ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

GENERAL ASSEMBLY 1/09

Snapshot Survey
Of
Impact of Economic Crisis

ASSEMBLEE GENERALE 1/09

Economic Impact Survey **April-09**

Methodology:

- Secretariat Prepared Questions with Assistance from the EB
- The ACE Internet Service Provider Created Online Questionnaire
- E-mail Invitation sent to 3,100 E-mail Addresses of “Volunteers” from Sector Study
- Member Organisations Invited to Circulate the Invitation to all Architect Members
- Questionnaire Open for 2 Week Period (Ended 10th April)
- 2,066 Responses Received in Total
- 2,047 Responses from ACE Member Countries

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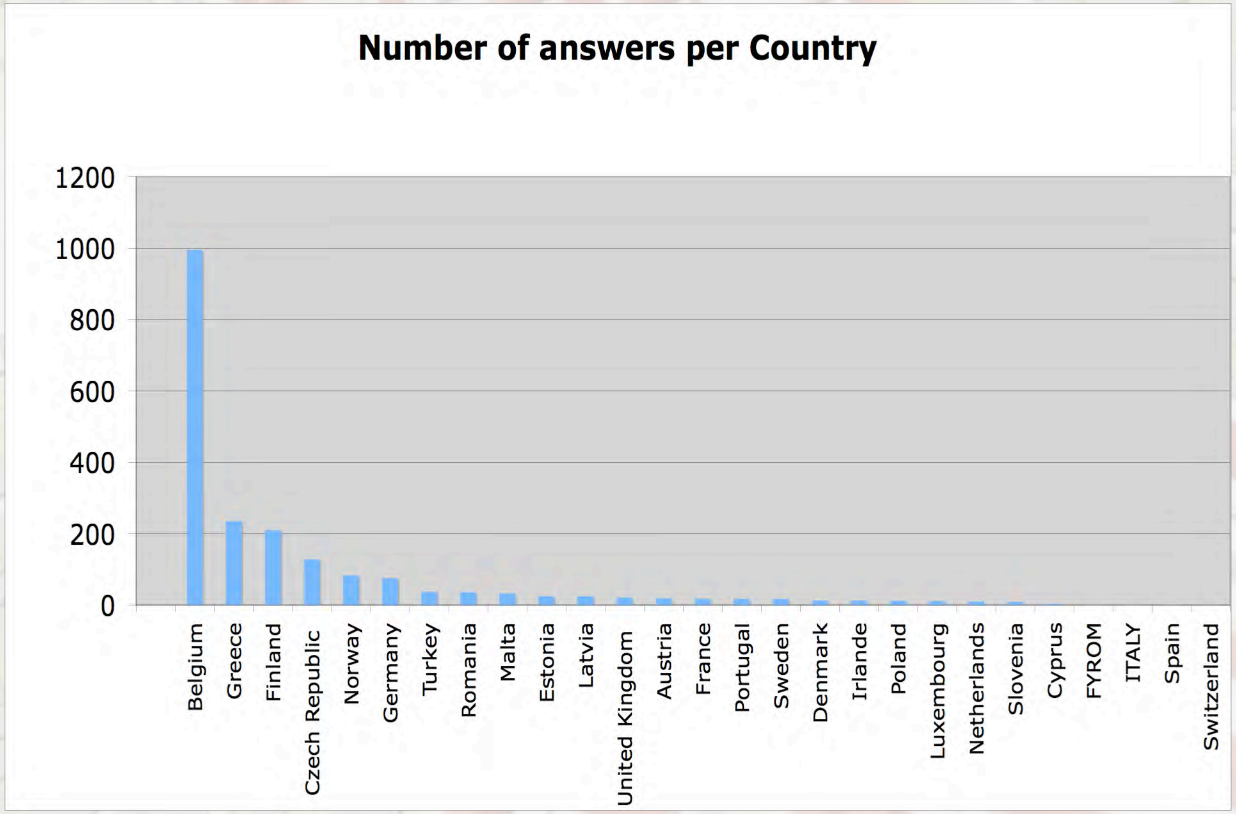
Breakdown of Responses:



Countries	Number of answers
Belgium	995
Greece	235
Finland	210
Czech Republic	128
Norway	83
Germany	75
Turkey	37
Romania	36
Malta	33
Estonia	25
Latvia	25
United Kingdom	21
Austria	18
France	17
Portugal	17
Sweden	17
Denmark	13
Irlande	13
Poland	12
Luxembourg	11
Netherlands	10
Slovenia	9
Cyprus	3
FYROM	1
ITALY	1
Spain	1
Switzerland	1
TOTAL	2047

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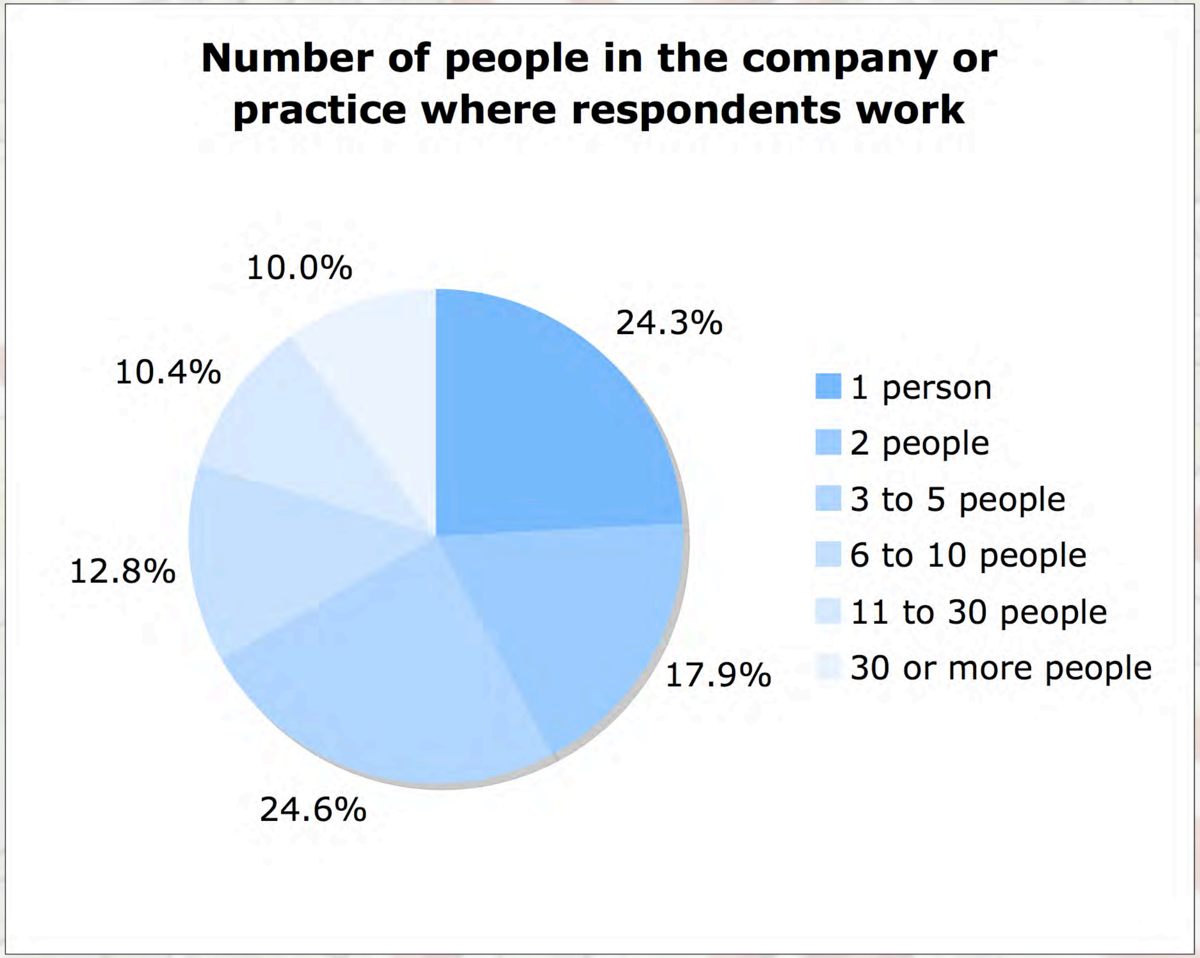
Profile of Respondents:



Good Representation from all sizes of Architectural Practice

Spread Reflects Sector Study Profile well

No Other Information About Respondents was Sought

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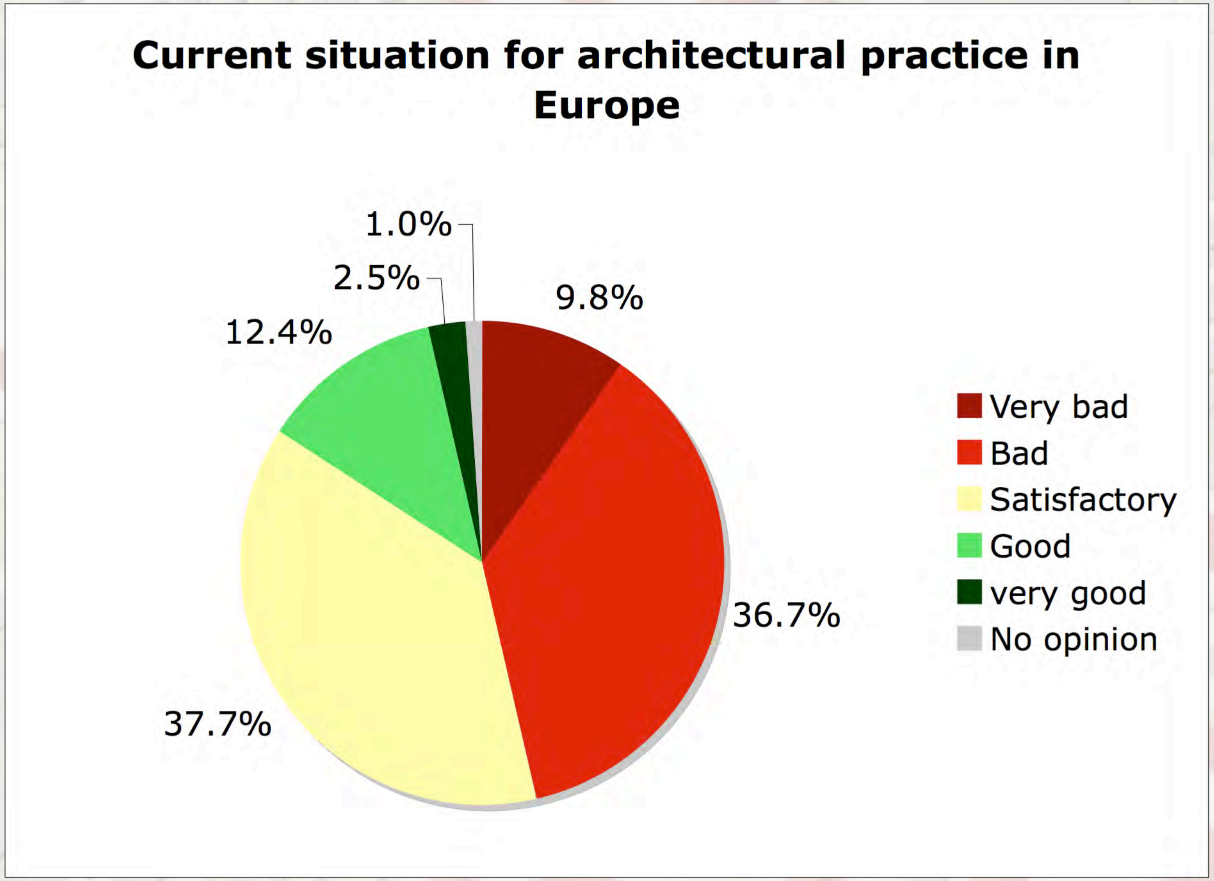

Pessimistic	46.5%	14.9%	Optimistic

Overall a Pessimistic Outlook

Difficult to Conclude Anything Else as This is a Baseline Survey

Survey to be Repeated Every 3 Months

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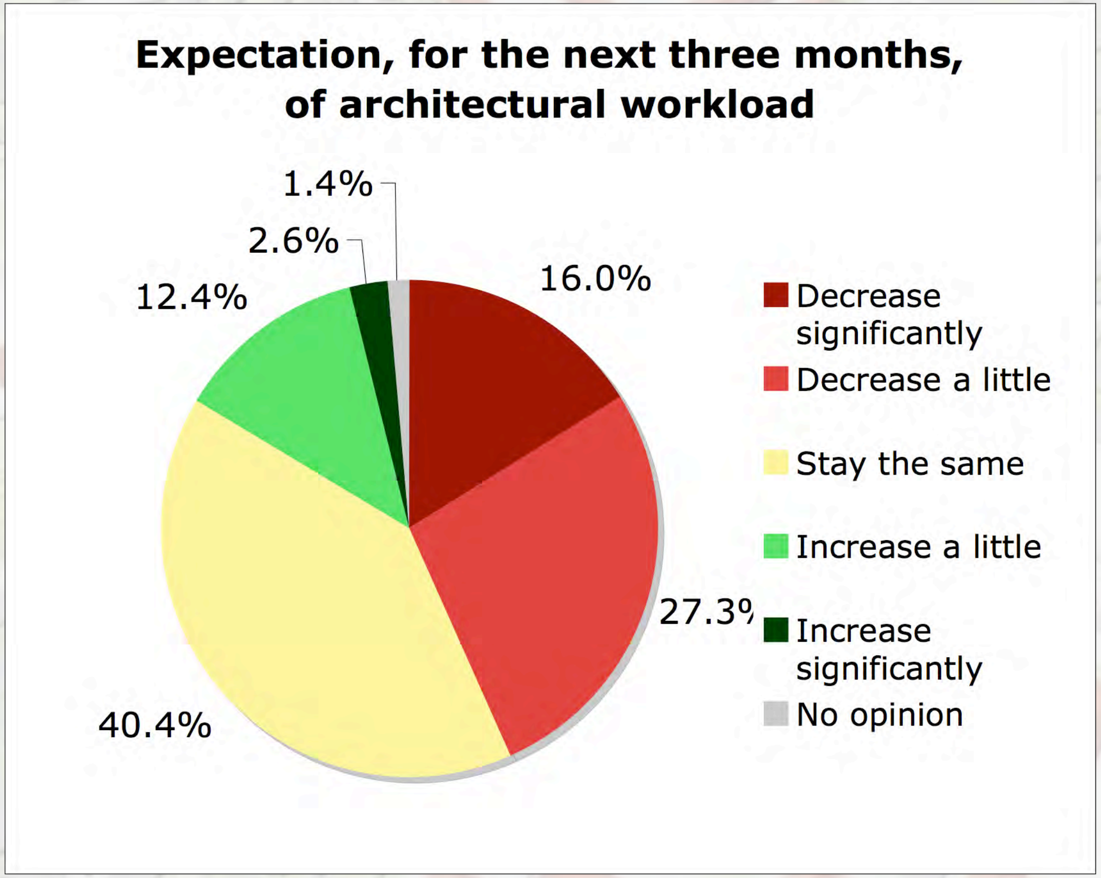

Pessimistic	43.3%	15.0%	Optimistic

Breakdown by Building Type Comes Later in the Presentation

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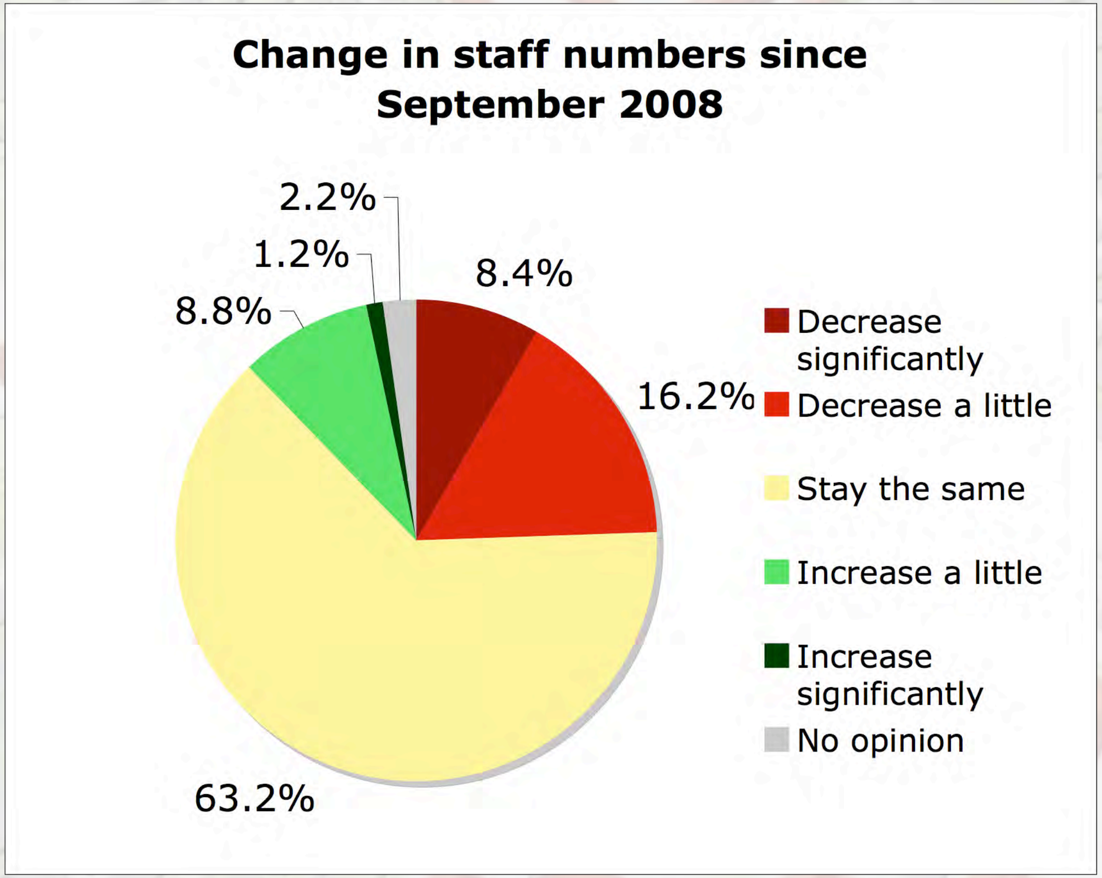

Decreased	24.6%	10.0%	Increased

Assumption is That the Economic Crisis Started to be Felt in September 2008

Net Decrease is 14.6%

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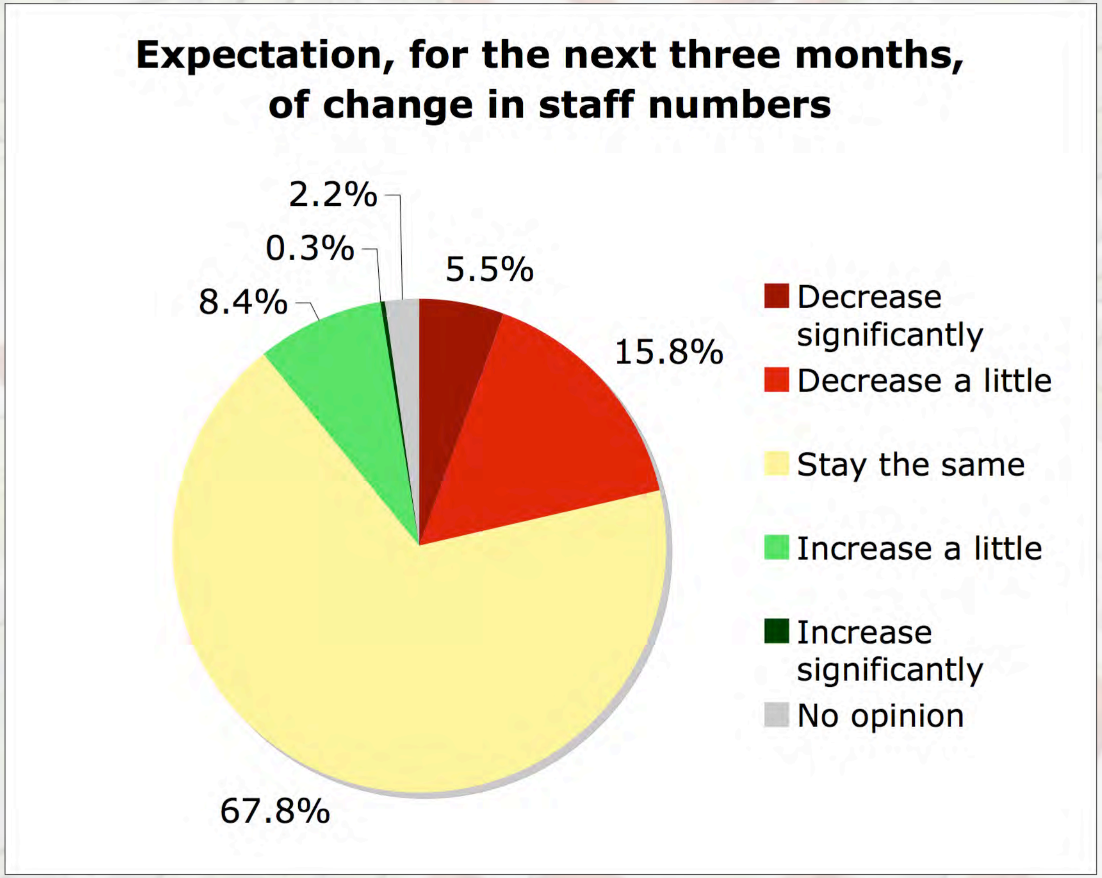

Pessimistic	21.3%	8.7%	Optimistic

Net Decrease is Expected to be 12.6%

Combined with Last Slide this Adds up to 27.2% Net Decrease in a 9-Month Period!

Economic Impact Survey

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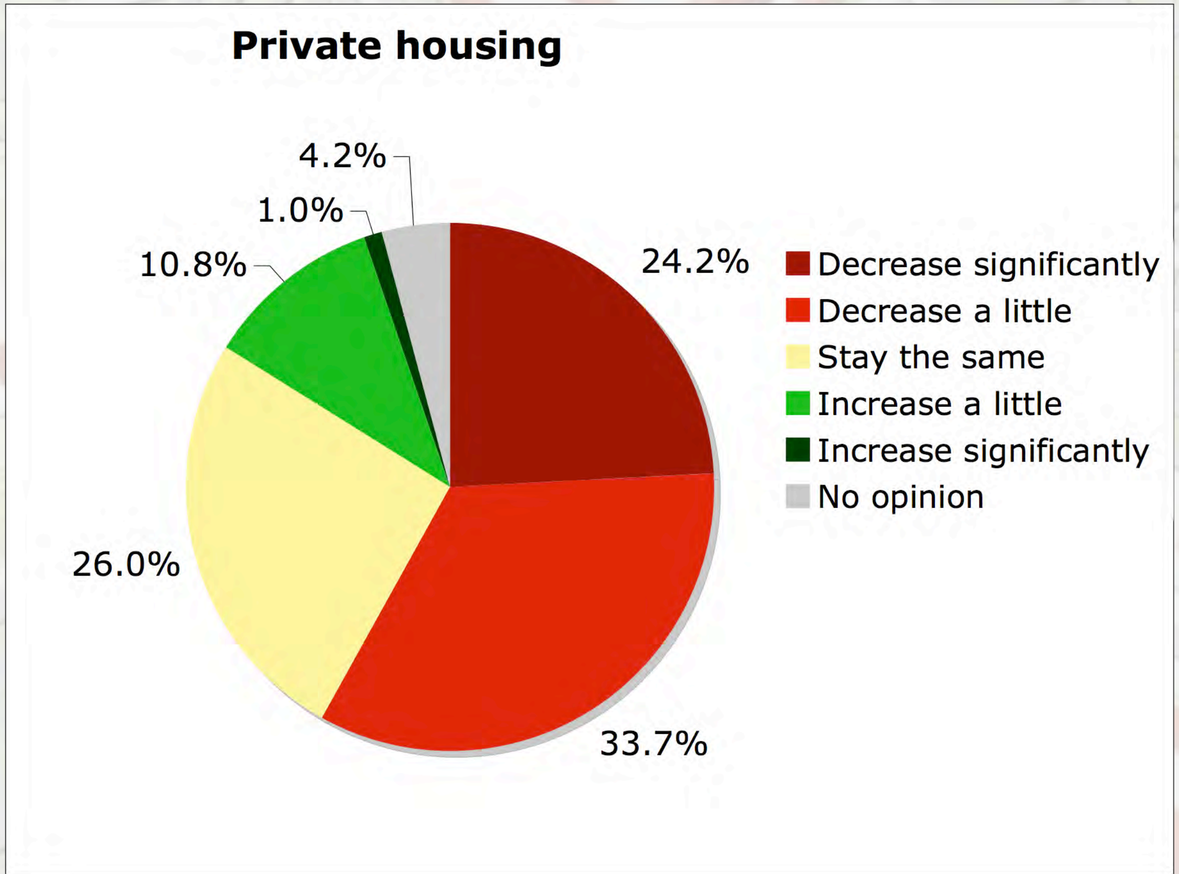
Expected Change in Workload Over Next 3 Months:



Pessimistic	57.9%	11.8%	Optimistic

Delegates are Reminded that Private Housing Accounts for 45% of the Market for Architects in Europe

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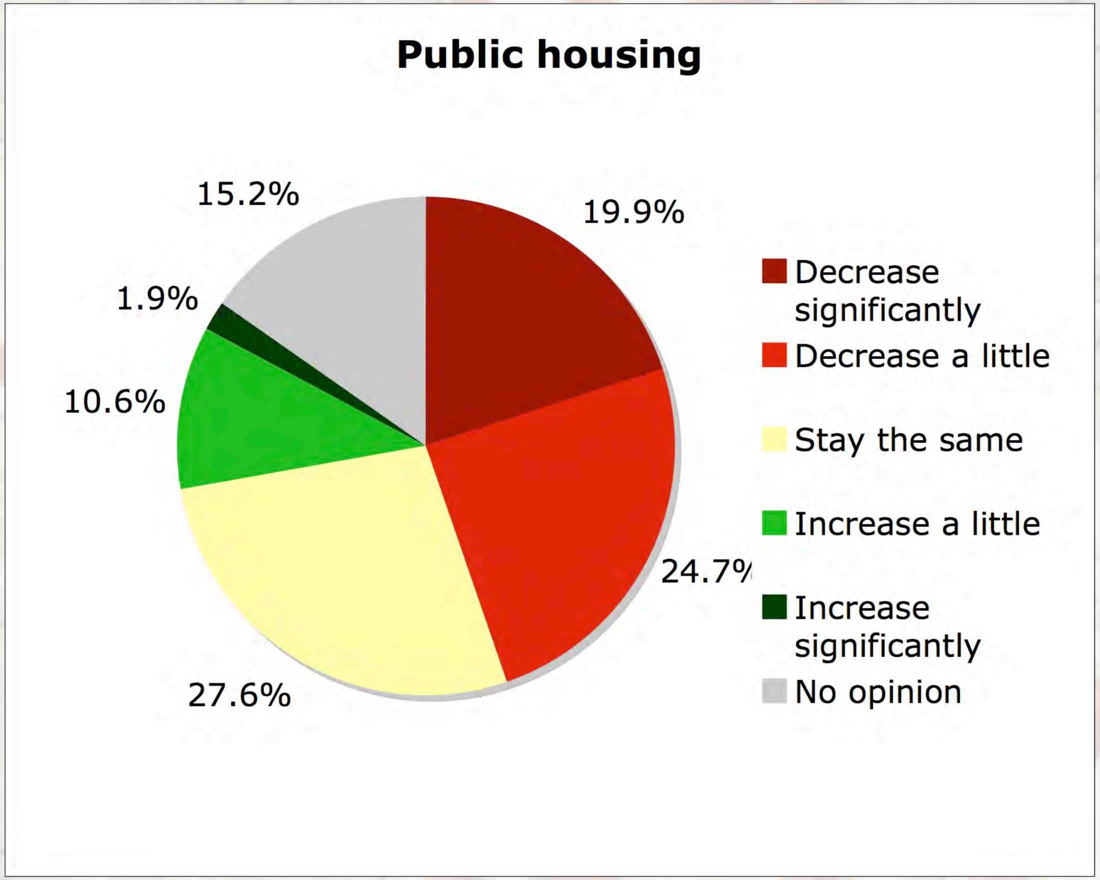
Expected Change in Workload Over Next 3 Months:



Pessimistic	44.6%	12.5%	Optimistic

Delegates are Reminded that Public Housing Accounts for 4% of the Market for Architects in Europe

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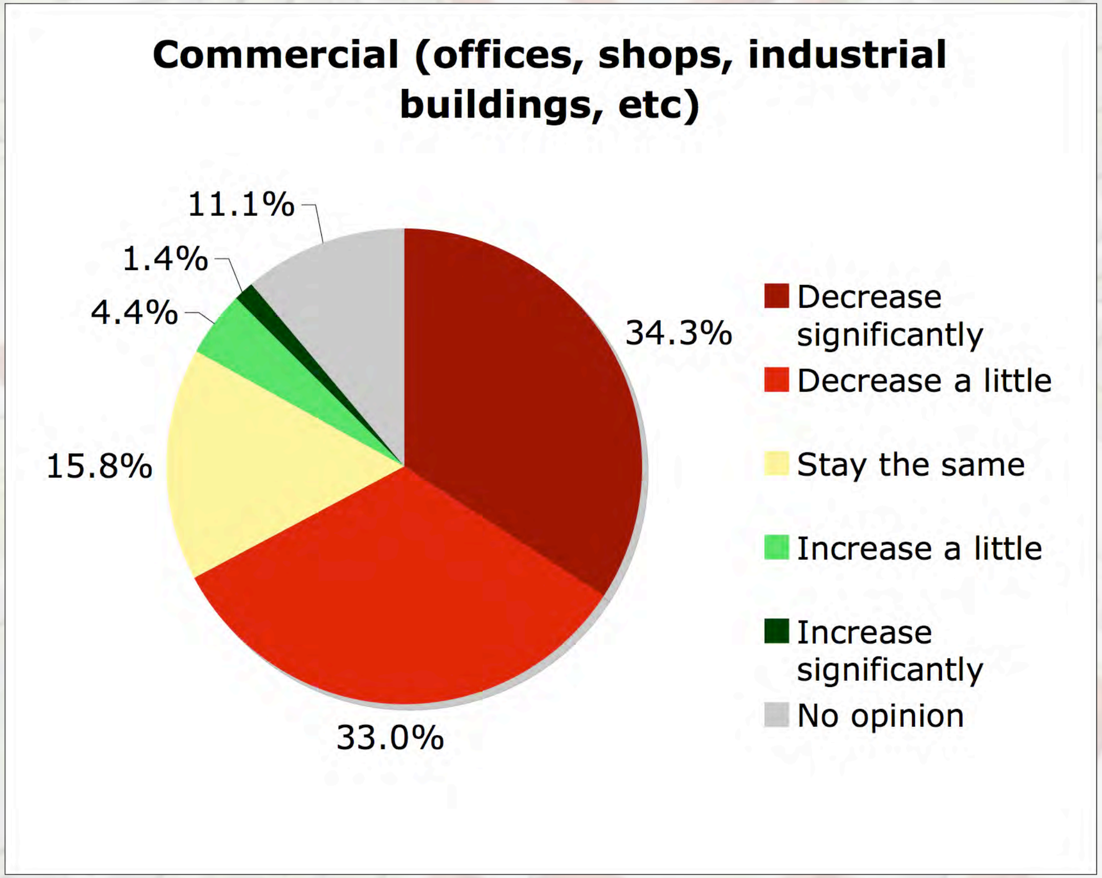
Expected Change in Workload Over Next 3 Months:



Pessimistic	67.3%	5.8%	Optimistic

Delegates are Reminded that Commercial Projects Account for 23% of the Market for Architects in Europe

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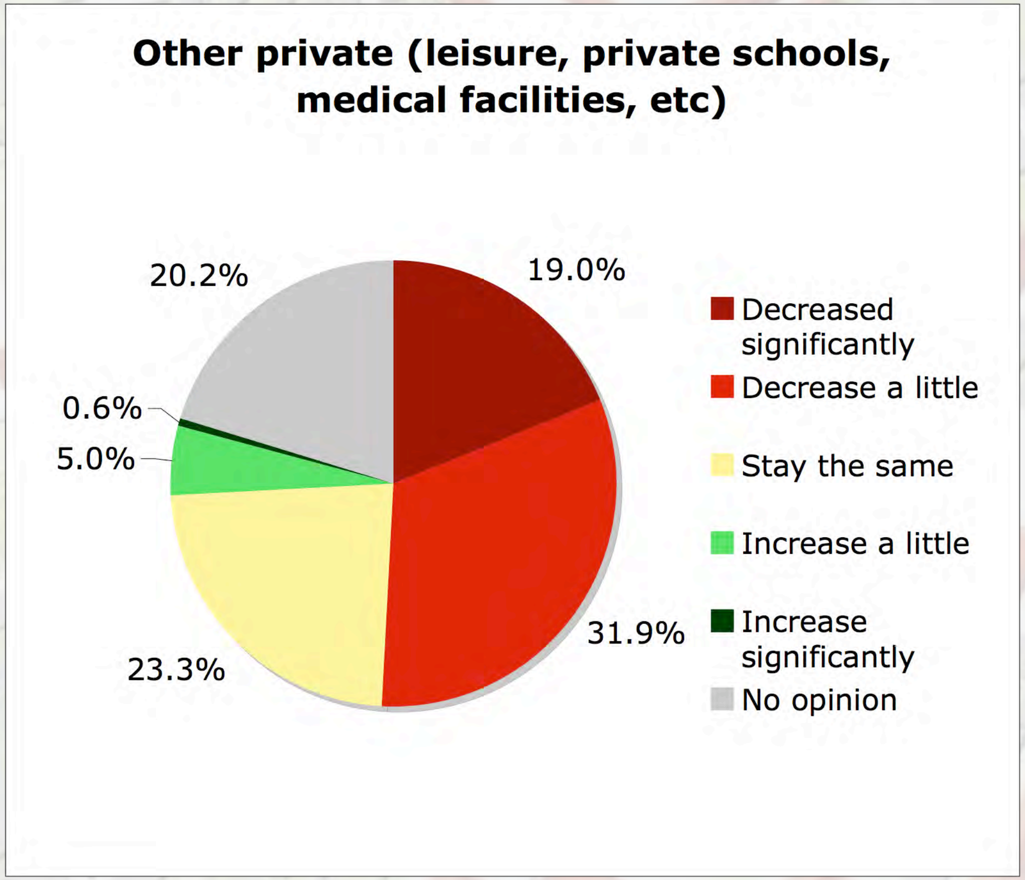
Expected Change in Workload Over Next 3 Months:



Pessimistic	50.9%	5.6%	Optimistic

Delegates are Reminded that Other Private Projects Account for 10% of the Market for Architects in Europe

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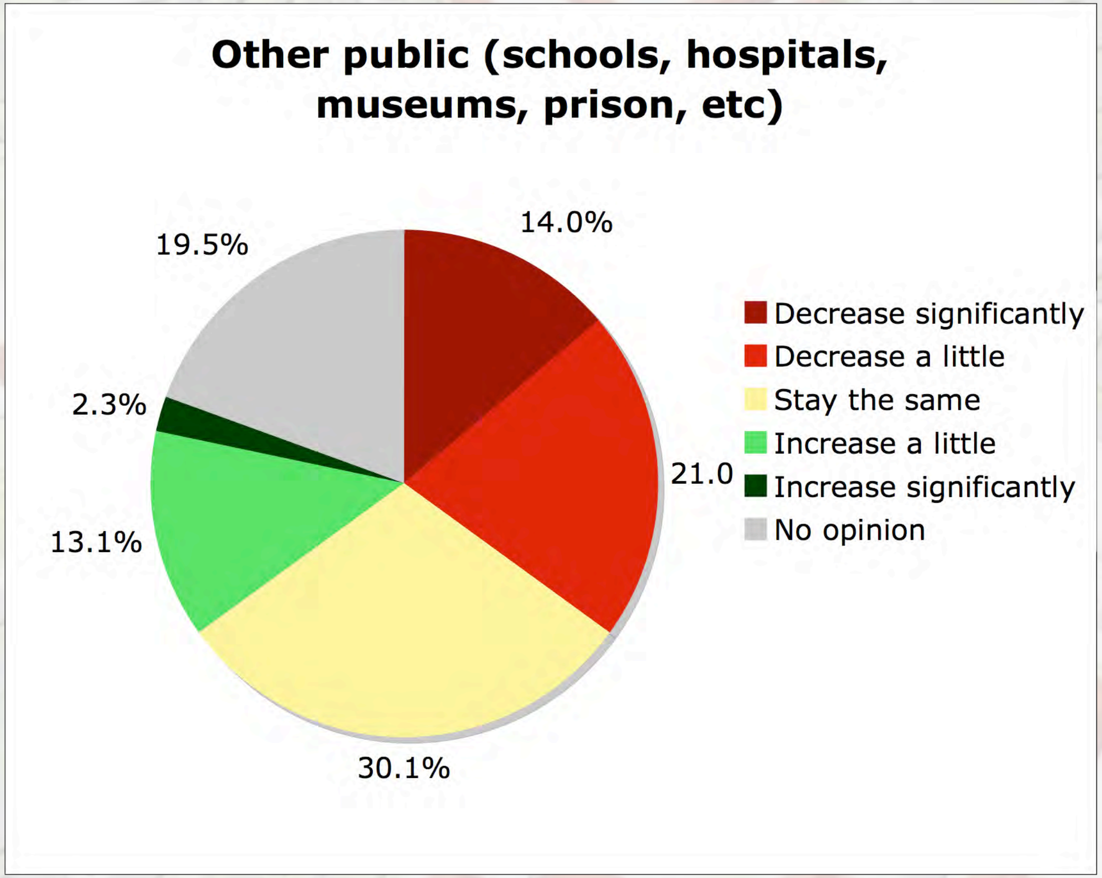
Expected Change in Workload Over Next 3 Months:



Pessimistic	35.0%	15.4%	Optimistic

Delegates are Reminded that Other Public Projects Account for 20% of the Market for Architects in Europe

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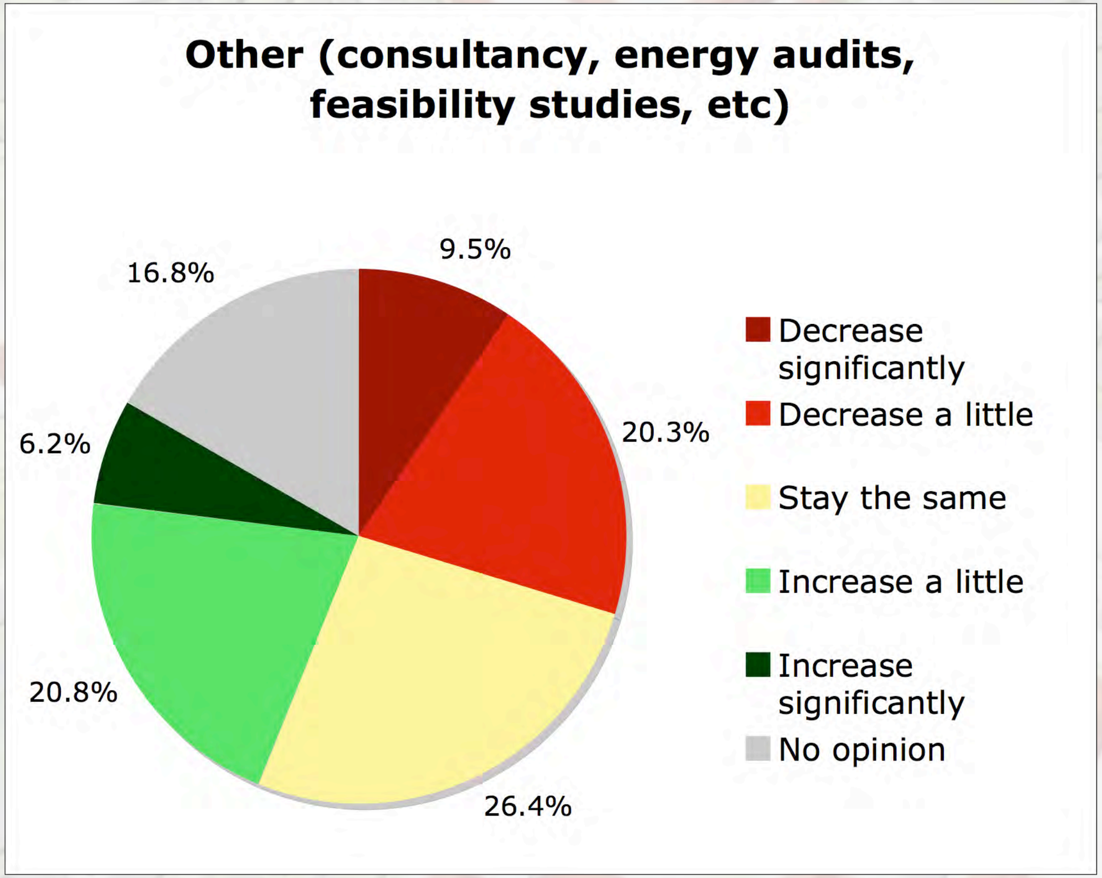
Expected Change in Workload Over Next 3 Months:



Pessimistic	29.8%	27.0%	Optimistic

It is Not Known What the Percentage of Workload These Tasks Represent, but This is the Area that Represents Most Optimism About Future Workload

Economic Impact Survey

April-09

Conclusions:

- **Important to Repeat the Survey Regularly**
- **The Profession is, Generally, Badly Affected at the Present Time**

- **Opportunity Exists to Collect, Consolidate and Capitalise on Existing Policy Work and to Prepare for the Future**

- **Need to Share the Experiences and Strategies of Member Organisations as They Cope with the Effects of the Crisis**