



A Sector Review

November 1999

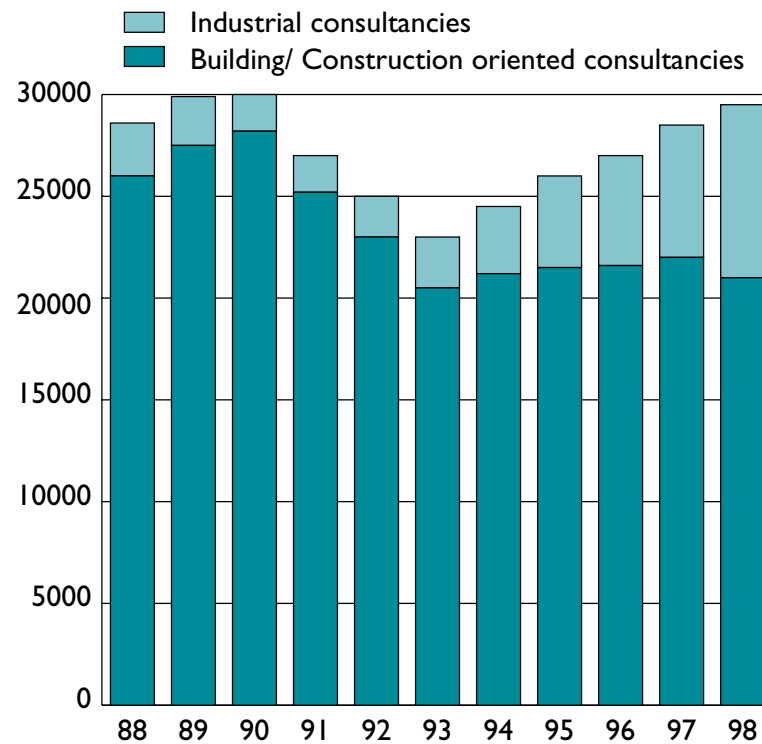
**The Consulting Engineering and Architectural
Groups. A Swedish and International survey.**

The charts published in this Sector Review relate to figures from
Annual Reports for 1998 and 1999/99.

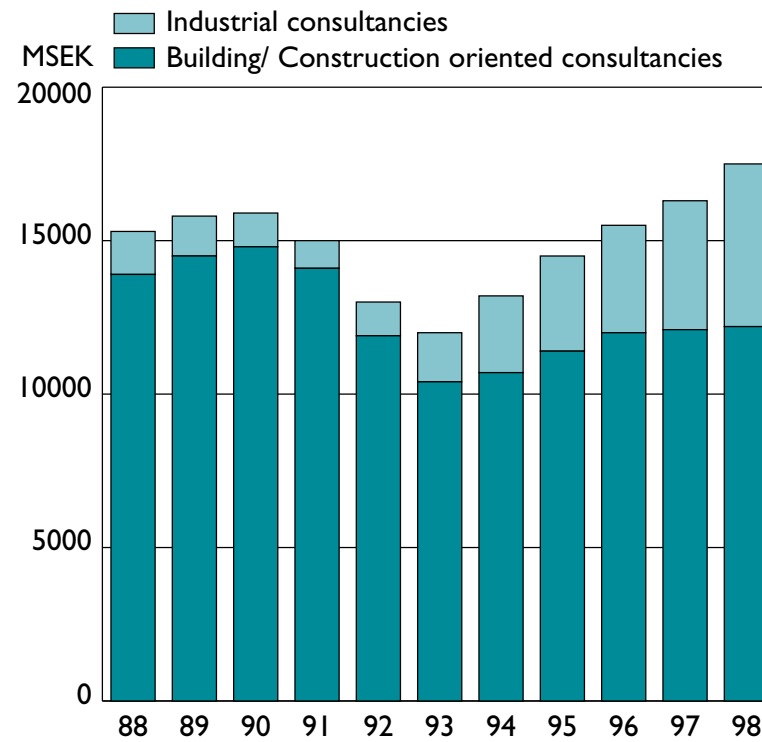
The Sector

Average number of employees	29,500	(28,500)
Turnover, billion SEK	17.5	(16.3)
Number of groups	4,900	(5,000)

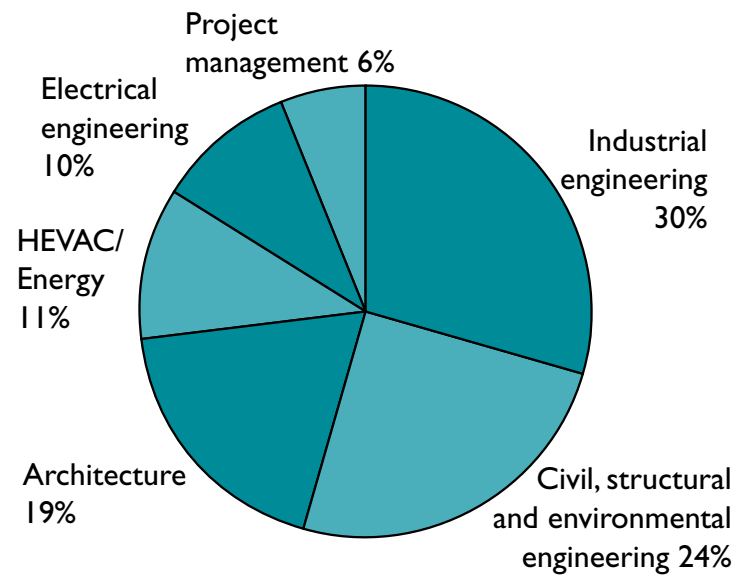
Average number of employees in the Sector



Turnover in the Sector



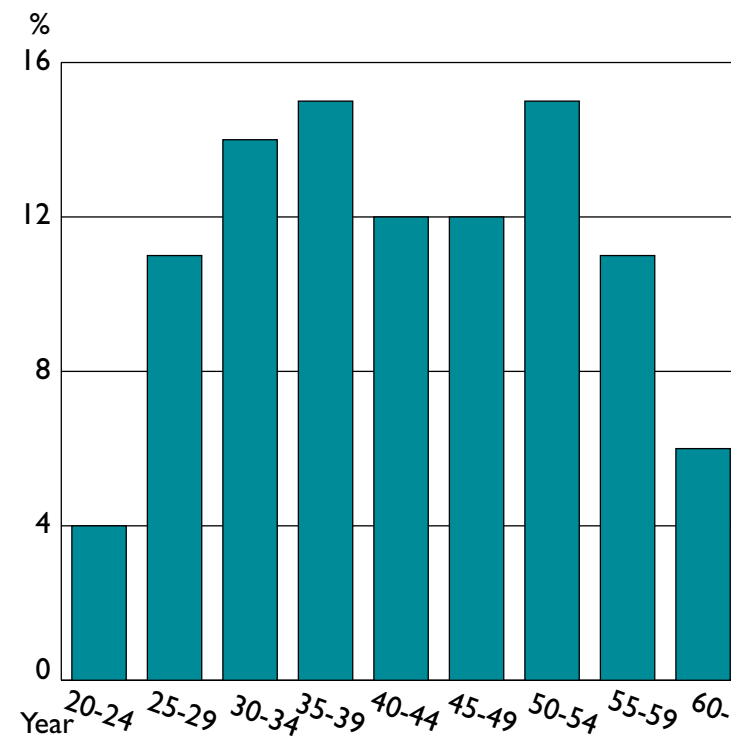
Share of the Sectors turnover within different sub-sectors



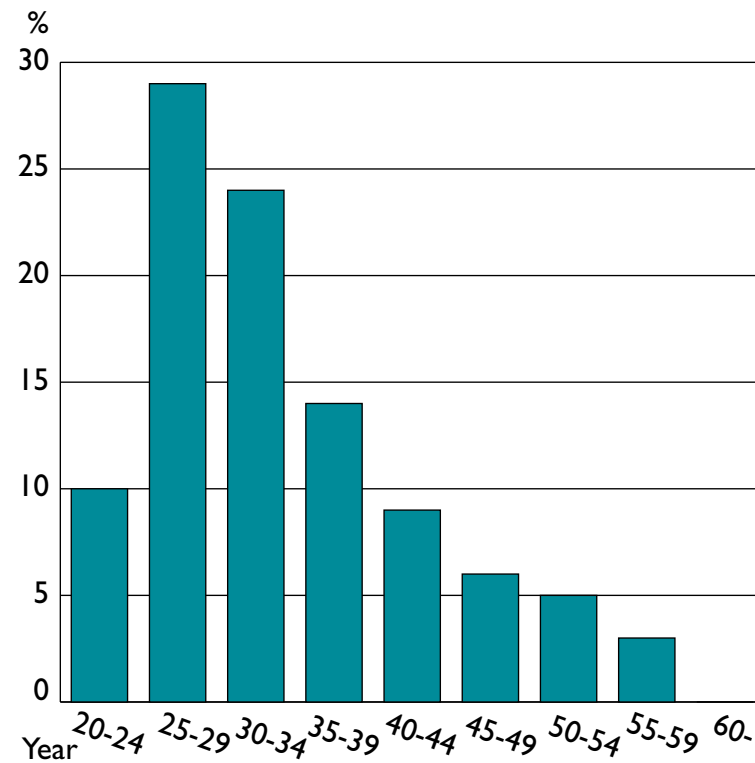
Turnover/employee

(in SEK thousand)	1998	1997	1996
Management consultants	1600	1380	1200
Internet consultants	700	—	—
IT consultants (admin.)	1050	1160	1090
Lawyers' offices	1200	1150	1150
Market surveyors	830	860	1070
Public relations and communication	990	960	970
Auditors	800	750	760
and as per our table on 9			
Industrial engineering consultants	726	797	730
Architects/building engineering consultants	730	674	680

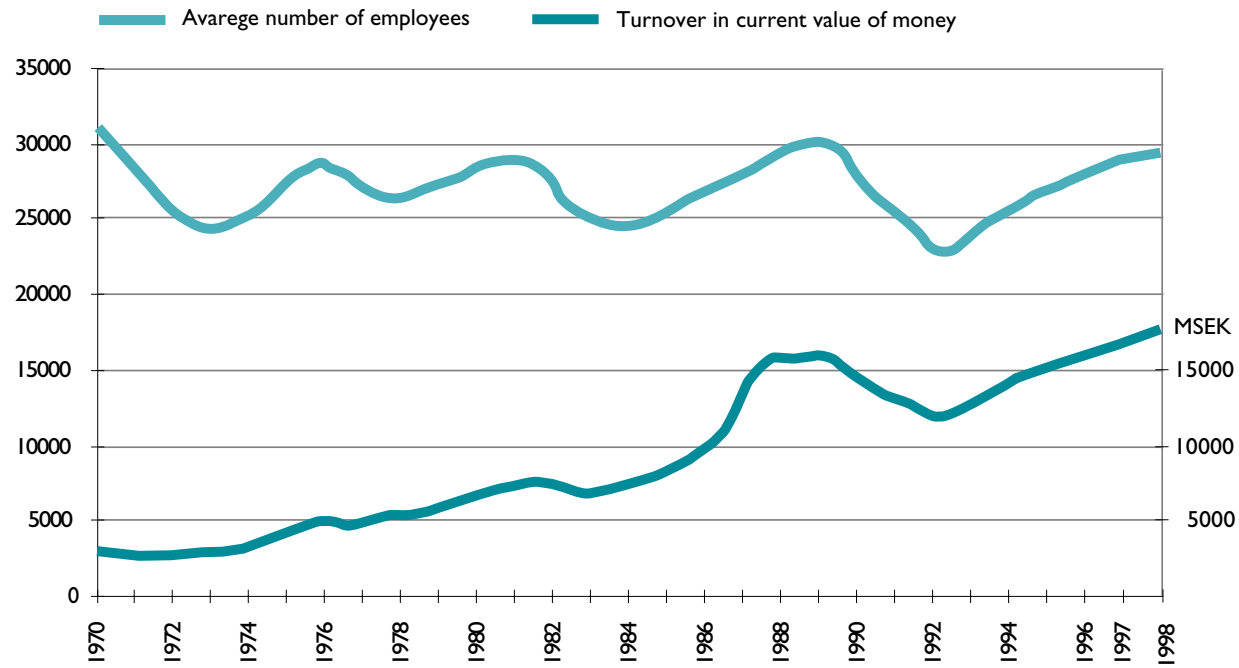
Age distribution – Architectural firms and building/civil work-oriented consultancies



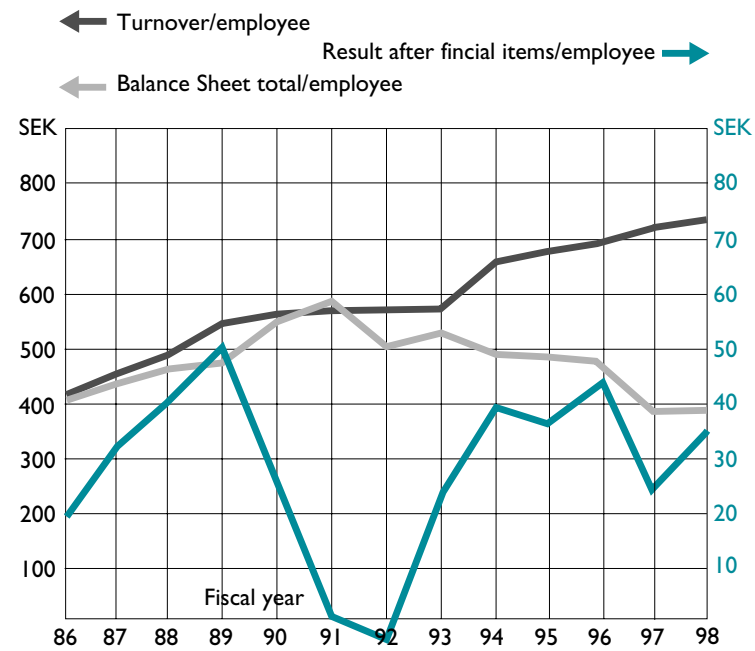
Age distribution – Industrial Consultancies



The development of the Sector



The top 30 Swedish groups



The top 30 Swedish groups

	Turnover per employee			Result after fin.items/employee		
	1998/99	1997/98	1996/97	1998/99	1997/98	1996/97
The top 30 groups of which	729	707	693	34	24	45
building/construction oriented	730	674	680	23	6	39
industrial	726	797	730	61	73	71
The top 200 groups of which	735	710	697	38	27	44
building/construction oriented ¹⁾	740	685	691	29	13	30
industrial	724	791	730	60	70	70

¹⁾ Of which the architectural groups had a turnover per employee of SEK 761 000 (735¹⁾ and the consulting engineering groups SEK 737 000 (680¹⁾. The result after financial items per employee was SEK 32 000 (30¹⁾ for the architectural groups and SEK 29 000 (10¹⁾ for the consulting engineering groups.

Consulting companies revalued on the Stock Exchange

Market value	99-10-29	98-10-30	97-10-30
Sigma	2218	1508	594
SWECO	554	296 *)	977
Semcon	1023	1170	598
Jaakko Pöyry	1345 **)	1100 **)	1200
ÅF	604	684	655
Scandiaconsult	550	245	278
Jacobson & Widmark	506	242	195
KM	244	104	153
INAC	26	35	

*) For this comparison, the market value of Humlegården, SEK 933 million, has been kept separate.

**) Of which approx. 32 on the Stockholm Stock Exchange and the remainder on the Helsinki Stock Exchange

The consulting engineering firms are valued at approximately SEK 0.25 ñ 1.4 million /employee. The pronounced IT and Internet consultancies are valued at approx. SEK 1.0 ñ 5.0 million /employee.