COMPETITOR ANALYSIS

KEY PARTICIPANTS IN THE CONSULTANCY SECTOR

There are approximately 150 management consultancy firms operating in Singapore employing 1,000 consultants. International consultants account for about 20-30% of the total. Similarly, there are more than 100 engineering consultancy firms and about 1,000 engineers. The majority here, however, are local firms.

The consulting arms of the major accounting firms dominate the market for financial/management accounting services.

The major firms offering human resource development and training are Roger Gill, Mercury Goldman, Hay Management Consultants and William & Mercer Fraser. The top general management consultants offering services in strategic planning, production/industrial and office management are Arthur D Little, Booz, Allen and Hamilton and SRI International. Other smaller management include Business International (the consulting arm of the London – based Economist Group) and Pacific Rim Consultants.

Frank Small and Associates and Survey Research Singapore are the major consultants for marketing management. Martin Van and Associates and Alexander Proudfoot are two firms offering consultancy in the industrial/manufacturing category.

Major consulting engineering firms offering services in structural/civil construction include local firms like Ranking Squire and Partners and KTP Ho and Partners and OVE Arup. Ewbank Peerce Engineers, J Rogers and United Projects Consultants are some of the larger mechanical/electrical consulting firms.

There are about 20 local firms and 12-15 foreign firms engaged in environmental consulting. These include the Singapore Institute of Standards and Industrial Research (SISIR), Chemitreat, Millipore and Camp, Dresser & Mackie. The majority of foreign environmental consulting firms are US-based. Canadian consulting firms tend to operate on a contract basis in Singapre. Contracts involving Canadian companies have included sectors such as oil and gas (eg. Dragon Pacific Consultans), the port (eg. Ganadian Hydrograhics), and Commercial Real Estate.

KEY CUSTOMERS IN SECTOR

The key customers for management consultants are large foreign and local multinational firms, SMEs and the government. The key customers for engineering consultants inlcude the government, condominium and real estate developers, and firms in the electronic, petrochemical and food sectors.