately EUR 13 million.

In Germany, Fugro has purchased VIB Weinhold, a leading supplier of pipeline planning, investigation and inspection services, with 26 employees and a turnover of EUR 3 million. The company will in the future be called Fugro Weinhold Engineering GmbH.

In Norway, Fugro has acquired Interaction A/S, which specialises in maritime electromagnetic data processing. The company, with 8 employees, will be incorporated in Fugro's General Geophysical Services.

The World's top 10

		Group	Country	Annual Report	Average number of employees	(Last year)	Turnover M USD
1	2	URS Corporation	USA	08	50000		10086,3
2	1	AECOM 30 sept 06	USA	08/09	32000	36000	6119,5
3	3	Altran Technologies	France	08	18522	17130	2415,6
4	6	SNC-Lavalin Group	Canada	08/09	18200	16000	6659,2
5	5	CH2M Hill Companies, Inc.	USA	08	18000	16000	5589,9
6	4	WS Atkins plc	England	08/09	17849	16981	2732,0
7	10	Fugro N.V	Netherlands	08	13627	10824	3170,7
8	8	Arcadis Group	Netherlands	08	13171	11304	1695,9
9	9	Mott MacDonald Group	England	08	12664	11029	1677,9
10		Alten Group	France	08	12470	9590	1235,2

STD has this year not had the recources to in detail follow the global Consultancies. We are therefore not able to publish the charts over the World´s top 200 groups as before. But we still wish to present the top 10 – mererly to give our readers a global perspective on the major European groups.

The top 50 European architectural groups

08/09	07/08	Group	Country	Annual Report	Average number of employees	(Last year)	Turnover M EUR
1	1	AEDAS Architects Group	England	*07	1900	1900	258,10
2	3	RMJM Hillier Group	England	07/08	1125	696	125,75
3	2	Foster & Partners Ltd	England	08/09	1036	1018	191,37
4	4	Archial Group (SMC Group) plc	England	08	631	631	53,47
5	6	Broadway Malyan Ltd	England	07/08	605	470	65,76
6	5	Chapman Taylor LLP	England	08	510	510	62,95
7	7	White arkitekter AB	Sweden	08	466	445	51,62
8	14	Benoy Architects Ltd	England	08	441	333	45,15
9	24	ATP Architects and Engineers Group	Austria	08	420	398	53,77
10	8	gmp-Architekten von Gerkan, Marg und Partner	Germany	*08	400	380	56,00
11	11	PRP Architects Ltd	England	08/09	383	352	47,39
12	10	SWECO Architects AB	Sweden	08	368	367	51,45
13	9	3DReid Architects Ltd	England	*07/08	367	370	22,96
14	13	Barton Willmore Group	England	07/08	343	283	41,55
15	18	Arkitektfirmaet C.F. Møller	Denmark	08	313	294	34,91
16	17	INBO Architects/Consultants	Netherlands	08	308	318	30,21
17		Stride Treglown Group Ltd	England	08	295	292	21,62
18	21	Nightingale Associates	England	08	292	267	29,03
19	22	Keppie Design	Scotland	07/08	273	261	18,31
20	28	Murray O´Laoire Architects Ltd	Ireland	08	270	225	20,87
21	20	Burckhardt+Partner AG Architekten Generalplaner	Switzerland	08	263	268	52,11
22	12	Sheppard Robson	England	07	250	350	
23	23	HKR Architects	Ireland	*07/08	250	250	23,00
24	31	Arkitektbüro HPP Hentrich-Petschnigg & Partner GmbH	Germany	*08	250	212	27,00
25	33	LINK Signatur Gruppen	Norway	08	250	201	22,76
26	25	Arkitema K/S	Denmark	08	250	242	27,67
27	36	Scott Brownrigg Architects	England	07/08	232	190	27,27
28	26	O.M.A. Office for Metropolitan Architecture	Netherlands	08	228	300	41,50
29	29	Aukett Fitzroy Robinson plc	England	07/08	228	215	28,45
30	19	RKW Architekten & Co, KG	Germany	*08	220	270	30,00
31	30	Allies and Morrison Architects Ltd	England	*07/08	220	215	28,33
32	34	Herzog & de Meuron Architekten AG	Switzerland	*08	200	200	14,62
33	44	Llewelyn-Davies -Yeang Ltd	England	07/08	200	165	
34	42	Rogers Stirk Harbour & Partners (fd Rickard Rogers)	England	07/08	199	168	47,96
35	41	HENN Architekten GmbH	Germany	*08	190	170	18,00
36		Tengbom	Sweden	08	182	141	18,13
37		Purcell Miller Tritton	England	07/08	179	142	12,60
38	40	DEGW Group	England	07	174	174	21,45
39		HLM Architects	England	07/08	170	165	
40	47	JSK Architekten GmbH	Germany	*08	170	158	15,40
41	37	Lewis & Hickey Architects	England	08/09	165	182	11,83
42	43	Heinle, Wischer und Partner	Germany	*08	160	167	17,60
43		Temagruppen Sverige AB	Sweden	08	157	148	17,23
44	48	Årstiderne Arkitekter A/S	Denmark	*07/08	155	155	14,76
45	50	Lyons+Sleeman+Hoare Architects	England	*08	150	150	9,44
46		Austin Smith Lord Architects Ltd	England	07/08	150	125	11,02
47	45	Henning Larsen Architects	Denmark	07/08	150	150	20,15
48		3XNielsen A/S	Denmark	07/08	150	108	14,01
49	49	Atelier Jean Nouvel S.A	France	*08	140	150	20,00
50		EPR Architects Group Ltd	England	07/08	127	127	14,57

The chart is somewhat incomplete since we haven't succeed to get any figures from a few wellknown groups.

In England, Fugro has purchased the Milton Keynes-based company General Robotics Limited, with 12 employees. The company is engaged in underwater simulation and visualisation. GRL will become Fugro GRL and form part of Fugro Subsea Services Business.

Fugro has been commissioned to conduct infrastructure projects in Turkey, including a bridge over Izmir Bay, in Hong Kong, with sea-bottom surveys as part of the Hong Kong-Zhuhai-Macao Bridge Project, and in California for the collection of data on motorway infrastructure. The project is valued at approximately EUR 23 million.

Fugro has a strategic alliance with the Norwegian company EMGS (ELectromagnetic Geoservices ASA), a world leader in the field of electromagnetic image generation, until the end of 2011. The agreement gives Fugro access to EMGS's methods for extracting and producing hydrocarbons, at the same time as EMGS is given access to Fugro's global marketing and sales network and maritime expertise. As part of the agreement, Fugro provides EMGS with a NOK 150 million convertible loan.

SMC Group becomes Archial Group In January, SMC Group changed its name and is now called Archial Group, with 26 offices in England and other countries.

Mott MacDonald won a contract for an oil-storage terminal in the United Arab Emirates. They will be responsible for the structural planning and design management of the USD100 million project, which is situated alongside Fujairah, one of the world's largest oil tanker ports.

In March, Mott MacDonald strengthened its position within the medical care sector through the acquisition of leading clinical management consultancy Teamwork Management Services. The deal strengthens Mott MacDonald's competence in the medical care sector and increases its capacity to manage major projects.

Newly established WSP Rus in St. Petersburg has signed its first commercial agreement in Russia, with multi-consultancy partner GT Morstroy, on the provision of consulting services related to the Shtokman Onshore Project. The

The European top 300 consulting engineering and architectural groups

08/09	07/08	Group	Services	Country	Annual Report	Average number of employees	(Last year)	Turnover MEUR	CEO/President Managing Director (December 09)
1	1	Altran Technologies	I	France	08	18552	17130	1650,00	Yves de Chaisemartin
2	2	WS Atkins plc	MD	England	08	18017	16981	1860,80	Keith Clarke
3	3	Arcadis Group	MD	Netherlands	08	13977	11304	1740,00	Harrie L. J. Noy
4	5	Fugro N.V	CE	Netherlands	08	12977	10824	2154,50	Klaas S. Wester
5	4	Mott MacDonald Group	MD	England	08	12664	11029	1447,85	Keith Howells
6	7	Alten Group	I	France	08	12000	9590	846,30	Simon Azoulay
7	6	Mouchel Group	MD	England	08/09	11121	9750	932,42	Richard Cuthbert
8	9	WSP Group plc	MD	England	08/09	10596	8197	950,80	Christopher Cole
9	8	Assystem Group S.A	I	France	08	9470	8870	672,10	Dominique Louis
10	10	ARUP Group	MD	England	08/09	8929	8100	914,03	Terry Hill
11	13	Rambøll Group	MD	Denmark	08	7758	6385	756,49	Flemming Bligaard Pedersen
12	11	Pöyrö Group	MD	Finland	08	7702	6852	828,30	Heikki Malinen
13	12	Grontmij Group	MD	Netherlands	08	7327	6656	846,20	Sylvo Thijsen
14	14	Halcrow Group Ltd	MD	England	08	7309	6021	588,46	Peter G. Gammie
15	17	Groupe Egis	MD	France	08	7300	5150	505,00	Nicolas Jachiet
16	15	Segula Technologies Engineering Group	I	France	08	6500	6000	514,00	Denis Leblond
17	16	Scott Wilson Ltd plc	MD	England	08/09	6498	5526	428,06	Hugh Blackwood
18	20	Bertrandt AG	I	Germany	08	5543	4150	434,40	Dietmar Bichler
19	18	SWECO AB	MD	Sweden	08	5433	4699	574,96	Mats Wäppling
20	32	Sener Group	MD	Spain	08	5375	2650	343,43	Jorge M. Sendagorta
21	19	DHV Group	MD	Netherlands	08	5320	3986	106,47	Bertrand M. van Ee
22	30	AKKA Technologies S.A	I	France	08	5206	2795	381,55	Maurice Ricci
23	19	Hyder Consulting Group Ltd	MD	England	08/09	4643	4257	401,62	Ivor Catto
24	26	COWI Group	MD	Denmark	08	4475	3820	469,19	Lars-Peter Søbye
25	21	RPS Group plc	Env	England	08	4438	4093	592,36	Alan S. Hearne
26	24	Capita Symonds	MD	England	*08	4000	3900	357,81	Jonathan Goring
27	25	Davis Langdon & Seah International (LLP)	PM, QS	England/ Switzerland	*08/09	4000	3900	261,87	Alastair Collins; Paul Dring Morell
28	28	ÅF-Group	I,E,M,Enr	Sweden	08	3948	3263	475,73	Jonas Wiström
29	31	Semcon AB	I	Sweden	08	3631	2672	343,43	Kjell Nilsson
30	23	Royal Haskoning Group	MD	Netherlands	08	3378	3940	45,90	Jan Bout
31	27	White Young Green	MD	England	08/09	3185	3364	329,35	Paul Hamer
32	35	EC Harris LLP	MD	England	07/08	3019	2437	371,20	Philip Youell
33	33	Tebodin, Consultants & Engineers	MD	Netherlands	08	2914	2629	22,31	Pieter Koolen
34	29	AECOM Ltd (former FaberMaunsell Ltd)	MD	England	*08	2883	3000	255,86	Ken Dalton
35	45	Oranjewoud group	MD	Netherlands	08	2846	2082	363,08	Gerard Sanderink
36	38	SNC-Lavalin Europe SA	MD	France	08	2650	2300	17,25	Jean Claude Pingat / Jean-Paul Vettier
37	40	IDOM Group	MD	Spain	08	2589	2210	18,14	Luis Rodriquez Llopis; Fernando Querejeta
38	34	Rücker AG	I	Germany	08	2532	2500	16,71	Wolfgang Rücker, J. Vogt
39	51	SYSTRA Group	MD	France	08	2499	1697	17,23	Philippe Citroën
40	39	Turner & Townsend Group	PM,QS	England	08/09	2461	2412	308,46	Vincent Clancy
41	44	S II S.A	I	France	08/09	2448	2075	19,43	Bernard Huvé
42	41	PB Parsons Brinckerhoff Ltd (Europe)	MD	England	08	2411	2187	307,45	Gregory R. Ayres; Eric C. Burton
43		Tractebel Engineering A.S. (GDF Suez)	MD	Belgium	08	2400		255,00	Georges Cornet
44	42	EPTISA Grupo EP	MD	Spain	08	2216	2144	198,00	Luis Villarroya Alonso
45	48	Etteplan Oy	I	Finland	08	2188	1895	161,60	Matti Hyytiäinen
46	46	Waterman Group plc	MD	England	08/09	2114	1950	154,10	Nicholas Taylor
47	37	Mace Group Ltd	PM	England	08	1914	2325	765,03	Stephen Pycroft
48	47	AEDAS Architects Group	A	England	*07	1900	1900	258,10	James Handley, Brian Johnson, Peter Oborn
49	43	Teleca AB	I	Sweden	08	1874	1989	106,47	René Svendsen-Tune
50	36	MWH Europe	MD, Env	England	08	1854	2400	209,88	Ken Farrer
51	52	TYPSA Group	MD	Spain	08	1819	1636	163,75	Pablo Bueno Sainz
52	54	PM, Project Management Group	PM, MD	Ireland	08*	1800	1620	186,50	Pat McGrath

PM = Project Management, A = Architecture, CE = Civil-/S = Structural Engineering, Env = Environment, Enr = Energy, E = Electrical, M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

08/09	07/08	Group	Services	Country	Annual Report	Average number of employees	(Last year)	Turnover MEUR	CEO/President Managing Director (December 09)
53	49	Ricardo plc	I	England	08/09	1799	1799	225,11	Dave Shemmans
54	50	URS Europe Ltd (dt URS Corporation)	MD	England	08	1700	1700	149,44	Christine Wolff
55	56	Dorsch Gruppe	MD	Germany	08	1650	1500	74,00	Olaf Hoffmann
56	57	Kema Group BV	Enr	Netherlands	08	1648	1468	226,70	P.J.J.G Nabuurs
57	63	Norconsult AS	MD	Norway	08	1610	1230	233,01	John Nyheim
58	53	Buro Happold	MD	England	07/08*	1600	1625	138,94	Gavin Thompson
59	61	ILF Group	MD	Germany/Austria	08	1600	1300	166,00	Klaus Lässer
60	55	Prointec S.A	MD	Spain	08	1572	1500	120,00	Pres. Cesar Cañedo-Argüelles; CEO Alonso Domínguez
61	59	Ingérop S.A	MD	France	08	1538	1370	152,10	Yves Metz
62	58	Gleeds	PM	England	08*	1400	1380	115,83	Richard Steer
63	60	SETEC Group	MD	France	08	1313	1300	168,70	Gérard Massin
64	67	COTEBA Groupe	PM	France	*08	1300	1065	180,00	Alain Bentejac
65	65	BDP Building Design Partnership	MD	England	08/09	1225	1134	124,89	Peter Drummond
66	64	Movares Group BV	CE,E	Netherlands	08	1222	1207	171,70	Johan van den Elzen
67	78	RLE International Gruppe GmbH	I, PM	Germany	*08/09	1200	950	95,00	Ralf Laufenberg
68	71	Fichtner Group	Enr, MD	Germany	08	1184	1007	142,00	George Peter Fichtner
69	62	Pell Frischmann Group	MD	England	*08	1150	1300	59,17	Sudho Prabhu
70	92	RMJM Hillier Group	A,CE	England	07/08	1125	696	125,75	David Pringle, Tony Kettle, Hazel Wong
71	76	NIRAS Group A/S	MD	Denmark	08	1124	947	122,25	Carsten Toft Boesen
72	66	IOSIS Group	MD	France	08	1122	1115	158,00	Bernard Boyer & Bernard le Scour
73	74	Epsilon Group	I	Sweden	08	1094	981	120,56	Mats Boström
74	68	FMC Group (Finnmap Consulting Group)	CE, S, E, M	Finland	08/09	1060	1050	85,40	Tage Eriksson
75	72	Sogreah Consultants	MD	France	08	1050	1005	103,50	Jacques Gaillard
76	81	Drees & Sommer-Gruppe	PM	Germany	*08	1050	850	136,90	Hans Sommer
77	87	Grupo Ayesa	MD	Spain	08	1047	785	112.26	José Luis Manzanares Japón
78	69	Foster & Partners Ltd	A	England	08/09	1036	1018	191,37	Mouzhan Majidi
79	70	Tauw Group bv	MD	Netherlands	07	1013	1013	100,00	Wim Kox
80	89	TPF Group	MD	Belgium	08	1000	770	80,00	Thomas Spitaels
81	77	Multiconsult-group	MD	Norway	08	997	961	134,60	Håkon Sannum
82	79	Lahmeyer International GmbH	Enr	Germany	08	977	900	99,20	Henning Nothdurft
83	88	Rejler Group	E,I	Sweden	08	893	784	83,04	Peter Rejler
84	80	Golder Associates Europe Ltd	Env,CE, PM,Enr	England	08	876	876	95,00	Pietro Jarre
85	84	FCG Finnish Consulting Group	MD	Finland	08	859	816	79,40	Paul Paukku (jan 2009)
86	82	Sogeclair SA	I	France	08	844	847	73,89	Phillippe Robardey
87	94	RSK Group	Env	England	08/09	809	659	79,23	Alan Ryder
88	99	Reinertsen Engineering	MD	Norway	08	805	620	135,05	Erik Reinertsen
89	73	ABMI-groupe S.A	I	France	08	800	1000	62,00	Jean-Pierre Bregeon
90	91	Witteveen+Bos Consulting Engineers	MD	Netherlands	08	766	708	97,20	H. A. A. M. Webers
91	95	Gifford Partnership LLP	MD	England	08	763	657	62,85	Mark Stevenson
92	93	Alectia Group (formerly Birch & Krogboe group)	MD	Denmark	08	757	688	78,39	Ingelise Bogason
93	90	Cyril Sweett Group	PM	England	08	750	709	99,35	Dean Webster
94	101	Hoare Lea & Partners	E,M,Enr	England	*08/09	750	600	69,25	Gary Tucker
95	75	Safege Consulting Engineers	Env,S,CE	France	08	701	980	84,00	Jacques Bertrand
96	103	Flygfältsbyrån AB (purchased by COWI July 2009)	MD	Sweden	08	691	589	77,60	Anders Rydberg
97	97	Payma Cotas, S.A. (dt Bureau Veritas)	CE,S	Spain/France	08	682	650	45,84	Carlos Blay
98	104	Tyréns AB	CE,PM	Sweden	08	679	582	79,74	Ulrika Francke
99	96	Vattenfall Power Consult AB	Enr,E, CE	Sweden	07	661	652	95,16	Mikael Lundin
100	111	IV-Groep b.v.	MD	Netherlands	08	658	461	88,30	Rob van de Waal
101	113	Savant International	PM	England	08	652	450	51,59	Jonathan Harper
102	117	IBV Ingenieurbüro H.Vössing GmbH	MD	Germany	08	643	435	51,80	Hans-Theo Kühr, F. Thiessen
103	98	Archial Group (SMC Group) plc	A	England	08	631	631	53,47	Christopher Littlemore
104	85	PCG-Profabril Consulplano Group	MD	Portugal	08	628	803	40,71	Ilidio de Ayala Serôdio
105	102	Obermeyer Planen+Beraten GmbH	MD	Germany	*08	622	595	65,50	Maximilian Grauvogl
106	100	Elomatic Group Oy	I,MD	Finland	08	605	616	41,47	Olli Manner

The European top 300 consulting engineering and architectural groups

08/09	07/08	Group	Services	Country	Annual Report	Average number of employees	(Last year)	Turnover MEUR	CEO/President Managing Director (December 09)
107	109	Broadway Malyan Ltd	A	England	07/08	605	470	65,76	Peter Crossley
108	105	Peter Brett Associates	MD	England	*08/09	600	550	61,69	Stephen Capel-Davies
109	116	Bonifica Group	MD	Italy	08	600	437	30,00	Romina Boldrini
110	112	Asplan Viak Group	MD	Norway	08	565	454	65,91	øyvind Mork
111	115	Gruner-Gruppe AG	MD	Switzerland	08	550	445	41,64	Flavio Casanova
112	189	Müller-BBM GmbH	MD	Germany	08/09	530	240	83,00	Rolf Michelsen
113	137	Noble Denton Group Ltd	I,E	England	08	528	341	93,68	David Sutton
114	207	Neste Jacobs Group (former Rintekno)	I	Finland	08	519	214	108,50	Tom Främling
115	83	Citec Group	I, Env	Finland	08	510	840	32,80	Rune Westergård
116	106	Chapman Taylor LLP	A	England	08	510	510	62,95	John Oldridge with co-directors
117	107	Gauff Gruppe	MD	Germany	*08	500	500	60,00	Gerhard H. Gauff
118	108	Fairhurst	MD	Scotland	*08	500	500	0,00	Robert Mc Cracken
119	119	Enviros Consulting Ltd (subsidiary to Carillion plc)	Env,Enr	England	08	500	422	0,00	Barry Newby / Peter Portlock (MD)
120	156	INOCSA Ingeniera, S.L.	MD	Spain	07	500	300	34,70	Antonio Lorente
121	164	Consulgal Group, SA.	MD	Portugal	08	491	284	39,43	Rogério Monteiro Nunes
122	118	Xdin AB (Alten group Dec 2008)	I	Sweden	08	490	434	42,95	Thomas Ängkulle
123	114	White Architects AB	A,PM, Env	Sweden	08	466	445	51,62	Anders Svensson
124	120	Emch + Berger Gruppe	MD	Switzerland	08	450	410	34,70	Urs Schneider
125	140	Benoy Architects Ltd	A	England	08	441	333	45,15	Graham Cartledge
126	132	Cundall Johnston & Partners	CE,S,Env	England	07/08	425	354	38,06	Dave Dryden
127	148	Hifab Group	PM	Sweden	08	421	319	45,90	Jan Skoglund
128	123	ATP Architects and Engineers Group	A,CE, PM	Austria	08	420	398	53,77	Cristoph M. Achammer
129	125	NET Engineering S.p.A	MD	Italy	08	420	388	48,89	Giovanni Battista Furlan
130	171	INYPSA Informes y Projectos SA	MD	Spain	08	412	262	53,68	D. Ivan Franasco Lazcano Acedo
131	141	INROS LACKNER Group	MD	Germany	08	409	361	29,00	Uwe Lemcke
132	121	Antea S.A (acquired by Orangewoud NV October 2009)	Env	France	08	400	401	48,82	Jean-Philippe Loiseau
133	122	Amstein + Walthert AG	E,M	Switzerland	08	400	400	29,02	Christian Appert
134	127	gmp-Architekten von Gerkan, Marg und Partner	A	Germany	*08	400	380	56,00	Meinhard von Gerkan, Volkwin Marg
135	160	GFA Consulting Group	MD	Germany	08	400	290	58,00	Heiko Weissleder; Klaus Altemeier; Hans-Christoph Schaefer-Kehnert
136	153	Mannvit hf. (merger of Hönnun-VGK hf in 2007)	MD	Iceland	08	396	300	86,87	Eyjólfur Árni Rafnsson
137	143	Wardell Armstrong LLP	MD	England	08/09	394	398	33,63	Colin W. Brown
138	177	AHT Group AG	PM,CE,Env	Germany	08	385	250	38,00	Hubertus Schneider, CEO, Gerhard Lorisika, President
139	133	PRP Architects Ltd	A	England	08/09	383	352	47,39	Andy von Bradsky, Roger Battersby
140	124	Steer Davies Gleave Ltd	CE	England	08/09	376	397	48,08	Stephen Crouch
141	130	ABT Holding BV	MD	Netherlands	08	375	372		Ton Boerhof, Frans van Herwijnen, Walter Spangenberg
142	136	Pick Everard Ltd	MD	England	08	375	350	0,00	David Brunton
143	129	Iberinsa, Ibérica de Estudios e Ingenieria S.A	MD	Spain	07	373	373	31,75	Jesus Contreras Olmedo
144	144	Deerns Consulting Engineers BV	E, M, PM, I	Netherlands	08	371	325	45,00	Jan Karel Mak
145	175	Basler & Hofmann AG	MD	Switzerland	08	370	259	50,06	Dominik Courtin
146	131	3DReid Architects Ltd	A	England	*07/08	367	370	22,96	Charles Graham-Marr
147	150	Grupo JG SA	M,E	Spain	08	350	311	23,00	Josep Túnica Buira
148	139	Barton Willmore Group	A,PM	England	07/08	343	283	41,55	Ian Tant
149	128	SLR Group	Env	England	08	340	373	38,61	David Richards (MD&CEO); Neil Penhall (MD)
150	135	Italconsult S.p.A	PM	Italy	08	340	350	22,35	Giovanni A. Torelli ; Enrico Salza
151	145	Olof Granlund group	E,M	Finland	08	340	323	27,80	Reijo Hänninen
152	148	GPO Ingenieria, S.A.	MD	Spain	08	340	320	28,40	Emilio Vidal
153	152	Verkís hf.(merger VST, Fjarhitun, Fjölhönnun in 2008. Combined figures)	MD	Iceland	08	339	304	55,01	Sveinn Ólafsson

PM = Project Management, A = Architecture, CE = Civil-/S = Structural Engineering, Env = Environment, Enr = Energy, E = Electrical, M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

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154	142	Dettling + Partner Architekten AG	A	Switzerland	07	332	332	20,19	Kasper Dettling
155	162	RAPP-Gruppe AG, Ingenieure+Planer	MD	Switzerland	08	323	289	28,45	Mathias Rapp ; Urs Sandmeier
156	159	CDM Gruppe (part of CDM Group)	CE	Germany	08	322	290	37,30	Peter Jordan
157	146	DDC Consulting & Engineering Ltd	PM	Slovenia	07	319	322	28,00	Ljubo Znidar
158	158	HR Wallingford Group Ltd	CE, Env,I	England	08/09	319	290	32,23	Stephen W. Huntington
159	110	Assmann Beraten + Planen	MD	Germany	08	315	470	27,81	Jochen Scheuermann
160	157	Arkitektfirmaet C.F.Møller	A	Denmark	08	313	294	34,91	Lars Kirkegaard, Mads Møller
161	151	JMP Consultants Ltd	CE	England	07/08	309	309	29,76	Ian Cameron
162	149	INBO Architects/Consultants	A,PM	Netherlands	08	308	318	30,21	Dirck Ringeling
163	126	Ebert-Ingenieure GdbR.mbH	E, M, Env, Enr	Germany	08	300	380	30,00	Ernst Eber and directors
164	155	Ernst Basler & Partner Ltd	MD	Switzerland	*08	300	300	18,50	Hansjoerg Hader
165	183	BG Bonnard & Gardel Groupe SA	MD	Switzerland	08	300	246	31,78	Jean-Daniel Marchand
166	187	FLH Koncernen ApS	MD	Denmark	08	300	241	18,39	Lars Kragh
167		Stride Treglown Group Ltd	A	England	08	295	292	21,62	Robert Whittington
168	166	Moe & Brødsgaard A/S	MD	Denmark	08	293	270	29,64	Christian Listov-Saabye
169	170	Nightingale Associates	A	England	08	292	267	29,03	Colin Hockley
170	161	Krebs und Kiefer Beratende Ingenieure	CE,S, PM	Germany	*08	289	289	22,00	Albert Krebs
171	163	Sinclair Knight Merz Europe	MD	England	07/08	284	284	26,71	Peter McKellar
172	165	GETINSA S.A	CE, Env, PM	Spain	07	284	284	25,59	Pedro D. Gomez
173	192	FASE-Estudos e Projectos S.A	MD	Portugal	08	283	236	17,92	Manuel Quinaz
174	201	Insinööritoimisto Comatec Group	I, Enr	Finland	08	282	223	23,39	Aulis Asikainen
175	181	Temelsu International Engineering Services Inc.	MD	Turkey	08	280	250	10,94	Demir Inözü
176	191	SITO Group Oy	CE, Env, PM	Finland	08	277	236	24,30	Kimmo Fischer
177	223	PBR Planungsbüro Rohling AG Architekten u Ingenieure	MD	Germany	08	275	200	22,00	Heinrich Eustrup
178	230	EnergoRetea AB	E,M	Sweden	08	275	192	28,41	Martin Dahlgren
179	172	Keppie Design	A	Scotland	07/08	273	261	18,31	David Stark
180	266	A-Insinöörit Group	S, CE, PM	Finland	08	273	157	24,95	Petri Laurikka
181	174	CSD Group	Env, PM, CE,S	Switzerland	08	270	260	26,51	Bernhard Matter
182	198	Murray O´Laoire Architects Ltd	A	Ireland	08	270	225	20,87	Calbhac O'Carroll
183	199	Baur Consult GbR	MD	Germany	08	270	225	15,60	Andreas Baur
184	169	Dolsar Engineering Ltd	MD	Turkey	08	265	268	10,40	H. Îrfan Aker
185	168	Burckhardt+Partner AG Architekten Generalplaner	A	Switzerland	08	263	268	52,11	Peter Epting
186	196	Bengt Dahlgren AB	M,Enr	Sweden	08	259	227	26,80	Åke Rautio
187	173	AEPO S.A Ingenieros Consultores	MD	Spain	07	256	260	26,82	David Ortega Vidal
188	184	Deltamarin Oy	I	Finland	08	251	245	21,80	Mika Laurilehto
189	134	Sheppard Robson	A	England	07	250	350	0,00	Andrew German
190	182	HKR Architects	A	Ireland	*07/08	250	250	23,00	Jerry Ryan
191	185	Arkitema K/S	A,PM	Denmark	08	250	243	27,67	Peter Hartmann Berg
192	208	Arkitektbüro HPP Hentrich-Petschnigg & Partner GmbH *	A	Germany	*08	250	212	27,00	Joachim Faust, G. Feldmeyer
193	214	LINK Signatur Group	A	Norway	08	250	201	22,76	Siri Legernes
194		Transprojekt Gdanski Spolka	A, CE	Poland	07	250	265	32,24	Andrzej Michal Luty
195	180	SC Metroul S.A.	MD	Romania	07	244	244	9,59	George Rozorea
196	186	Uvaterv Engineering Consultants Ltd	MD	Hungary	07	234	242	14,00	Gyula Bretz
197	190	IBE Consulting Engineers	MD	Slovenia	08	234	240	16,26	Uros Mikos
198	193	Pragoprojekt a.s	CE	Czech Republ.	07	234	234	13,96	Marek Svoboda
199	210	Bartels bv	CE,S,PM	Netherlands	08	233	211		Frank Lekkerkerker
200	178	PDM Group	I	Netherlands	08	232	250	27,00	H.J.P.M. Mesterom
201	232	Scott Brownrigg Architects	A	England	07/08	232	190	27,27	Jonathan Hill
202	138	HPC HARRESS PICKEL CONSULT Group	Env,PM,CE	Germany	08	230	340	29,28	Andreas J. Kopton, Josef Klein-Reesink
203	176	Amberg Group	CE,S,PM	Switzerland	*08	230	251	0,00	Felix Amberg
204	188	Dopravoprojekt, a.s.	CE, S, A, PM	Slovakia	08	228	241	20,99	Gabriel Koczkás
205	194	O.M.A. Office for Metropolitan Architecture	A	Netherlands	08	228	300	41,50	Victor van der Chijs, Rem Koolhaas, Ellen van Lom

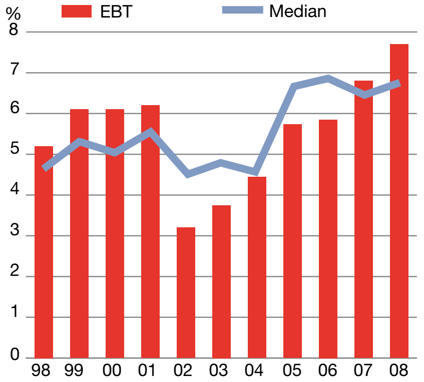
The European top 300 consulting engineering and architectural groups

08/09	07/08	Group	Services	Country	Annual Report	Average number of employees	(Last year)	Turnover MEUR	CEO/President Managing Director (December 09)
206	205	Aukett Fitzroy Robinson plc	A	England	07/08	228	215	28,45	J. Nicholas Thompson
207	254	Infotiv AB	I	Sweden	07/08	228	167	18,72	Alf Berndtsson
208	154	Advin B.V. - Adviseurs en Ingenieurs	MD	Netherlands	08	227	300		John Walraven
209		Avalon Enterprise AB	I	Sweden	08	222	232	22,31	Peter Mattisson
210	167	RKW Architekten & Co, KG	A	Germany	*08	220	270	30,00	Friedel Kellerman, Hans G. Wawrowski
211	203	ETV-Eröterv Rt.	Enr,CE,PM	Hungary	07	220	220	16,09	József Dénes
212	206	Allies and Morrison Architects Ltd	A	England	*07/08	220	215	28,33	Bob Allies
213	243	IPROPLAN Planungs GmbH	MD	Germany	08	220	180	15,00	Jörg Thiele
214		Efla hf.	MD	Iceland	08	216		45,75	Guðmundur Þorbjörnsson
215	231	Condesign AB	I	Sweden	08	214	192	15,32	Nils-Olov Johnson
216	249	JBA Consulting	CE, Env	England	07/08	212	173	13,07	Jeremy Benn
217	224	Olajterv Group	CE, Enr	Hungary	*07	210	200	12,00	János Pakucs
218	195	Soditech Ingenerie S.A	I	France	08	208	230	12,87	Maurice Caillé
219	211	WRc plc	Env	England	08/09	207	210	16,00	Ron Chapman; Roberto Zocchi
220	179	O.B.H-Group A/S	MD	Denmark	08	206	250	23,09	Børge G. Danielsen
221	247	Structor Group	CE,PM	Sweden	08	202	175	28,11	Jan Stråth, Per Fladvad, Olof Hulthén
222	215	DSSR Consulting Engineers (form Donald Smith Seymour & Rooley)	E,M	Scotland	08	200	200	0,54	Gordon Meikle
223	216	Troup Bywaters + Anders	E,M	England	*07	200	200	0,00	Neil Weller
224	217	Curtins Group	CE,PM	England	*08	200	200	0,00	Rob Melling
225	221	Scholze Ingenieur GmbH	E,M,I,Enr,PM	Germany	08	200	200	15,00	Gerd Scholze
226	222	Herzog & de Meuron Architekten AG	A	Switzerland	*08	200	200	14,62	Pierre de Meuron; Jacques Herzog
227	225	Consitrans S.R.L.	CE,S,Env,PM	Romania	*07/08	200	200	10,00	Eduard Hanganu, President; Valentin Robert Urlan, CEO
228	226	DIWI-Consult GmbH	MD	Germany	*08	200	200	9,20	William V. H. Foyle; Peter Winkler
229	227	Vahanen Oy	CE	Finland	08	200	196	26,30	Risto Vahanen
230	234	O.T.E. Ingenerie SA	MD	France	08/09	200	186	15,86	Jean Ernest Keller
231	245	Knightec AB	I	Sweden	08	200	176	17,25	Dimitris Gioulekas
232	258	Llewelyn-Davies -Yeang Ltd	A,IA	England	07/08	200	165	0,00	Stephen Featherstone
233	253	Rogers Stirk Harbour & Partners (fd Rickard Rogers)	A	England	07/08	199	168	47,96	Rickard Rogers
234	250	Adviesbureau Peutz & Associés B.V	Env,CE, I	Netherlands	*08	196	172		J. H. Granneman
235	219	Clarke Bond Group Ltd	S,CE,Env,PM	England	08	191	200	19,07	David Harding
236	233	ISC Group	MD	Denmark	08	190	200	23,61	Kjeld Thomsen
237	251	HENN Architekten GmbH	A	Germany	*08	190	170	18,00	Gunter Henn
238	209	Aveco de Bondt BV	CE	Netherlands	*08	183	212	17,00	Gerrit Paalman
239	218	High-Point Rendel Group	CE,S,PM	England	07/08	182	200	25,38	Kelvin W. T. Hingley
240	228	Technital SpA	CE	Italy	08	182	195	47,28	Alberto Scotti
241	285	Tengbom	A	Sweden	08	182	141	18,14	Magnus Meyer
242	235	GOPA-Consultants Group	PM,I,Env	Germany	08	181	185	55,40	Martin Güldner, Robert Gaertner, Hans Otto,
243	240	D´Appolonia S.p.A	MD	Italy	08	181	181	40,30	Alessandro Vaccaro
244	213	Steinbacher-Consult GmbH	CE, PM	Germany	08	180	203	19,80	Stefan Steinbacher
245	241	Roughton Group	MD	England	07	180	180	16,73	Michael A Ross; John Saunsbury
246	242	Metroprojekt Praha A.S	MD	Czech Republ.	07	180	180	18,05	Jiri Pokorny
247	244	Leonhardt, Andrä und Partner Beratende Ing. GmbH	S	Germany	*08	180	179	21,00	Holger S. Svensson
248	284	Purcell Miller Tritton	A	England	07/08	179	142	12,60	Mark Goldspink
249	220	Joynes Pike Group	CE,S,Env	England	07/08	177	200	9,42	Trevor Crawley
250	246	Hulley & Kirkwood Consulting Engineers Ltd	E,M	Scotland	08	176	176	15,18	Sommerville Telfer
251	248	DEGW Group	A	England	07	174	174	21,45	Despina Katsikakis, Douglas Brown
252	265	Polartest Oy	Enr	Finland	08	174	157	20,40	Matti Andersson
253	252	Planungsgruppe M+M AG , PGMM	E,M,PM, Enr	Germany	*08	170	170	12,00	Willie Kienzle, Hermann Ott

08/09	07/08	Group	Services	Country	Annual Report	Average number of employees	(Last year)	Turnover MEUR	CEO/President Managing Director (December 09)
254	256	HLM Architects	A	England	07/08	170	165	0,00	Christopher Liddle
255	262	Consat Engineering AB	I	Sweden	08	170	158	16,71	Jan-Bertil Johansson
256	264	JSK Architekten GmbH	A	Germany	*08	170	158	15,40	Helmut W. Joos
257	293	Bureau D´ études Greisch	CE,S,A,PM	Belgium	*08	168	132	20,00	Jean-Marie Cremer
258	236	Frankham Consultancy Group	MD	England	08/09	165	185	16,23	S J Frankham
259	239	Lewis & Hickey Architects	A,PM	England	08/09	165	182	11,83	Paul Miele
260	257	Centroprojekt a.s	MD	Czech Republ.	08	165	165	14,57	Vladimir Kudela
261	277	SD Ingénierie Holding SA	MD	Switzerland	08	161	148	15,77	J. D. Girard
262	255	Heinle, Wischer und Partner	A,PM	Germany	*08	160	167	17,60	Monika Wurfbaum, Alexander Gyalokay
263	263	Max Fordham LLP	E,M, Env	England	07/08	160	158	10,51	Bill Watts
264	272	Cheming A.S	CE,I,M,PM	Czech Republ.	08	160	150	12,50	Marek Spok
265		Transprojekt Krakowskie Biuro Sp. Z o. O	A, CE	Poland	07	160		23,91	Leszek Chelminski
266	276	Temagroup Sweden AB	A,PM	Sweden	08	157	148	17,23	Håkan Persson
267	281	Bjerking Ingenjörsbyrå AB	CE,M	Sweden	08	157	144	17,01	Roine Gillberg
268	289	EKJ Rådgivende Ingeniorer A/S	MD	Denmark	08/09	157	139	17,20	Jørgen Nielsen
269	273	CTS Engineering Oy	I	Finland	08	156	150	13,78	Antti Lukka
270	269	Årstiderna Arkitekter	A	Denmark	07/08	155		14,75	Per Laustsen
271	268	Michael Punch + Partners	S,CE,Env,PM	Ireland	07/08	152	155	18,42	John Pollock
272	204	The BWB Partnership	CE,S, Env	England	07/08	150	216	20,60	Malcolm Wright Steven Wooler
273	260	Henning Larsen Architects	A	Denmark	07/08	150	160	20,15	Mette Kynne Frandsen
274	271	SGI Consulting SA	MD	Luxemburg	*06	150	150		Michel Nardin
275	274	Lyons+Sleeman+Hoare Architects	A	England	*08	150	150	9,44	Max Lyons
276		Austin Smith Lord Architects Ltd	A	England	07/08	150	125	11,02	Richard Pullen
277	278	Cauberg-Huygen	CE, Env	Netherlands	08	148	145	15,76	J.J.M. Cauberg
278	294	Transprojekt- Warszawa Sp. Z o. O	CE	Poland	09	147	131		Tadeusz Suwara
279		WTM Engineers Ulrich Jäppelt	MD	Germany	07	146	146	14,10	Karl Morgen, Stefan Ehmann,
280	280	Prokon Engineering Ltd	MD	Turkey	07	145	145	7,61	Hasan Özdemir, Ismail Salici
281	282	TC Project Management B.V	I	Netherlands	*08	145	144	11,80	Rudie Veenendaal
282		DGMR raadgevende ingenieurs BV	Env	Netherlands	08	144		14,85	P.J. van Bergen
283	259	JJM Ltd Co	PM,I	Poland	07/08	140	160		Marek Poncyljusz
284	270	Atelier Jean Nouvel S.A	A	France	*08	140	150	20,00	Michel Pelissie, Jean Nouvel
285	275	B+S Ingenieur AG	MD	Switzerland	*08	140	148	0,00	Urs Ochsner
286		Ingenieursbureau BV EPG	MD	Netherlands	08	140	125	10,00	
287	295	UtiberTransport Consulting Management Ltd	CE,PM	Hungary	*08	139	130		Auth Gyorgyi
288	296	PTL	PM	Norway	08	138	129	21,86	Sven Erik Nørholm
289	299	Kragten B.V	CE, Env	Netherlands	07	138	127		T.A.A.G. Stevens
290		Goudappel Coffeng B.V	MD	Netherlands	08	135		17,15	P.H.J. Van der Mede
291		Midtconsult A/S	MD	Denmark	07/08	135		13,41	Jens Lauritsen
292	300	OPAK AS	PM,Enr,E,M	Norway	08	133	126	16,90	Jan Henry Hansen
293	297	Hjellnes Consult AS	MD	Norway	08	132	128	20,94	Geir Knudsen
294	283	Clancy Consulting	MD	England	07/08	131	143	0,00	Alan Bramwell
295		Price & Myers	S	England	07/08	131	140	14,13	Sam Price
296		Verebus Engineers B.V	MD	Netherlands	08	131	120	9,66	Kees Aling
297	287	Geodata S.p.A	CE	Italy	08	130	140	15,18	CesareSalvadori
298		ADO (Athens Development Office) S.A	MD	Greece	08	130		10,00	George Kolliopoulos
299	279	Uticon Dynatherm	I,Env, PM	Netherlands	08	127	145	10,27	Simon Bruijnooge
300	298	EPR Architects Group Ltd	A	England	07/08	127	127	14,57	Greg Craig

PM = Project Management, A = Architecture, CE = Civil-/S = Structural Engineering, Env = Environment, Enr = Energy, E = Electrical, M = Mechanical/HEVAC, I = Industrial, MD = Multi Disciplinary

Result margin: European top 300



Source: Swedish Federation of Consulting Engineers and Architects (STD)

project is regarded as being a major step forward in the Group's establishment in Russia, and as a motivator in finding new assignments within the country.

Arup involved in Australia's largest road infrastructure project

Arup will, together with Parsons Brinckerhoff (PB), plan, design and manage Australia's largest ever road infrastructure project. The assignment incorporates all access roads and links surrounding Brisbane Airport and will cost a total of approximately AUD 4.8 billion. In joint venture with Beijing Highway & Planning Design Institute, COWI, First Harbour and Shanghai Tunnel, Arup will take part in the feasibility study and preliminary design of the main bridge section between Hong Kong, Zhuhai and Macau. The bridge is a 38 km-long composite link between the three cities on the South Chinese Lake. Arup's involvement will include bridge design and the planning of tunnel projects, and planning for the construction of man-made islands.

Halcrow has been commissioned to perform the detailed planning design of the Kishanganga (330 MW) hydro power project in India, one of Halcrow's largest-ever hydro power projects. The project will take seven years to complete.

A Halcrow-led consortium has been awarded the contract to evaluate and plan a new high-speed rail system in Poland. The new train connection will be over 500 km long and have 40 stations. The project is valued at GBP 10 million and will extend over three years.

EGIS and IOSIS merge

In October, EGIS and IOSIS announced their intention to form an alliance and establish the largest engineering consultancy in France within the areas of building, civil works and infrastructure following the acquisition by EGIS of 34 % of the shares in IOSIS Holding. The groups will establish a joint subsidiary with a focus on infrastructure and sustainable housing. The new group will have some 8 400 employees and a turnover of just over EUR 700 million, 40 % of which from outside France.

David Cramér
Market analyst, Swedish Federation of Consulting Engineers and Architects

Financial information and statistics has been collected partly from Market Manager Partner, Dow Jones Companies and Executives, company homepages and by direct contacts with the companies.

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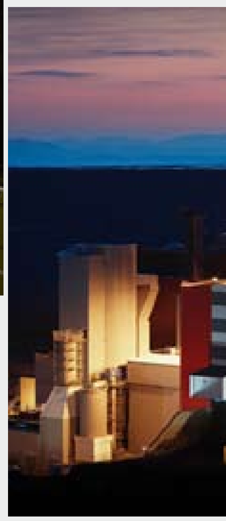

The Swedish Federation of Consulting Engineers and Architects, STD, works with the best interests of the member companies in mind, with the aim of strengthening their competitiveness and long-term profitability. STD endeavours to promote a high level of quality and profitability, sound development and good working conditions in the member companies.

Our operations are founded on four basic cornerstones:

- visibility
- consulting operations
- salary and employment conditions
- competence development and renewal.

STD is part of Almega – an organisation for service companies in Sweden. Almega is the largest group of employers' associations in the Confederationof Swedish Enterprise.

STD is a member of FIDIC (a global engineering consultancy organisation), EFCA (the European counterpart), and UNICE (European employers' confederation). We cooperate also with the Swedish Association of Architects in ACE (Architects Council of Europe).

STD Svensk Teknik och Design

ARKITEKT- TEKNIK- OCH INDUSTRIKONSULTFÖRETAGEN I SAMVERKAN

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