

**oice**

Associazione delle organizzazioni di ingegneria,  
di architettura e di consulenza tecnico-economica



Speaker

**Giorgia Gunnella**

OICE Board Member



# BUILDING THE FUTURE: INFRASTRUCTURE AND SUSTAINABILITY

Italian engineering companies prospective

Zagreb, May 21 2026

# About us

Created in 1965  
Member of FIDIC  
Founding member of EFCA  
Member of Confindustria



**450**  
Member  
companies



**€ 4.7 Bln**  
Overall yearly  
turnover



**35.000**  
Professionals



**30%**  
Revenues abroad

# Our mission



Promoting the culture  
of organised engineering



Providing services  
for members



Representing  
category interests



Promoting  
international activities

# Consultancy in the world



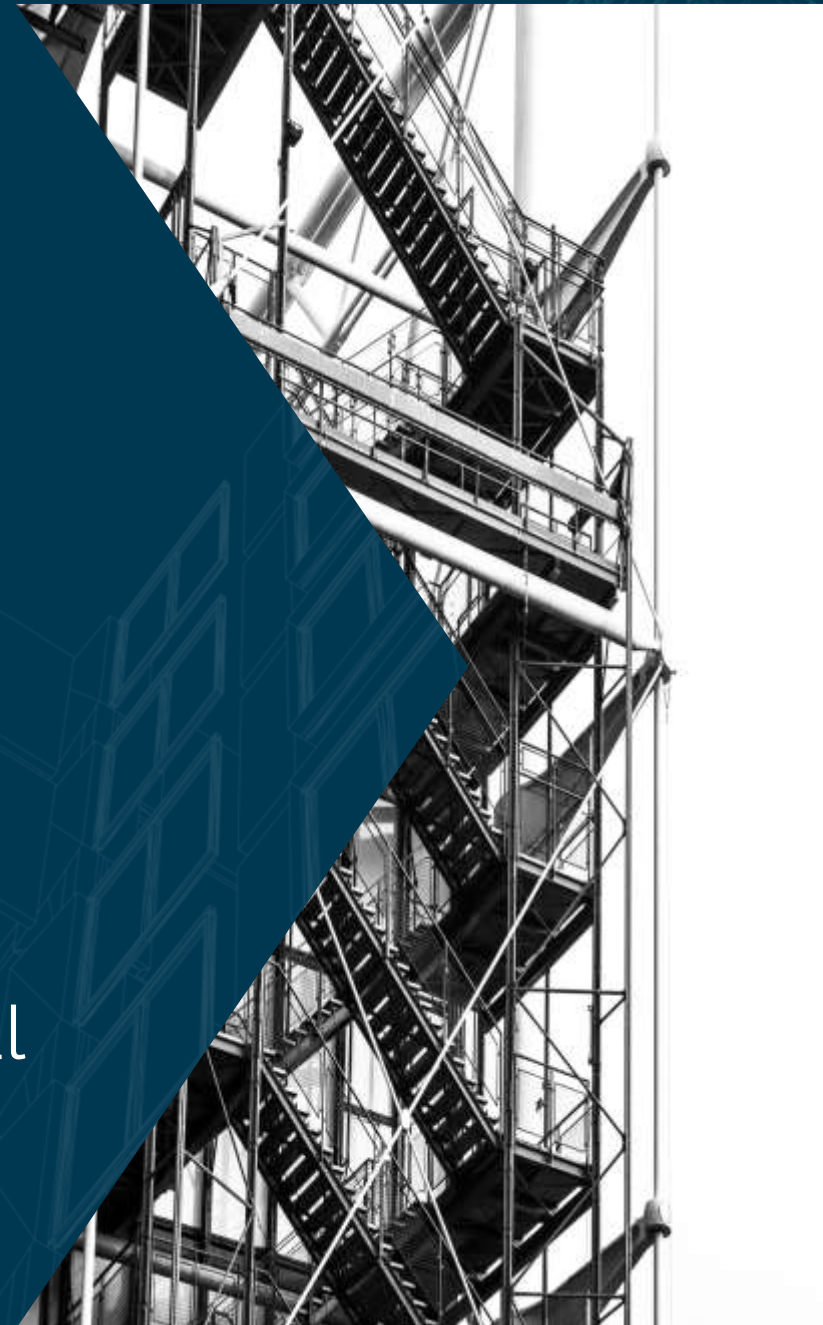
International revenues of the TOP 225 design firms for revenues abroad, in \$ billion.

- ✓ International revenues 2024: **\$89 billion**
- ✓ **Record revenue in 2024** for the decade 2015-2025
- ✓ **Middle East: + 30%**
- ✓ **USA: + 11%**
- ✓ **Africa: + 9%**



# Top Challenges

- 3**° Italy 3° in the world after USA and China for number of internationalised companies
- 2**° Italia 2° in Africa for its presence (6.9%) among European companies, slightly behind the French (7%)
- 1**° Middle East 1° market for international revenues of Italian companies, only preceded by France



Green and energy transition

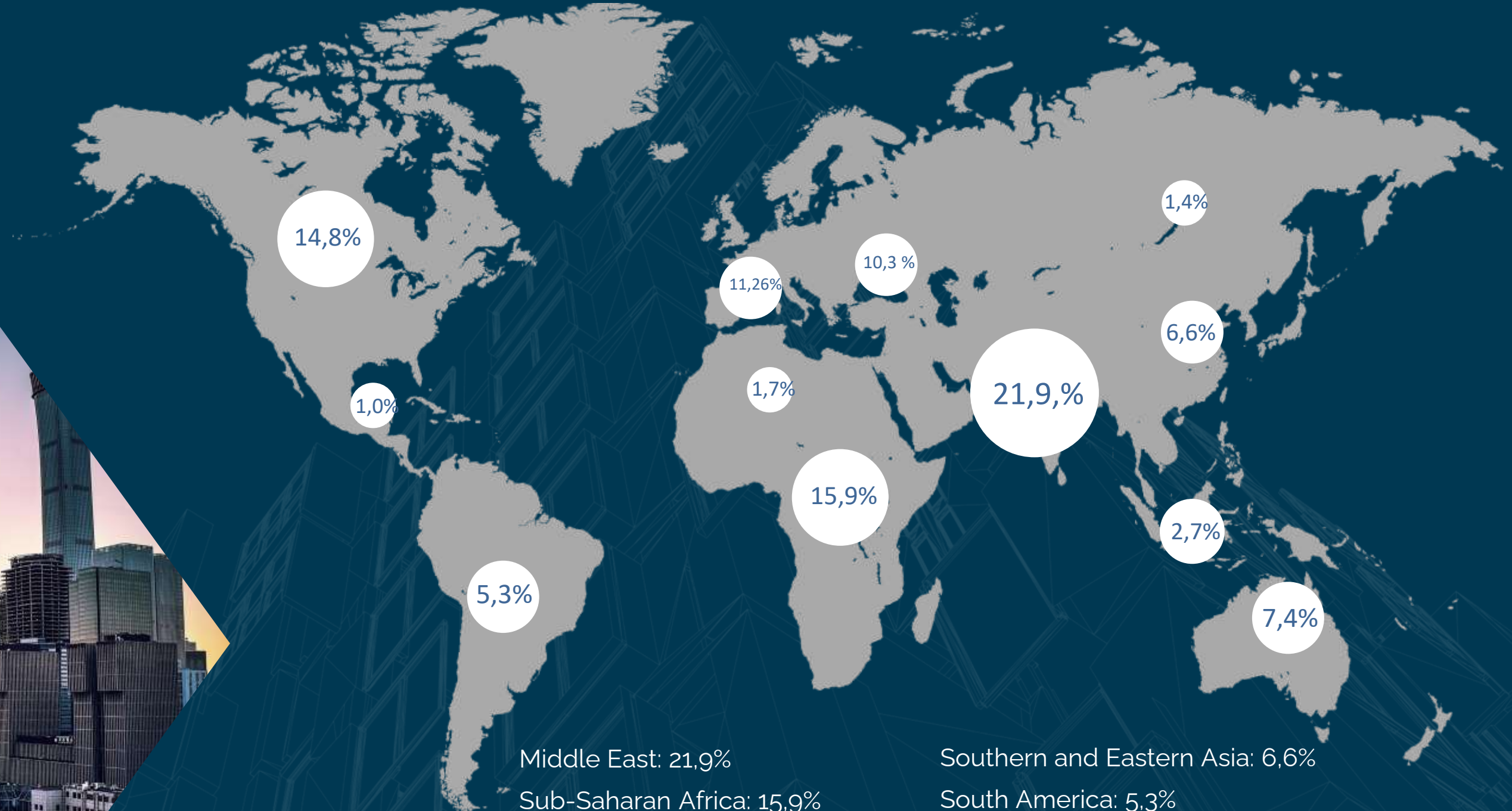
Climate change

Social inclusion  
and mobility

AI e digitalisation

Geopolitical complexity  
and market diversification

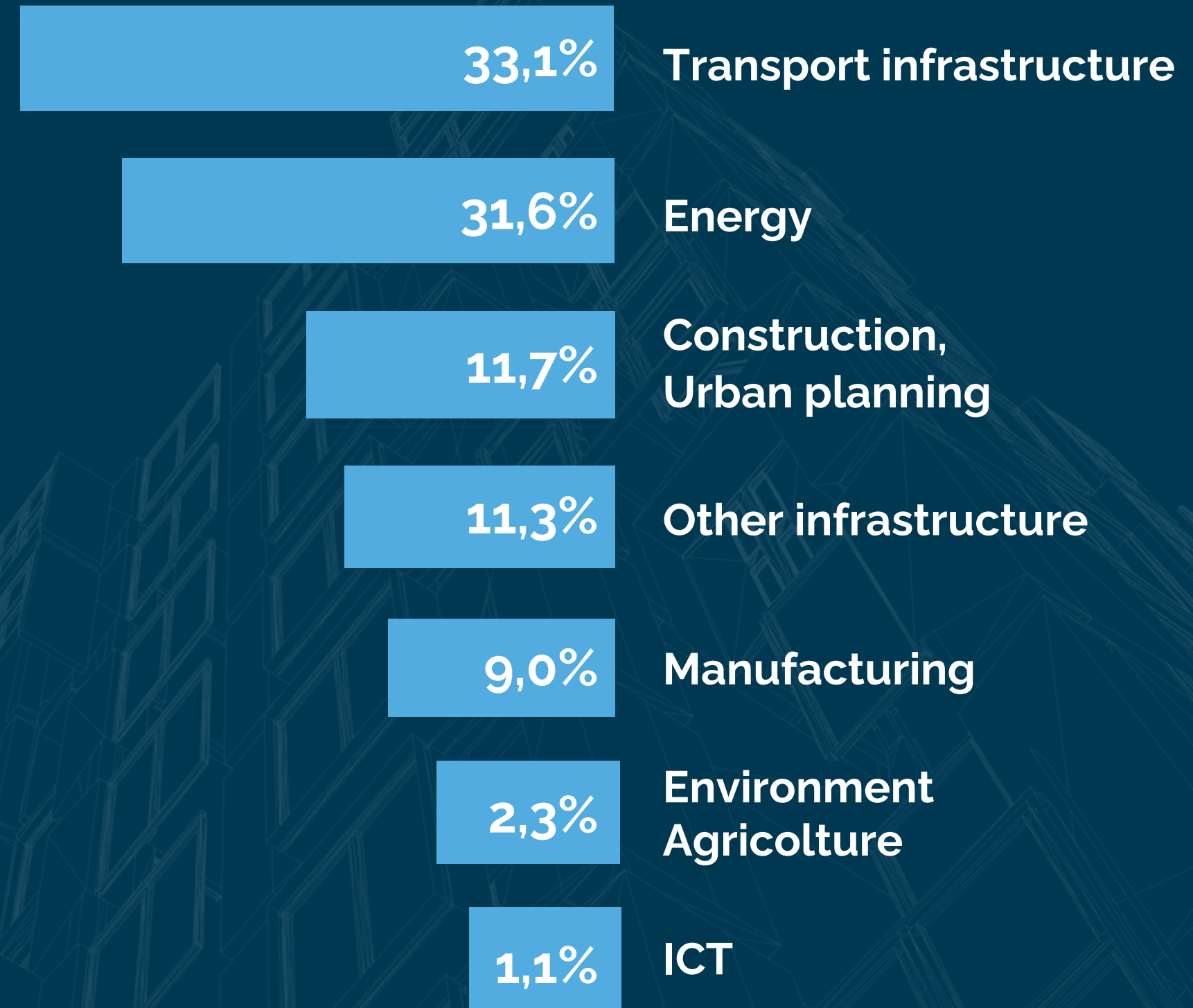
# OICE foreign production by region 2025



Middle East: 21,9%  
Sub-Saharan Africa: 15,9%  
North America: 14,8%  
EU: 11,2%  
Other European/Balkans: 10,3%  
Australia/Oceania: 7,4%

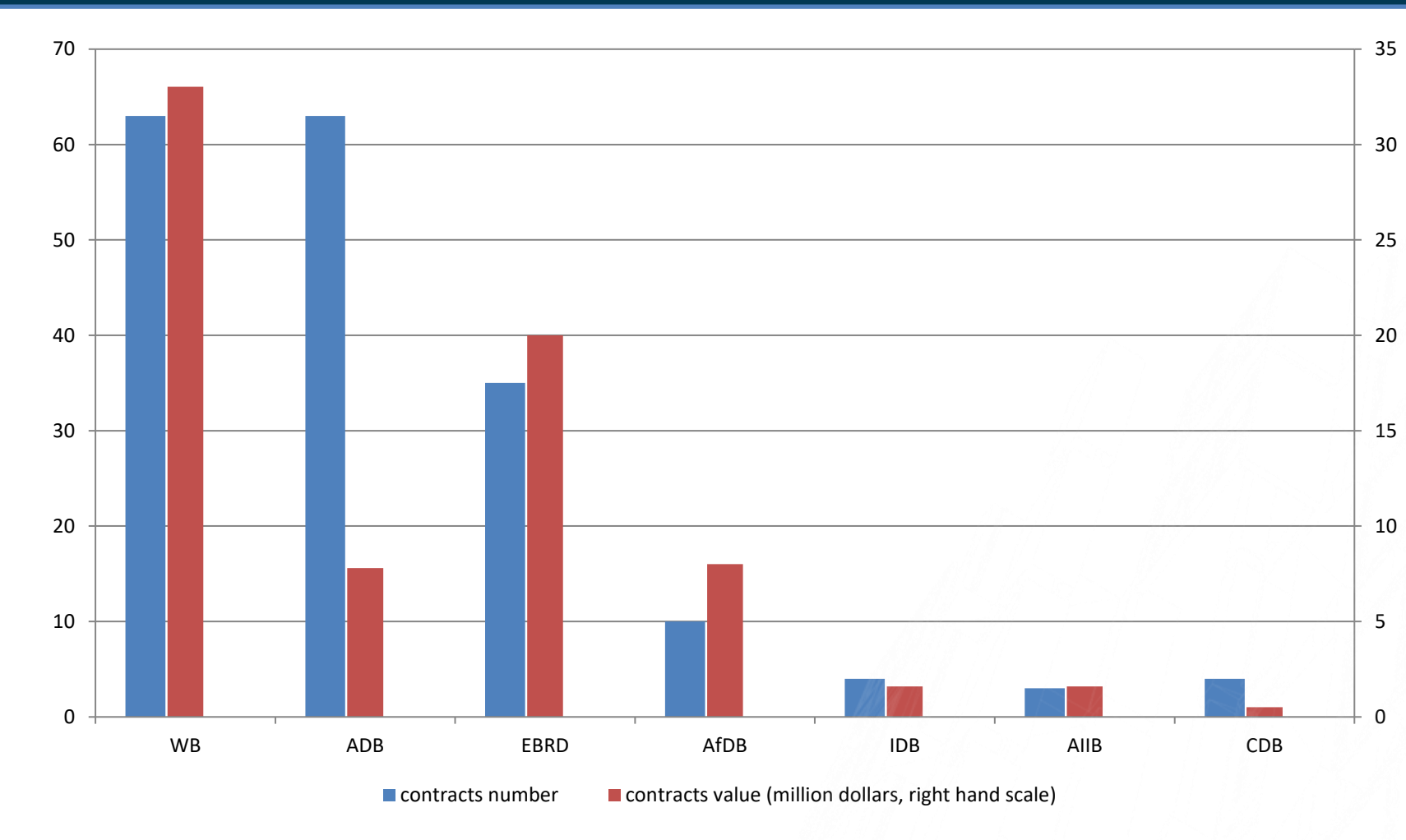
Southern and Eastern Asia: 6,6%  
South America: 5,3%  
ASEAN: 2,7%  
Mediterranean Africa: 1,7%  
Central Asia: 1,4%  
Central America: 1,0%

# OICE foreign production by market 2025

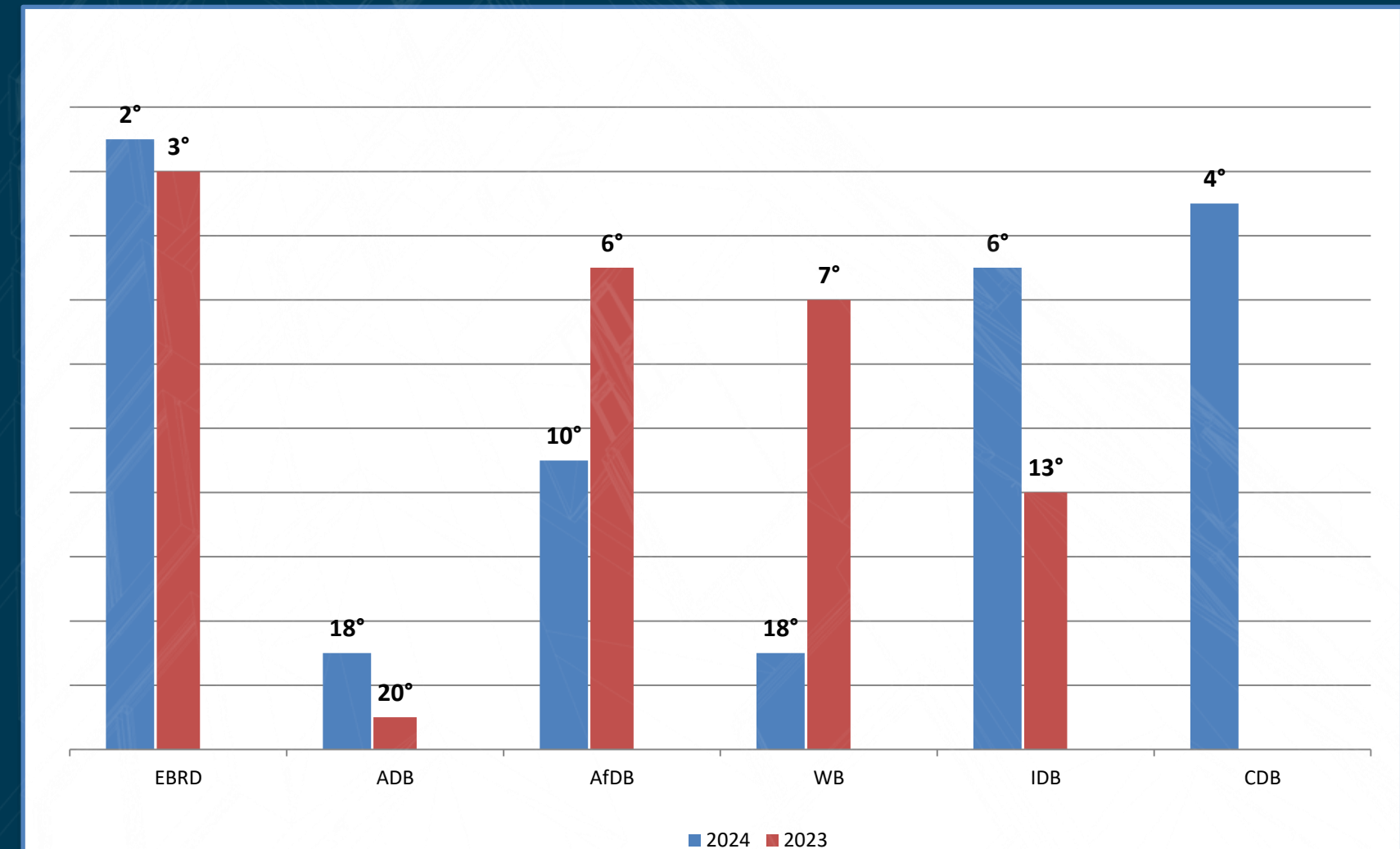


# An overview of Italy within the MDBs in 2024

## Number and value of consultancy contracts awarded to Italian consultants and consultancy companies, by bank



## Italian ranking within IFIs



Source: Elaboration on Italian Ministry of Economy and Finance data

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**Strong ties, shared  
opportunities for sustainable  
growth.**



**STRATEGIC PROXIMITY**  
Geographic, economic and  
trade integration between  
Italy and Croatia.



**STABLE MARKET ENVIRONMENT**  
Positive macroeconomic outlook  
and growing infrastructure  
opportunities.



**SHARED INFRASTRUCTURE VISION**  
Cross-border programs, IFIs  
procurement and regional  
connectivity.

**ITALY -> CROATIA**

Stronger together in Europe

**RAIL**

**CONNECTIVITY**

**PORTS & MARITIME**

**INFRASTRUCTURE**

**ENERGY**

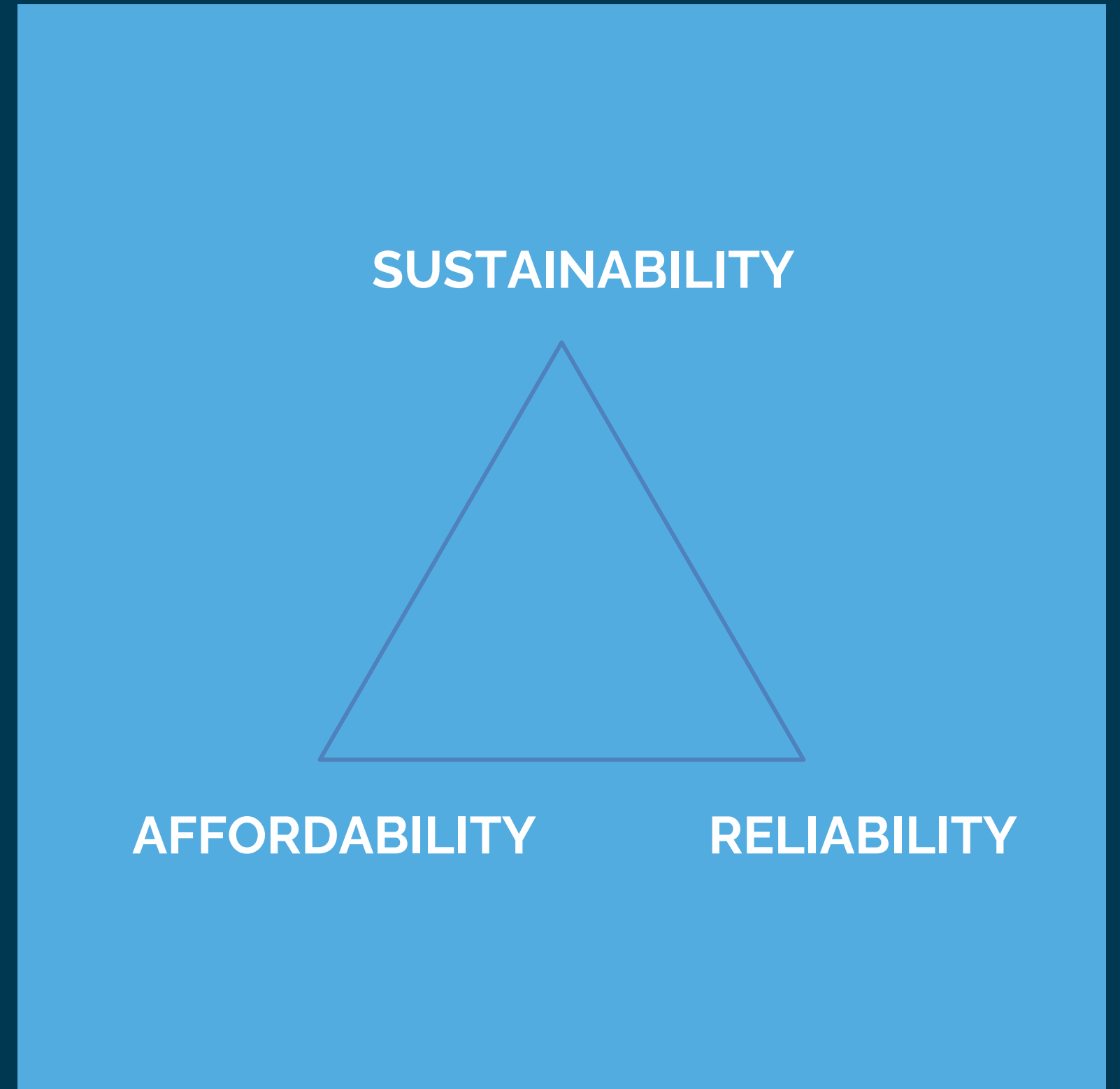
**TRANSITION**

**URBAN & SOCIAL**

**INFRASTRUCTURE**

# Reshaping infrastructures

A global transition aimed  
at achieving a positive  
climate impact.



# The role of engineering companies

Digitalisation and the future of construction

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Green materials and biodiversity

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Mitigation of environmental impact and pollution

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Maintenance of infrastructure



# Most sustainable transport infrastructures

## RAIL & METRO

Engineering integrated solutions for sustainable, affordable and reliable mobility.



# Rail Transport - added value

Increasing passenger and freight transport capacity

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Preventing and mitigating environmental impacts

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Reducing CO<sub>2</sub> emissions by 65% to 75% compared to road-based and air transport

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Lowering climate-related external costs, including road maintenance, noise and pollution



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# Metro - added value

Sustainability Standards for Energy Efficiency

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Implementation of transformers in line with EU  
Eco-Design Standards

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Integration of braking energy recovery systems

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Optimisation of train traffic to increase overall  
energy efficiency



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# Key words



Sustainability



Innovation



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# The big challenge

Combining integrated technological solutions and financial resources to support a sustainable, affordable and reliable transformation of infrastructure.



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