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## Knowledge based services are an increasingly indispensable lever for the creation and implementation of the built and industrial assets in all 27 EU countries

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The results for the 27 EU countries of the first global survey<sup>1</sup> on knowledge based services for the creation and implementation of the built and industrial assets were made public at the general assembly meeting of EFCA<sup>2</sup> in Brussels on 31<sup>st</sup> of May. The survey was ordered by EFCA and FIDIC<sup>3</sup> respectively the European and international federations of the engineering consultancy industry.

The aggregated supply and demand for engineering, architecture and research & development services in the domestic EU27 market have been estimated to around € 351 billion. In turn these services facilitated a € 2,924 billion global investment in the EU in 2012.

These creative services lever investments by 8.3 times in built and industrial assets. In other terms they represent an average 12 % of these investments. **This 12% ratio has been measured during the period 2008 - 2012 with minor discrepancies among the 27 EU countries. This is the first surprising result of that survey.**

**For the period 2008 - 2012, the study revealed a strict correlation between Gross Capital Fixed Formation [mainly the non-financial investments] and the use of these services in each EU country.** This second remarkable result is based on figures from the System of National Accounts aggregated by Eurostat. For the period 2008 to 2011, the services' production decrease (11%) in the EU ran parallel with the decrease of investments, but seems to increase again in 2012.

These services are provided mainly (51 %) by dedicated professionals, particularly by the engineering consultancy industry and architects, partially (23%) by public and private in-house services and by other industries (26 %) like contractors and suppliers of industrial equipment as an additional service. These ratios differ from one country to another. However the ratio of engineering consultancy and architecture services is higher in western European countries compared to eastern countries.

In 2012, the total export out of Europe have been assessed to about 11 % of the European production of these services , whereas imports equalled about 10% of it.

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<sup>1</sup> Bricad Associates, Switzerland

<sup>2</sup> **EFCA (European Federation of Engineering Consultancy Associations)** has member associations in 25 countries, and is the sole European federation lobbying on behalf of engineering consultancy and related services, a sector that employs around one million people in Europe. For more information: [www.efcanet.org](http://www.efcanet.org)

<sup>3</sup> FIDIC, the International Federation of Consulting Engineers represents globally the consulting engineering industry. As such, the Federation promotes the business interest of firms supplying technology-based intellectual services for the built and natural environment. For more information: [www.fidic.org](http://www.fidic.org)