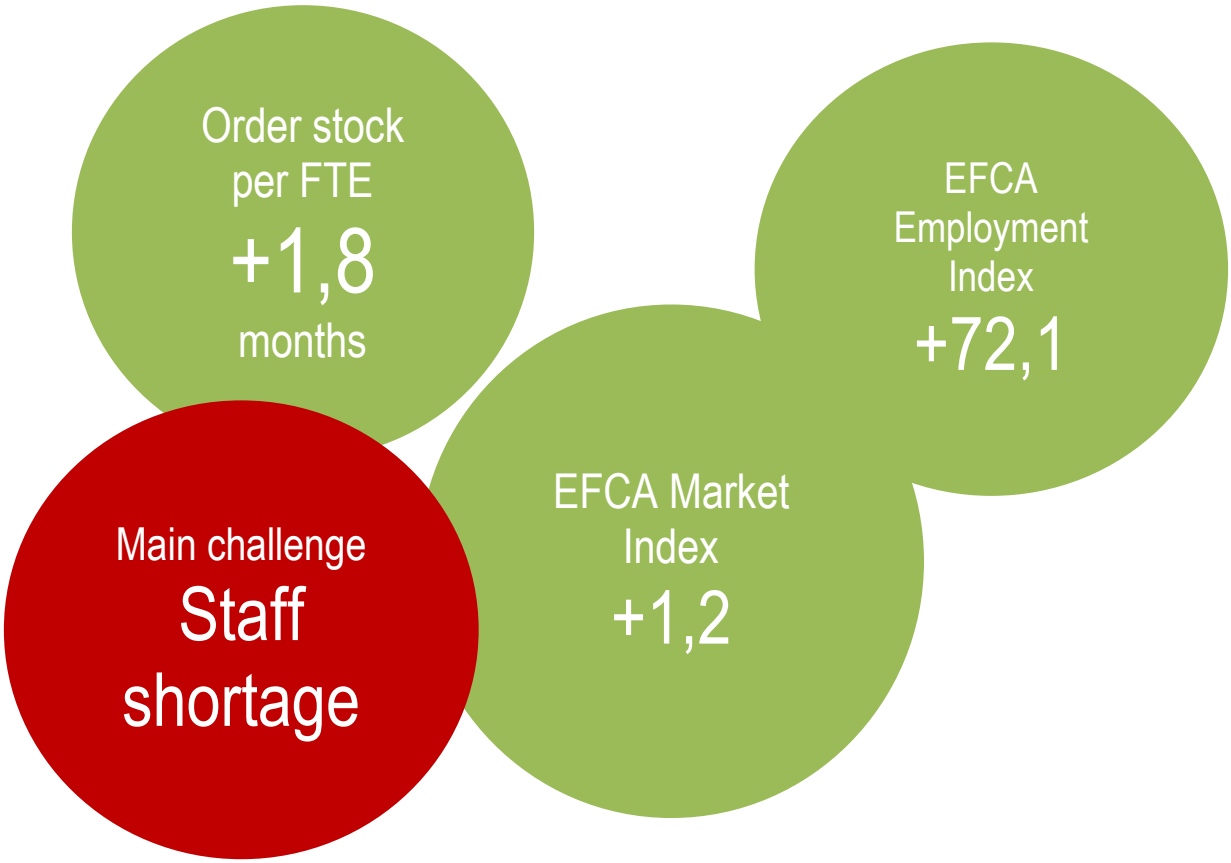
The State of the European Consulting Engineering Sector

BAROMETER autumn 2025

efca
European Engineering Consultancies



Participating Associations, in this survey

Austria, ACA	Finland, SKOL	Italy, OICE	Portugal, APPC	Sweden, FSIC
Belgium, ORI	France, Syntec / Cinov*	Latvia, LIKA	Romania, ARIC	Switzerland, suisse.ing
Bulgaria, BACEA	Germany, VBI	Luxemburg, OAI	Russia, NACEC **	Netherlands, Koninklijke NLingenieurs
Czech Republic, CACE	Greece. Hellasco	Macedonia, ACEMA	Serbia, ACES	Türkiye, ATCEA
Denmark, FRI	Hungary, AHCEA	Norway, RIF	Slovenia, NACES	Ukraine, ICEG
Estonia, EAACEC	Ireland, ACEI	Poland, SIDIR	Spain, TECNIBERIA	United Kingdom, ACE ***

* France is represented by both Syntec-Ingénierie and Cinov. Their replies are aggregated and presented as one.
** Russia's EFCA observer membership is currently suspended.
*** United Kingdom (ACE) is a cooperating association.

EFCA Economic Environment Committee

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The Economic Environment Committee has produced this report and analysis based on best available information on the current state of business in the autumn of 2025, collected through a survey by the member associations of EFCA for their respective countries. For European averages, national figures have been weighted by full time employees on the market of each country according to Eurostat figures. For the latest Eurostat figures see the appendix.

If you want to contact the Committee, please contact the EFCA secretariat - efca@efca.be

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Executive summary

Market shows signs of stabilisation

Order stock remains high. Profitability holds. Staff shortage is still the top concern.

Following a period of recovery, the consultancy and engineering industry is showing signs of stabilisation. The EFCA Market Index has increased by 1.2 points, indicating a slightly more positive outlook than in spring 2025. Still, over half of the participating countries report stable or improving market conditions.

This semester's EFCA Barometer continues to highlight the various market segments. It appears that the energy and transport/infrastructure sectors are leading market growth, while buildings, industry, and water show regional variation.

Consequently, shortage of qualified staff remains the key challenge for the industry, as it has been since 2021. This is a significant issue in high-demand countries, but across Europe it's becoming less severe. Rising labour costs have emerged as a more pressing concern, now ranked second, followed by bureaucracy and political uncertainty. Lack of projects and late payments are other concerns for the industry.

Employment figures have strongly rebounded. The EFCA Employment Index has increased by 71.2 points, close to but lower than 2024 levels. This reflects a better-than-expected change in the markets, across Europe and is reflected across the different market segments. Expectations for the next six months suggest a modest decrease, with many markets anticipating a neutral development in staff numbers.

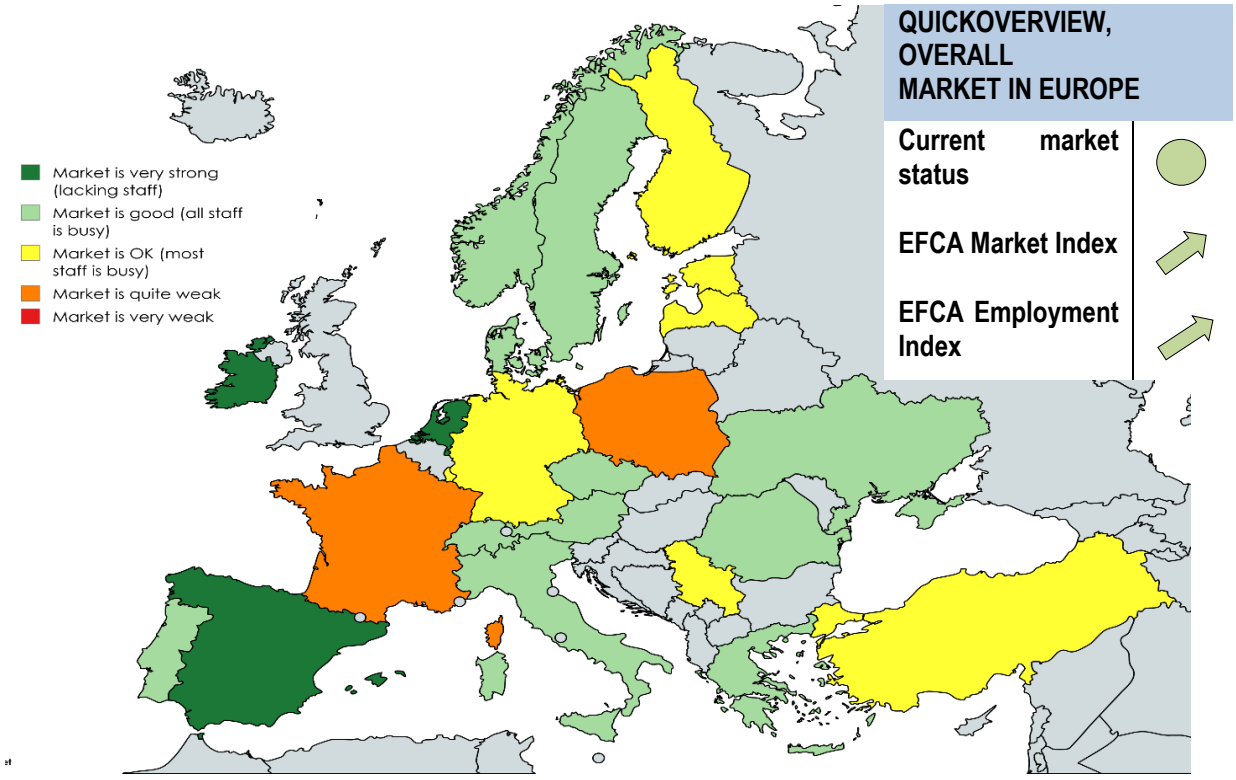
Average order stock across Europe is at 10.2 months, a strong level, very close to the post-pandemic peak. Most countries expect no major changes in order stock over the coming period.

Turnover development remains positive, with nearly half of the countries expecting increases in the next six months and the rest anticipating stability.

Profitability across Europe remains solid. At 7 percent in 2024, it continues to exceed the long-term average. Most countries report stable margins, with a few forecasting modest improvements.

The survey was conducted during October–November 2025. 23 EFCA member associations responded (85%).

Current state of European Markets EFCA Survey Autumn 2025

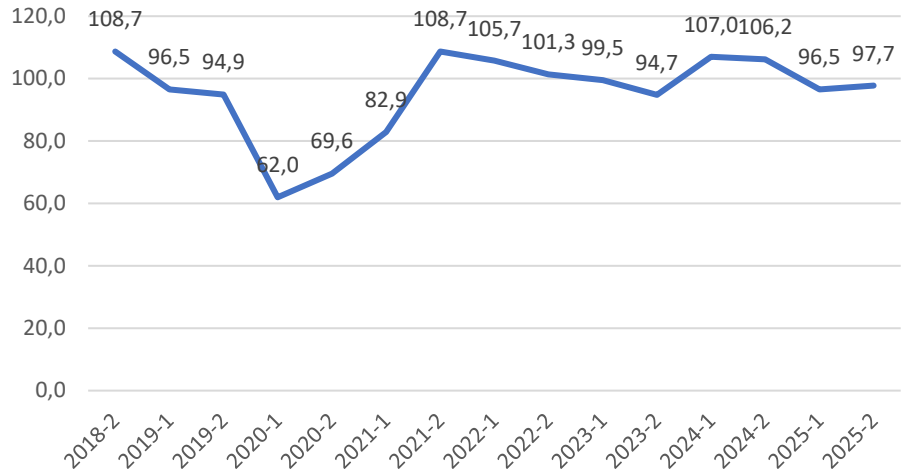


EFCA Economic Environment Committee, Autumn 2025

Market development

EFCA Market Index, Autumn 2018 – Autumn 2025

2018-1 = 100 (see appendix, definitions).

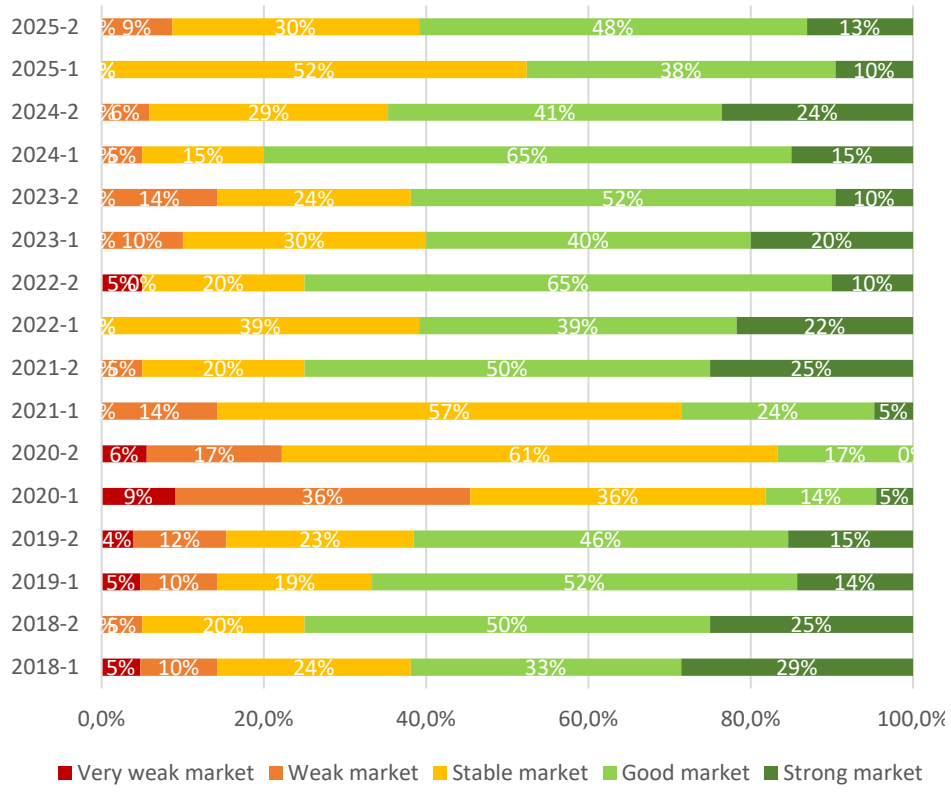


The EFCA Market Index shows the overall development of the European markets.

The markets reached a distinct peak in 2021, coinciding with the end of the COVID-19 pandemic. This was followed by a steady but gradual downward trend.

This report indicated that following a strong rebound in 2024, followed by a decline in the previous semester, the market now appears to be moving upward again.

Market development by category in percent

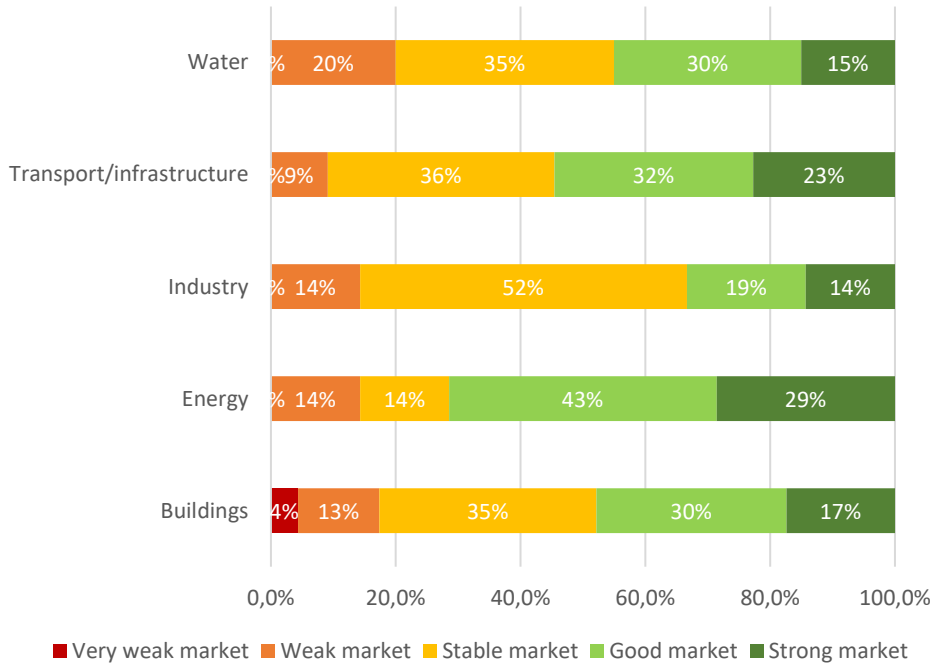


As shown in the previous graph, market development in the past six months has improved, now standing at 97.7 points.

The majority of participating countries currently report stable or better markets. There is a significant increase in the share of countries reporting good market conditions, rising from 38 percent to 48 percent.

The main drivers for market growth across Europe are transport/infrastructure, energy systems and the green transition of the energy sector, along with an increasing focus on security and defence.

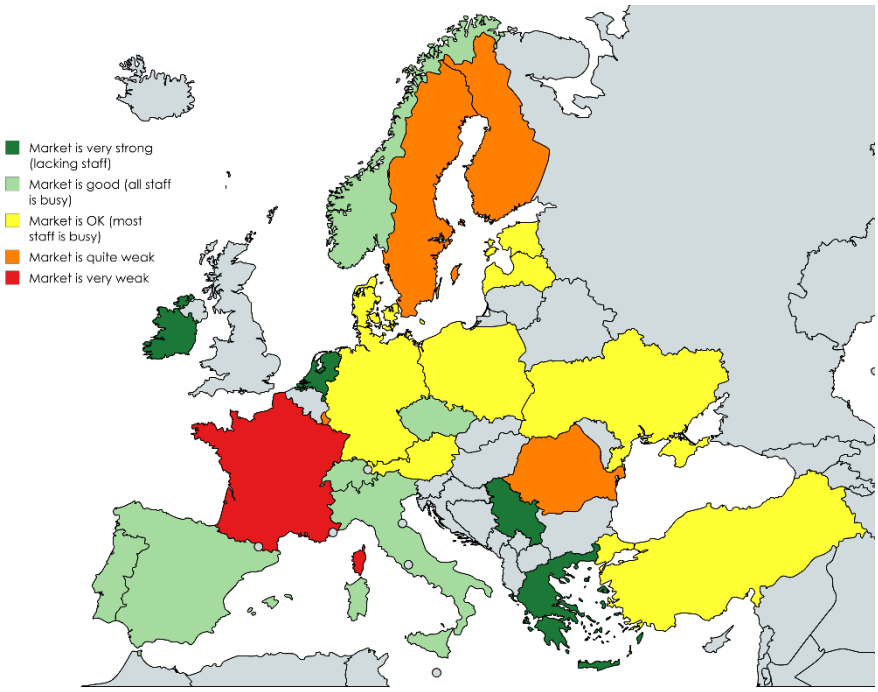
Market development by sectors in percent



Market conditions across all sectors remain at, or above, the stable level.

All five sectors currently report stable or better markets, with the Buildings sector showing particularly high shares of stable market responses, at 52% percent. The Energy and Transport/Infrastructure sectors show stronger momentum, with over 50 percent of responses indicating good or strong market conditions.

Market development by sector: Buildings

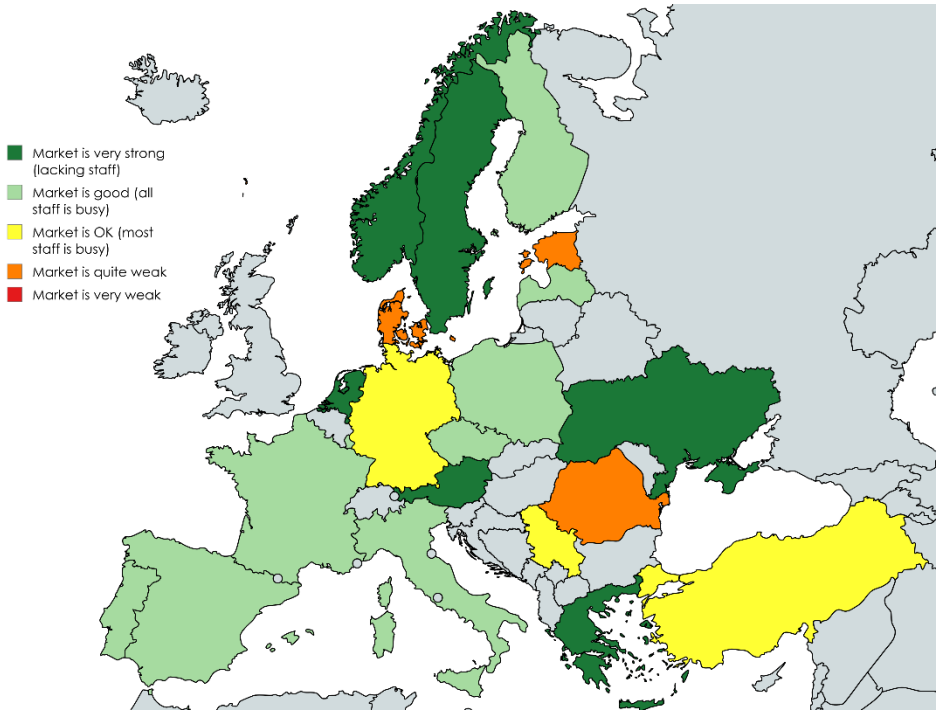


The graph illustrates market development in the building segment across Europe. Strong demand and staff shortages are evident in Greece, the Netherlands, Ireland and Serbia, indicating a very strong market segment.

Southern Europe shows healthy activity, experiencing good markets, while Central and Eastern Europe remain stable to moderate.

On the contrary, northern countries such as like Sweden, and Finland report weaker markets. France negatively stands out as the only country with a very weak market in this segment. Such differences highlight regional disparities in construction demand and workforce availability.

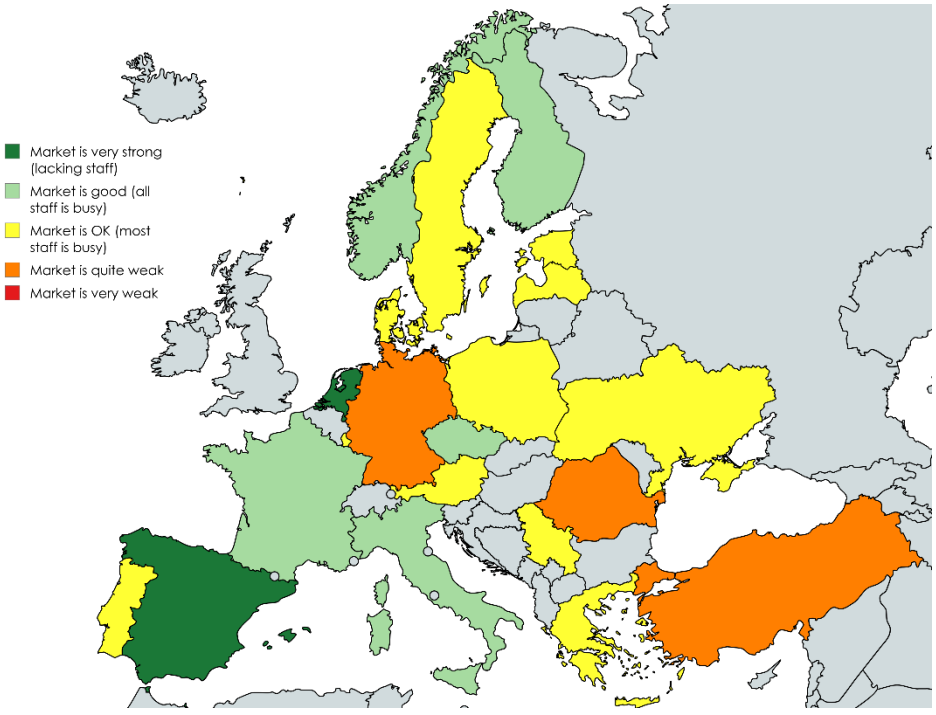
Market development by sector: Energy



The graph shows strong energy market development in much of Europe's peripheries. Western Europe reports strong market activity.

Only three countries (Denmark, Estonia and Romania) display weak markets, indicating overall high demand and significant workforce pressure across the European energy sector.

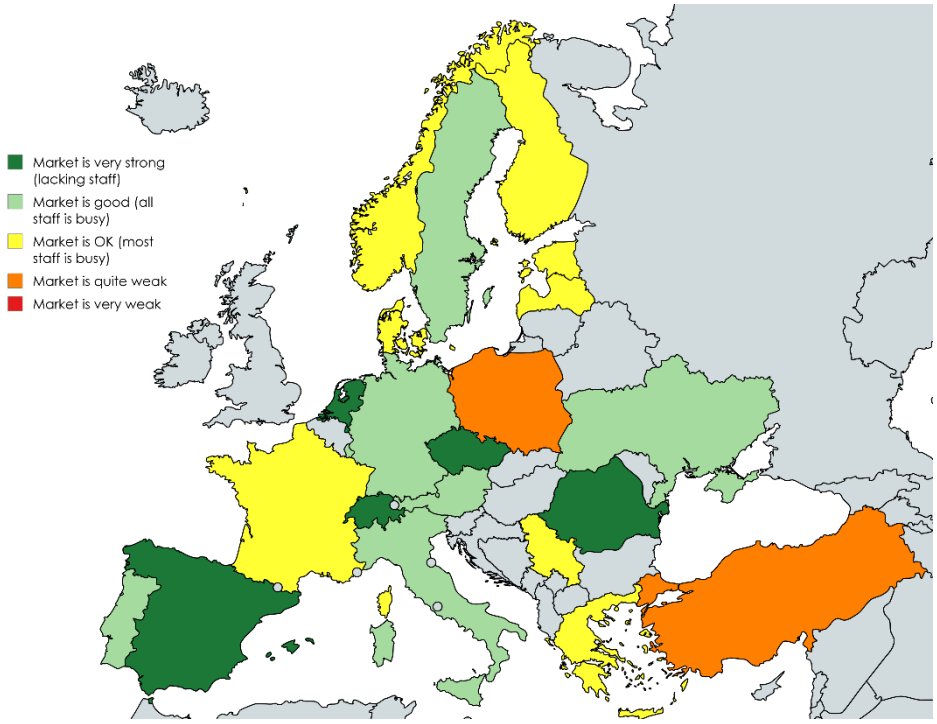
Market development by sector: Industry



The industrial market segment in Europe shows mixed development. The Netherlands and Spain lead with particularly strong markets and staff shortages.

In contrast, Germany, Romania and Türkiye face notably weak markets, alongside some moderate activity in Central Europe and the Balkans. The graph illustrates slightly uneven demand for consulting engineering services in the industrial market sector across the continent.

Market development by sector: Transport/Infrastructure

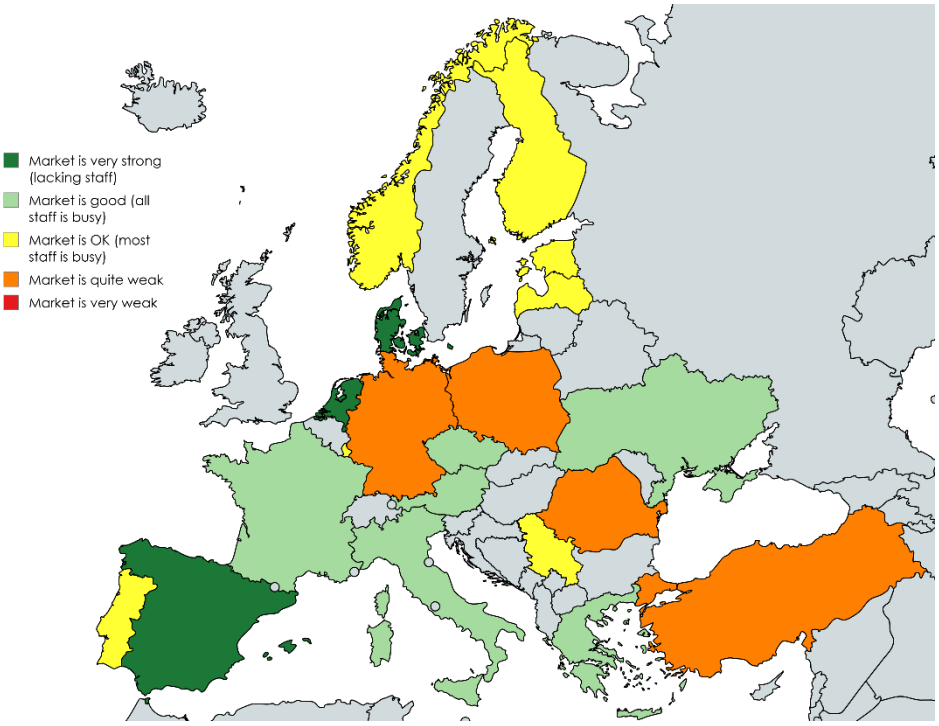


The transport/infrastructure market sector appears to be the strongest sector along with the energy sector. Czech Republic, the Netherlands Switzerland, Spain and Romania display very strong markets, indicating staff shortages due to high demand.

In contrast, Poland and Türkiye show relatively weaker markets, suggesting less activity in the infrastructure market, or a reduced demand compared to the past.

The rest of Europe reports moderate to good markets with staff fully utilised.

Market development by sector: Water



The water sector for consulting engineering services in Europe shows mixed development.

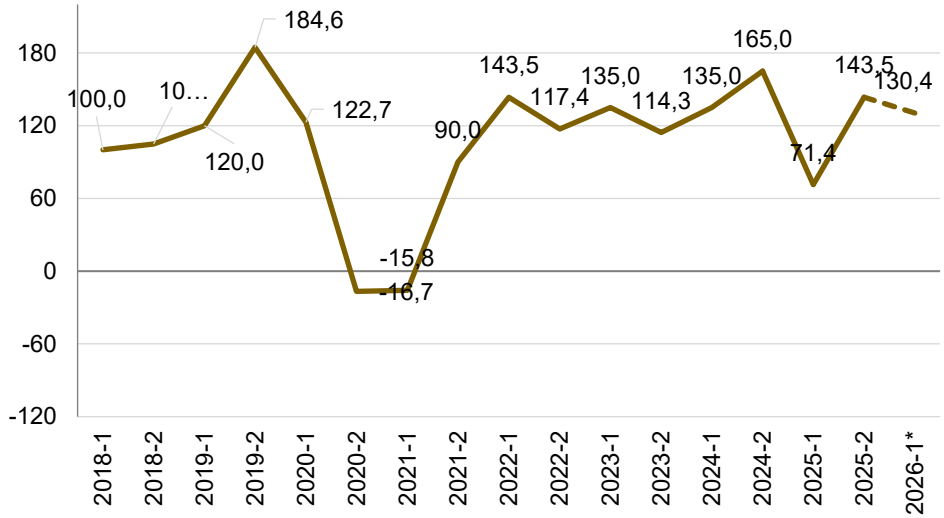
The Netherlands, Denmark, and Spain lead with very strong markets, while Western and Southern Europe generally perform well.

Germany, Poland, Romania, and Türkiye stand out with notably weaker markets, indicating challenges and lower demand.

Employment

EFCA Employment Index, spring 2018 – Autumn 2025

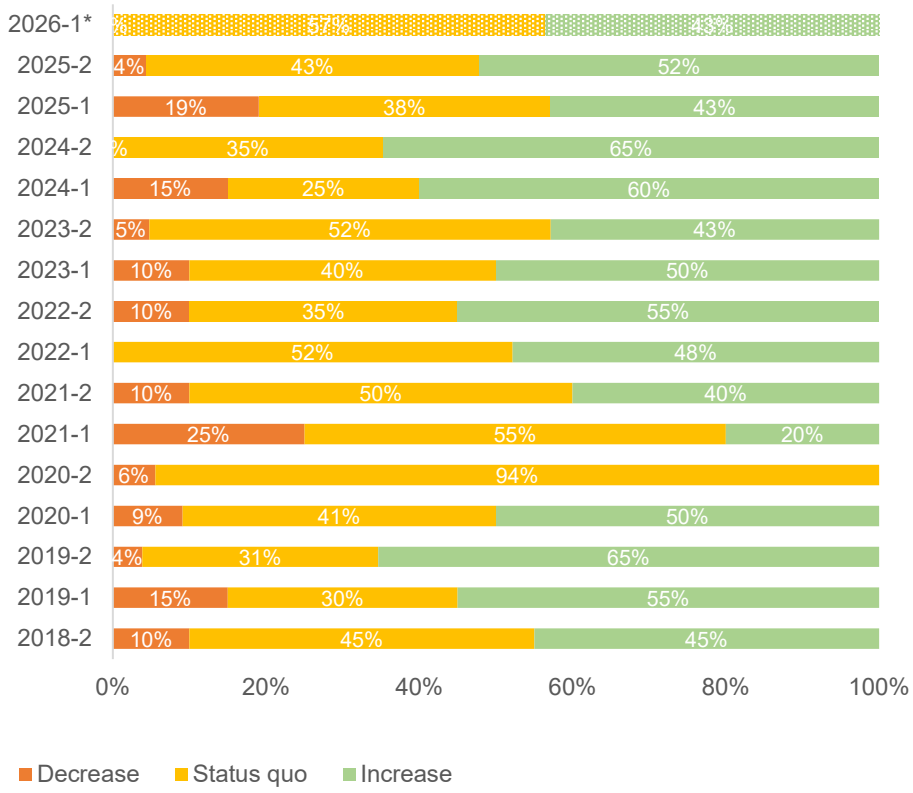
2018-1 = 100 (see appendix, definitions).



The EFCA Employment Index, after a positive upturn throughout 2024, followed by steep decline in the first half of 2025, is now strongly rebounding to 143,5 points. The forecast for the first half of 2026 though, is that the index will decrease to 130,4 points.

This rebound is driven by a shift from "growth markets" to "stable markets" as well as structural changes across the different market sectors, as seen in the previous section.

Staff development by category in percent (* = expected)

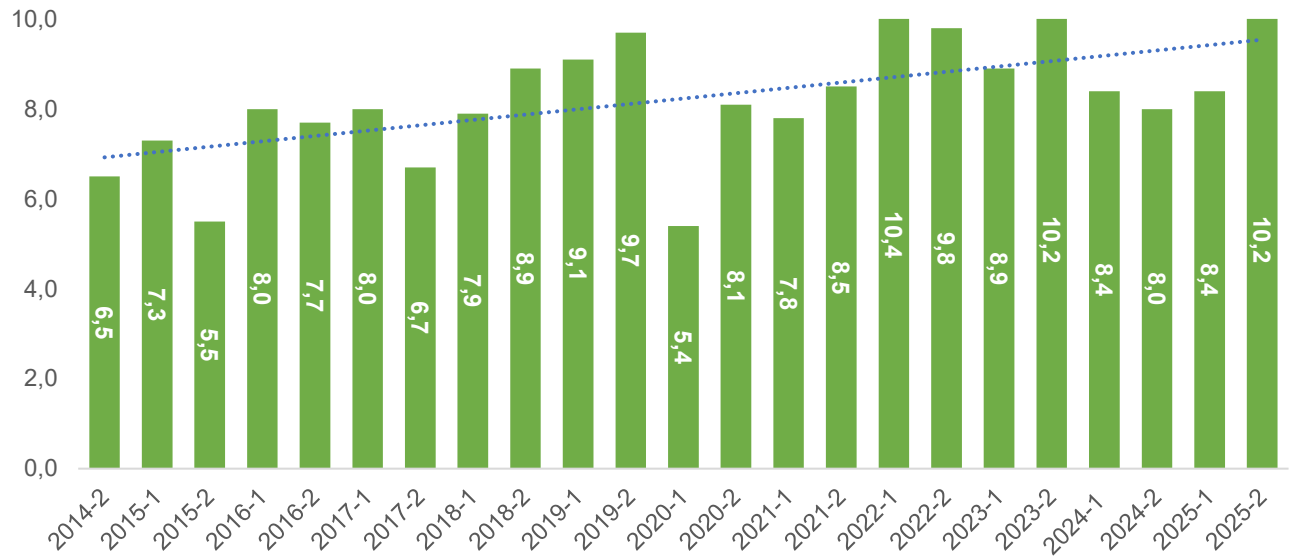


In the previous report, Spring 2025, around one in five EFCA Member Associations reported reduced need for staff in the coming period, and 43 percent reported increased staff development.

For this report, staff development has been significantly more positive. 52 percent of countries have seen an increase in staff. Expectations are that staff development will remain unchanged for around half of the countries, with just over 40 percent expected to increase their staff numbers.

Order stock

Average order stock in months, European average 2014-2025
The figure for average order stock in months is weighted according to market size, based on Eurostat figures (see appendix)

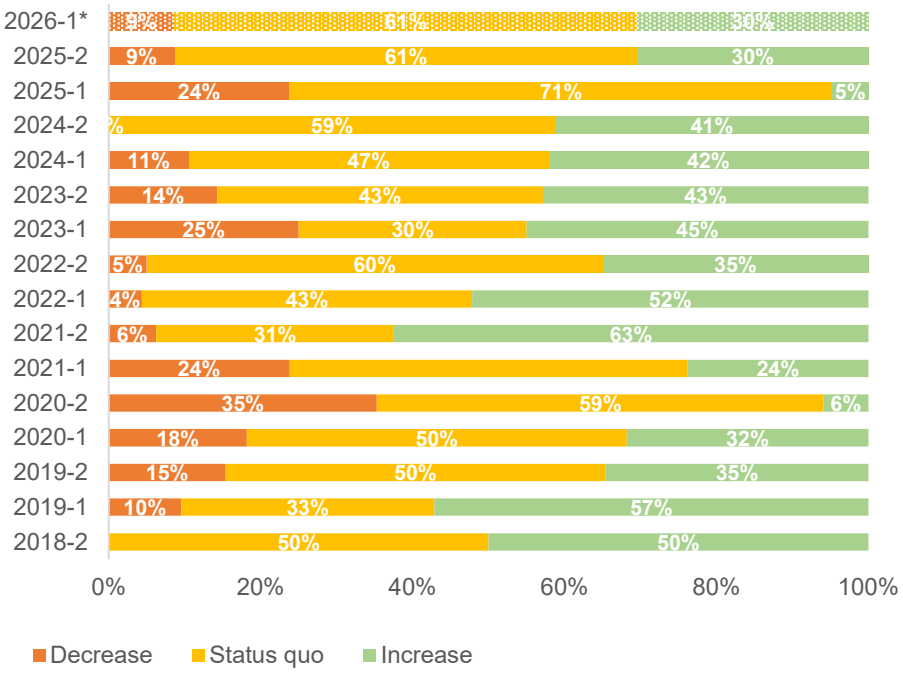


The order stock of European consultancies is at present still high at 10,2 months.

The current level of 10,2 months is a result of increased uncertainty in the markets as well as an effect of somewhat concerning staff levels in the European consultancies at large. There is a significant increase in the order backlog compared with previous semesters, with the figure now close to its previous peak of 10,4 months.

As shown in previous graphs, there is a mixed but generally positive momentum in the industry, and order stocks are expected to fluctuate in the coming periods. This appears to be a result of markets not yet having fully stabilised after the pandemic. It also needs to be noted that the trendline over the last 10 years shows a slow but steady upward trend.

Order stock development by category in percent (* = expected)

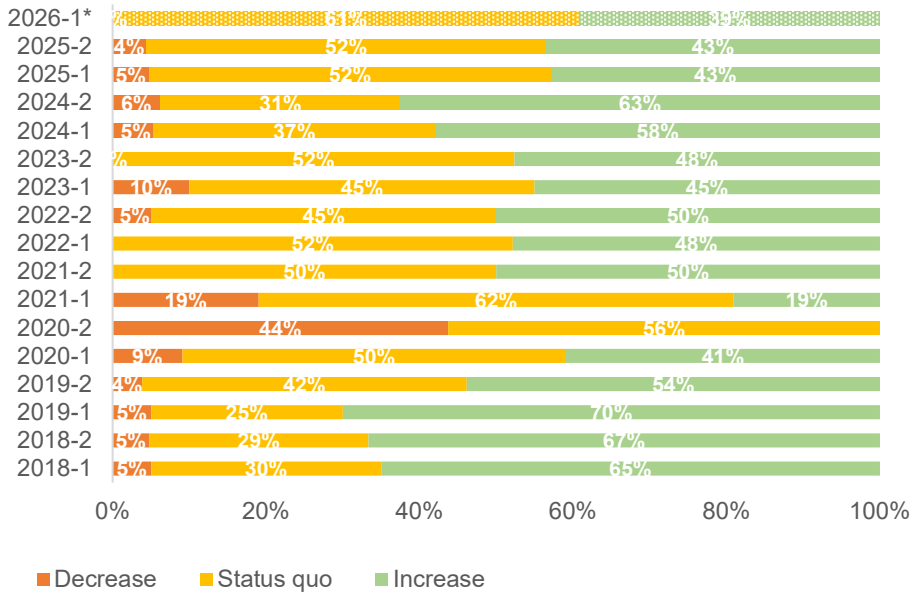


The expected order stock development in the coming six-month period can be described as neutral, with most countries (76%) expecting "no significant change" in order stock. It should however be noted that in only 9 percent of the countries, order stock is expected to fall in the near future.

The market's overall status is the main factor influencing order stock levels and their development.

Turnover

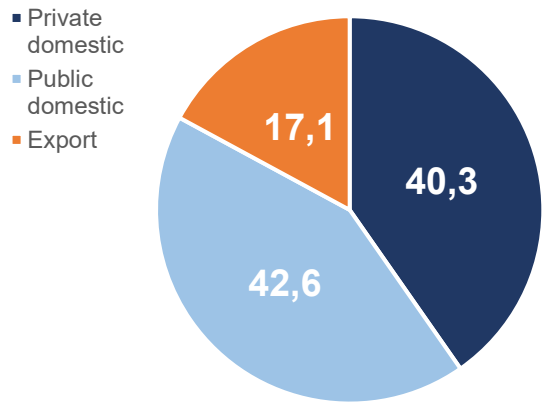
Turnover development by category in percent (* = expected)



The outlook for turnover development is still clearly positive. A little less than half of the countries expect turnover to increase over the coming six-month period, and only 10 percent expect a decrease.

With the exception of a short downturn during the pandemic in 2020-21, turnover in 90-100 percent of countries has remained stable or has increased since 2018.

Turnover by domestic (private/public) and export activity, European average, autumn 2025



Client* turnover distribution, top three participants, autumn 2025

Private domestic	Public domestic	Export
1 Netherlands (70%)	**1** Romania (80%)	**1** Spain (70%)
2 Sweden (63%)	**2** Latvia (65%)	**2** Türkiye (50%)
3 Finland (62%)	**2** Switzerland (60%)	**3** Serbia (43%)

*Note: The client (of the consultant) is registered as a private entity (such as a private EPC contractor) even if the project owner / source of finance is a public entity.

Turnover distribution remains relatively stable between domestic private and domestic public, as a European average the figures are at around 40 percent public domestic, 40 percent private domestic and 20 percent exports.

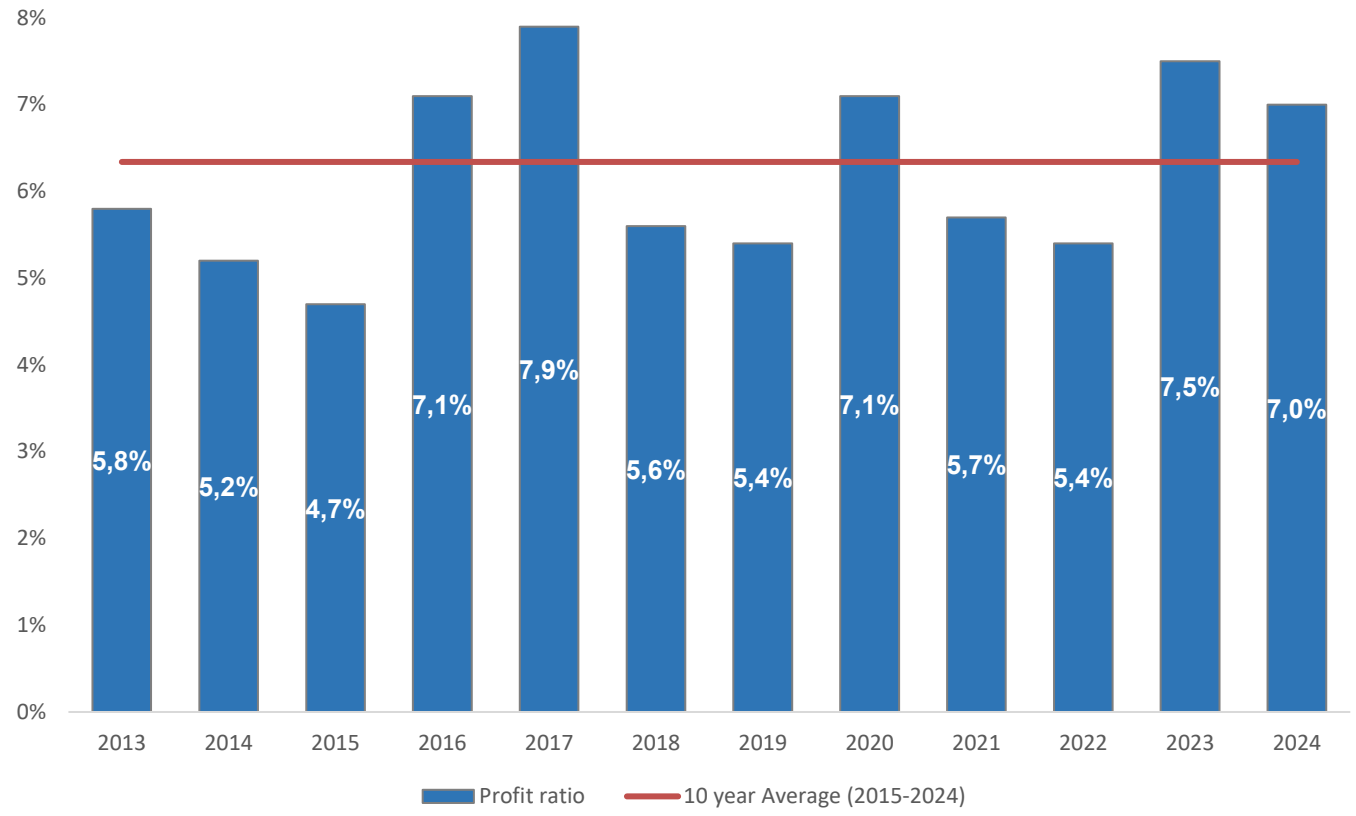
But there are significant differences between individual European countries. Countries with the highest levels of engineering service exports are Spain and Türkiye, both at 50 percent exports or higher – with Serbia following in the third place with 43 percent. Private domestic clients remain dominant in most countries in Northern and Western Europe.

Profitability

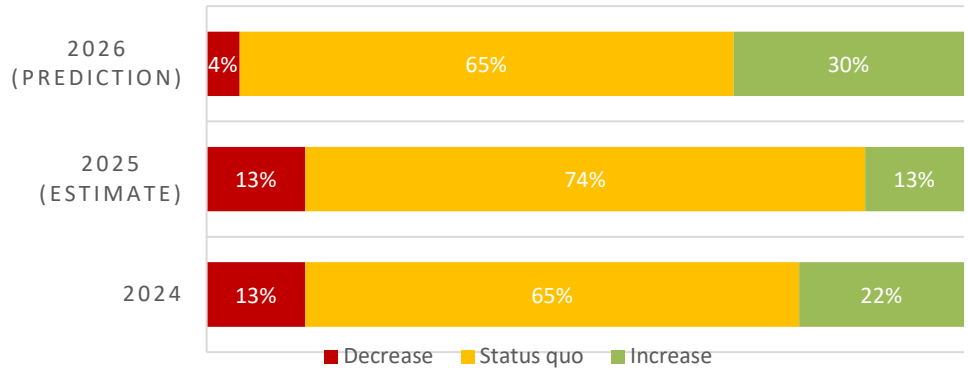
Profitability of European engineering firms has increased significantly from 5,4 percent in 2022 to 7,5 percent in 2023, with a minor decrease to 7,0 for 2024. The average level from 2013-2024 is 6,2 percent, which means that despite the minor decrease compared to 2023, a profitability level of 7,2 percent still represents a figure significantly higher than the long-term average. The fact that order stock was high in 2022-2023 and staff shortages were substantial, may have driven up earnings and hourly fees, despite inflation and increasing labour costs.

Profit ratio (EBITDA). European average, 2013-2024

The figure for Profit ratio (EBITDA), is weighted according to market size, based on Eurostat figures (see appendix)



Profitability development by category in percent (* = expected)



Profitability for 2024 increased in 22 percent of the countries. At the industry level, profitability in 2025 is estimated to grow in 13 percent of the countries and remain approximately unchanged in around three quarters of the countries. It should be noted that 13 percent of countries expect profitability to decline.

Challenges

Staff shortage is still the top challenge for the European engineering consultancies – as it has been the case since 2021.

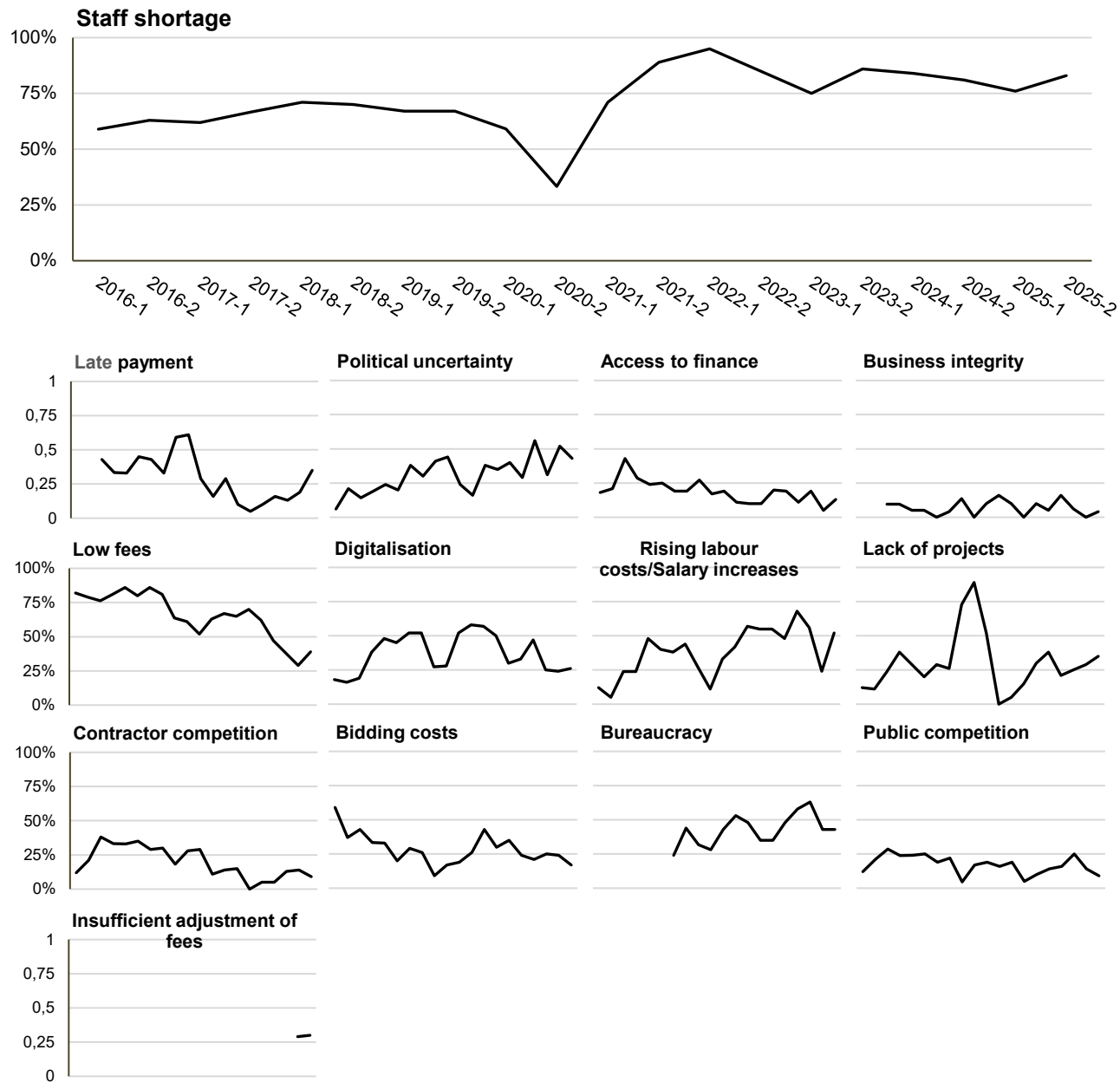
Rising labour costs have jumped five places as the second most important challenge while bureaucracy (red tape), along with political uncertainty remain at the top three challenges.

Low fees is also a challenge but it appears, that with low fees we see a long-term falling trend. It is less of a challenge, than it was in the past. Finally, lack of projects and late payments appear within the top ten challenges as well.

Top 3 challenges faced by European companies

Challenge	Rank	Change
Staff shortage	1	-
Rising labour costs/Salary increases	2	+5
Bureaucracy	3	0
Political uncertainty	3	-1

Main challenges faced by European companies over time, 2022-2025



Country Overview (Autumn 2025)

Austria, ACA			
Market		Good	
Staff		→	→
Order stock	14	→	→
Turnover		→	→
Domestic/Public/Export	33	34	33
Profit ratio (EBITDA)	6	N/A	N/A

Belgium, ORI			
Market		OK	
Staff		→	→
Order stock	N/A	→	→
Turnover		→	→
Domestic/Public/Export	40	40	20
Profit ratio (EBITDA)	10	→	→

Bulgaria, BACEA			
Market		OK	
Staff		→	↘
Order stock	6,0	↘	↘
Turnover		→	↘
Domestic/Public/Export	42	42	16
Profit ratio (EBITDA)	5	↘	↘

Czech Republic, CACE			
Market		Good	
Staff		→	→
Order stock	8,0	→	→
Turnover		→	→
Domestic/Public/Export	42	49	9
Profit ratio (EBITDA)	5	→	→

Denmark, FRI			
Market		Good	
Staff		↗	→
Order stock	6,3	↘	→
Turnover		↗	→
Domestic/Public/Export	49	36	15
Profit ratio (EBITDA)	8	→	→

Estonia, EAACEC			
Market		OK	
Staff		↗	↗
Order stock	5,0	→	↗
Turnover		→	↗
Domestic/Public/Export	50	45	5
Profit ratio (EBITDA)	6,0	→	↗

Finland, SKOL			
Market		OK	
Staff		↗	↗
Order stock	6,1	↗	↗
Turnover		→	→
Domestic/Public/Export	62	31	7
Profit ratio (EBITDA)	4	→	↗

France, Syntec / Cinov*			
Market		Weak	
Staff		→	→
Order stock	13,0	↘	↘
Turnover		→	→
Domestic/Public/Export	35	25	40
Profit ratio (EBITDA)	5,0	↘	→

Germany, VBI			
Market		OK	
Staff		→	↗
Order stock	11,2	→	→
Turnover		→	→
Domestic/Public/Export	62	36	2
Profit ratio (EBITDA)	8,0	↘	→

Greece. Hellasco			
Market		Good	
Staff		→	→
Order stock	4,5	→	→
Turnover		→	→
Domestic/Public/Export	40	45	15
Profit ratio (EBITDA)	10,0	↗	→

Hungary, AHCEA			
Market			
Staff			
Order stock			
Turnover			
Domestic/Public/Export			
Profit ratio (EBITDA)			

Ireland, ACEI			
Market		Strong	
Staff		→	↗
Order stock	11,0	↗	↗
Turnover		↗	↗
Domestic/Public/Export	38	49	13
Profit ratio (EBITDA)	9,0	→	↗

Italy, OICE			
Market		Good	
Staff		↗	→
Order stock	12	↗	↗
Turnover		↗	↗
Domestic/Public/Export	40	30	40
Profit ratio (EBITDA)		↗	↗

Latvia, LIKA			
Market		OK	
Staff		→	→
Order stock	6	→	→
Turnover		→	↗
Domestic/Public/Export	30	65	5
Profit ratio (EBITDA)	10	→	↗

Luxemburg, OAI			
Market		OK	
Staff		↗	↗
Order stock	11,0	→	→
Turnover		↗	→
Domestic/Public/Export	53	42	5
Profit ratio (EBITDA)	6,0	→	→

Macedonia, ACEMA			
Market			
Staff			
Order stock			
Turnover			
Domestic/Public/Export			
Profit ratio (EBITDA)			

Norway, RIF			
Market		Good	
Staff		↗	↗
Order stock	14,0	→	↗
Turnover		↗	↗
Domestic/Public/Export	33	34	33
Profit ratio (EBITDA)	7,0	→	→

Poland, SIDIR			
Market		Weak	
Staff		→	→
Order stock	6	→	→
Turnover		↗	→
Domestic/Public/Export	56	32	12
Profit ratio (EBITDA)	10	→	↗

Portugal, APPC (spring 2024)			
Market		Good	
Staff		→	→
Order stock	6	↗	↗
Turnover		→	↗
Domestic/Public/Export	20	80	0
Profit ratio (EBITDA)	5	→	→

Romania, ARIC			
Market		Good	
Staff		↗	↗
Order stock	6,0	→	↗
Turnover		↗	↗
Domestic/Public/Export	15	80	5
Profit ratio (EBITDA)	5,0	→	→

Russia, NACEC **			
Market			
Staff			
Order stock			
Turnover			
Domestic/Public/Export			
Profit ratio (EBITDA)			

Serbia, ACES			
Market		OK	
Staff		↗	→
Order stock	16	→	↗
Turnover		→	↗
Domestic/Public/Export	56	1	43
Profit ratio (EBITDA)	15	→	→

Slovenia, NACES			
Market			
Staff			
Order stock			
Turnover			
Domestic/Public/Export			
Profit ratio (EBITDA)			

Spain, TECNIBERIA			
Market		Strong	
Staff		↗	→
Order stock	13,7	↗	→
Turnover		↗	→
Domestic/Public/Export	15	15	70
Profit ratio (EBITDA)	7,0	↗	→

Sweden, FSIC			
Market		Good	
Staff		↗	↗
Order stock	8,0	→	↘
Turnover		↗	↗
Domestic/Public/Export	63	32	5
Profit ratio (EBITDA)	4,0	→	↗

Switzerland, suisse.ing (autumn 2024)			
Market		Good	
Staff		↗	↗
Order stock	6	→	→
Turnover		↗	↗
Domestic/Public/Export	30	60	10
Profit ratio (EBITDA)	6	→	→

The Netherlands, NLingenieurs			
Market		Strong	
Staff		↘	→
Order stock	6,5	→	→
Turnover		→	→
Domestic/Public/Export	70	30	0
Profit ratio (EBITDA)	9	→	→

Türkiye, ATCEA			
Market		OK	
Staff		→	→
Order stock	9,3	→	→
Turnover		→	→
Domestic/Public/Export	20	30	50
Profit ratio (EBITDA)	5,0	→	

Ukraine, ICEG			
Market		OK	
Staff	3	↗	↗
Order stock		↗	→
Turnover		↘	→
Domestic/Public/Export	10	50	40
Profit ratio (EBITDA)	4	↗	→

United Kingdom, ACE ***			
Market			
Staff			
Order stock			
Turnover			
Domestic/Public/Export			
Profit ratio (EBITDA)			

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Overview Guide

Each collum represents a different set of data.
Market: Represents the current state of the market
Staff: Arrow 1 represents the development for the past six months and arrow 2 represents the expectations for the next six months.
Order stock: Column 1 represents the current order stock measured in months, arrow 1 represents the development for the past six months and arrow 2 represents the expectations for the next six months.
Turnover: Arrow 1 represents the development for the past six months and arrow 2 represents the expectations for the next six months
Domestic/Public/Export: These columns represent the percentage of turnover split in domestic private / domestic public and Export.
Profit ratio: Most recent profit (EBITDA) arrow 1 represents the development for the past six months and arrow 2 represents the expectations for the next six months

Appendix – Autumn 2025 Economic Forecast

The appendix carries information from the European Commission, which is of interest for the consulting engineering industry, when reviewing market trends as well as the Eurostat figures that are used for calculating European averages in the EFCA Barometer.

Autumn 2025 Economic Forecast

The EU economy is expected to remain on a moderate growth path despite a challenging external environment. Real GDP is projected to grow by 1.4 % in the EU for both 2025 and 2026, and edge up to 1.5 % in 2027. In the euro area, growth is forecast at 1.3 % in 2025, slowing modestly to 1.2 % in 2026, before rebounding to 1.4 % in 2027.

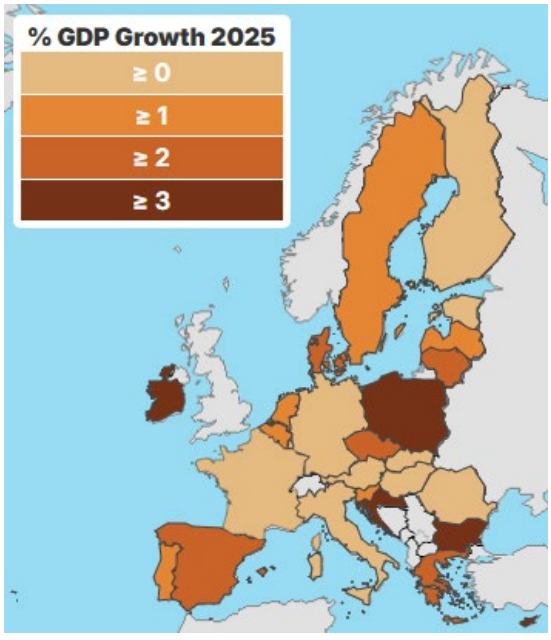
Inflation is expected to continue easing. In the euro area, headline inflation is projected at 2.1 % in 2025, falling to 1.9 % in 2026 and then rising slightly to 2.0 % in 2027. For the EU as a whole, inflation is forecast at 2.5 % in 2025, decreasing to 2.1 % in 2026 and ticking up to 2.2 % in 2027. Consumption remains a pillar of growth. Private consumption is forecast to support GDP with a steady growth rate of 1.5 % annually over the forecast horizon, helped by a gradual decline in the saving rate (projected to fall to 14.4 % by 2027). Public consumption is expected to slow, as growth in public wages and intermediate consumption decelerates.

On the labour market, the unemployment rate in the EU is expected to stay at 5.9 % in 2025 and 2026, before slightly declining to 5.8 % in 2027. In the euro area, the rate is projected to fall from 6.3 % in 2025 to 6.2 % in 2026 and 6.1 % in 2027. Employment is predicted to grow modestly by about 0.5 % in both 2025 and 2026, then slow to 0.4 % in 2027.

Investment is upgraded in this forecast: gross fixed capital formation (GFCF) is expected to grow 2.0 % in 2025, rising to 2.6 % in 2026, driven by stronger equipment investment (especially in Germany) and increased use of EU Recovery and Resilience Facility funds. Construction investment, however, is expected to take longer to pick up.

Fiscal outlook shows a widening deficit. The EU's general government deficit is projected to rise to –3.3 % of GDP in both 2025 and 2026, increasing further to –3.4 % in 2027. In the euro area, the deficit is forecast to go from –3.2% in 2025 to –3.4% by 2027. The debt-to-GDP ratio is expected to climb: in the EU, from around 82% in 2024 to 85% in 2027; in the euro zone, from 88% to 91% in the same period.

Risks and uncertainties remain significant. The forecast assumes that the higher US tariffs (headline rate of 15%, with some exemptions) announced in a joint US–EU framework will remain in place, but that uncertainty around trade policy continues to weigh on EU export prospects. Other risks include geopolitical tensions (e.g., Russia-Ukraine war), volatility in financial markets, and the strong euro hurting export competitiveness. On the upside, structural reforms, higher defence-related investment in Europe, and new trade agreements could support growth more than anticipated.



The Autumn 2025 forecast paints a picture of resilient growth: despite elevated trade policy uncertainty and geopolitical risks, the EU economy is expected to sustain moderate GDP growth, temper inflation closer to target levels, and maintain a tight labour market. At the same time, fiscal pressures are rising, and the outlook remains vulnerable to both external shocks and shifts in global trade dynamics.

Source: https://economy-finance.ec.europa.eu/economic-forecast-and-surveys/economic-forecasts/autumn-2025-economic-forecast-shows-continued-growth-despite-challenging-environment_en

Eurostat figures

For calculations of European averages, the figures for each country are weighted by the FTE-numbers provided by Eurostat. The Eurostat figures may not always correspond exactly with the actual numbers of employees in each country, since they are based on NACE industry codes that can sometime inflate or deflate the size of the market depending on how accurately companies are coded. But they give an idea of the comparative size of each national market, and they are consistent.

Employees in FTE (Full Time Equivalent units)

Employees in full time equivalent units	2017**
Austria	40.146
Belgium	31.110
Bulgaria	14.182
Croatia	21.196
Czech Republic	51.497
Denmark	41.008
Estonia	5.745
Finland	38.753
France	308.495
Germany	565.113
Greece	15.377
Hungary	34.674
Ireland	25.348
Italy	63.158
Latvia	7.904
Lithuania	10.785
Luxembourg	6.412
Netherlands	96.500
North Macedonia	5.642
Norway	40.566
Poland	67.759
Portugal	32.267
Romania	63.230
Russia *	400.000
Serbia *	25.000
Slovakia	17.277
Slovenia *	9.000
Spain	175.888
Sweden	97.937
Switzerland	93.302
Türkiye *	50.000
Ukraine *	50.000
United Kingdom	442.472

* Figures are not available from Eurostat and have therefore been estimated.

** 2017 is the newest NACE code figures from Eurostat for FTE-numbers in the consulting engineering industry.

Definitions

EFCA: European Federation of engineering Consultancy Associations – the sole association for the engineering consultancy industry in Europe

EFCA Index: The indexes (EFCA Market Index and EFCA Employment Index) introduced to the survey in spring 2020, take the initial measurements (baseline: spring 2018) and transform them to 100 index points. Measurements from consecutive surveys are then transformed accordingly, in order to present the change in index points and/or percentage points compared to the baseline. For the spring 2025 Barometer report, the reported changes are the changes in index points.

ECB: European Central Bank

FTE: Full time equivalent. Number of staff/employees is defined as FTE, where the total number of hours worked by the staff in a company is divided by the equivalent of a full year's workload. *Example*: four half-time employees are counted as two employees according to the FTE-definition.

Order stock: The total work/assignments that the firm has agreed to do in the future.

Order stock in months: Order stock defined by what it represents in time for the firm. How much time, how many months, does the workload of the current order stock represent for the whole firm? *Example calculation:* The order stock is €1 million. The firm has 20 employees. The average yearly (12 months) turnover/employee is €100.000. The current order stock/employee is: €1 million/20 = €50.000/employee.

Order stock defined in months is: €50.000/€100.000 = 0.5 * 12 (months) = 6 months

Profit ratio/margin: Turnover divided by profit, measured as EBITDA (earnings before interest, taxes, depreciation, and amortization)

RRF: The European Recovery and Resilience Fund

Turnover: Total revenues/sales

General information: The data for the report is based on a survey of companies and organizations that are members of EFCA. The respondents' answers (companies and organizations) have been added up "by country". Unless otherwise noted, the charts in the report show the state of business in the EFCA countries. It should be noted that these data are not weighted based on the size of each country's engineering sector.

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