ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

December 2009

Fourth Snapshot Survey Of Impact of Economic Crisis

Fourth Economic Impact Survey Dec-09

Methodology:

- Secretariat Used the Same Questions as the 1st 2nd and 3rd Surveys and the ACE Internet Service Provider Created the Online Questionnaire
- Questions Translated into 15 Languages
- 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 a 2 Week Period (Ended on the 20th of December 2009)
- 3, 591 Responses from ACE Member Countries
- All results weighted to give more Statistical Reliability

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Breakdown of Responses:

Country	Answers in April	Answers in June	Answers in September	Answer in December
France	17	1736	1508	1652
Irlande	13	91	354	14
Romania	36	315	296	210
Germany	75	127	208	87
Bulgaria	0	17	170	96
Greece	235	216	162	180
Czech Republic	128	55	151	67
Turkey	37	130	147	123
Poland	12	18	54	53
United Kingdom	21	27	32	22
Belgium	995	630	31	39
Finland	210	32	30	17
Austria	18	7	24	19
Croatia	0	126	24	5
Spain	1	21	18	600
Portugal	17	75	17	80
Sweden	17	51	16	12

Country	Answers in April	Answers in June	Answers in September	Answer in December
Denmark	13	92	13	14
Latvia	25	22	12	22
Malta	33	13	11	15
Slovenia	9	9	11	92
Netherlands	10	7	9	14
Italy	1	83	8	39
Switzerland	1	6	7	3
Hungary	0	121	5	0
Luxembourg	11	12	5	9
Cyprus	3	3	0	0
Estonia	25	23	0	39
FYROM	1	0	0	3
Lithuania	0	37	0	35
Norway	83	2	0	2
Slovakia	0	0	0	28
Bosnia & Herzegovina	0	2	0	0
TOTAL	**2047**	**4106**	**3323**	**3591**

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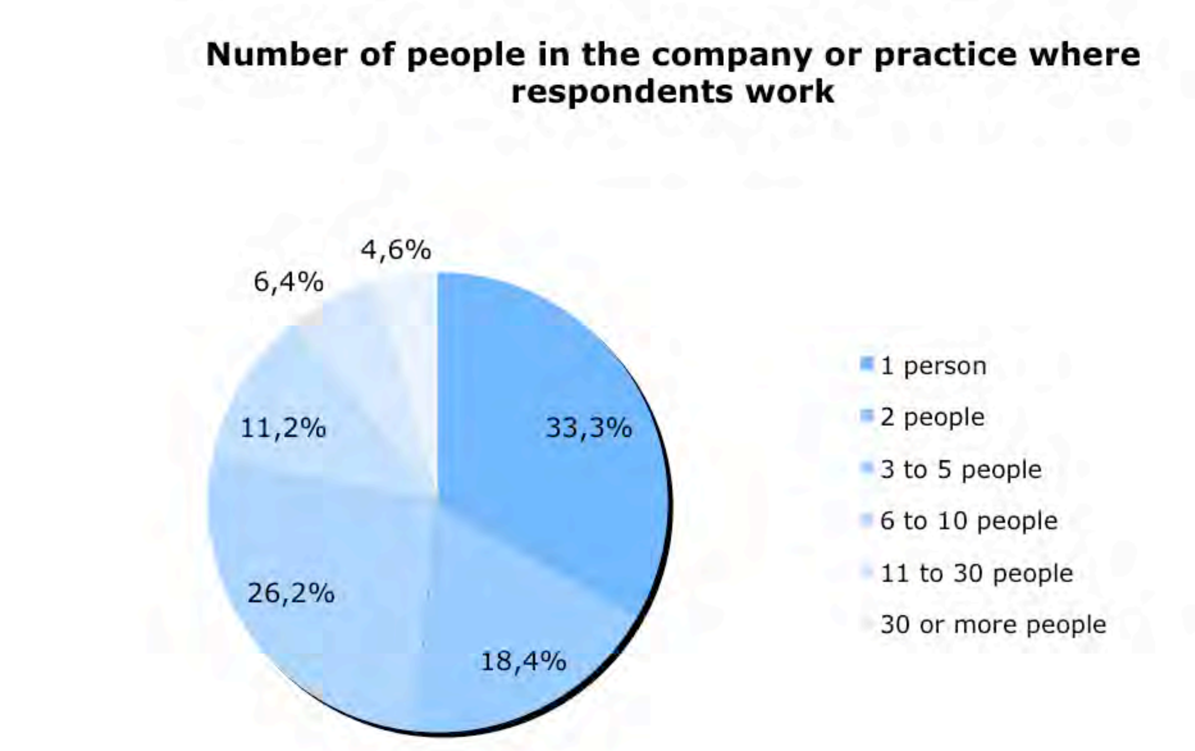
Profile of Respondents:



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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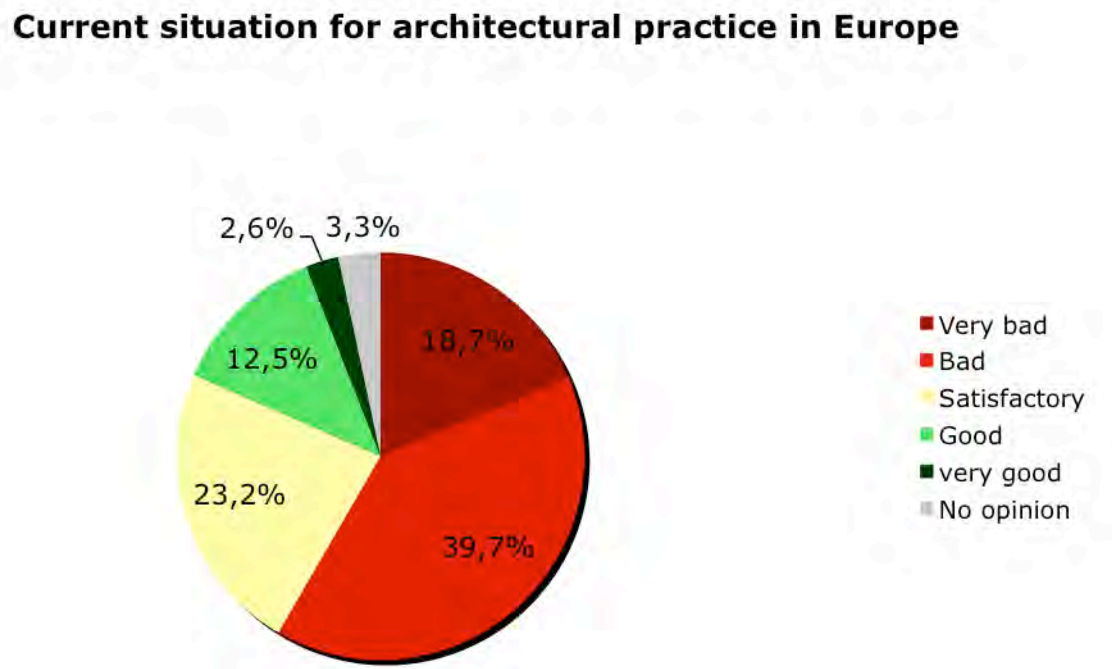

	Pessimistic	Optimistic
April	65,16%	8,41%
June	58,55%	12,67%
September	56,03%	13,21%
December	58,40%	15,10%

Overall a Trend Towards More Optimism as 2009 Advances

Survey to be Repeated in 2010 to Extend Trend Analysis

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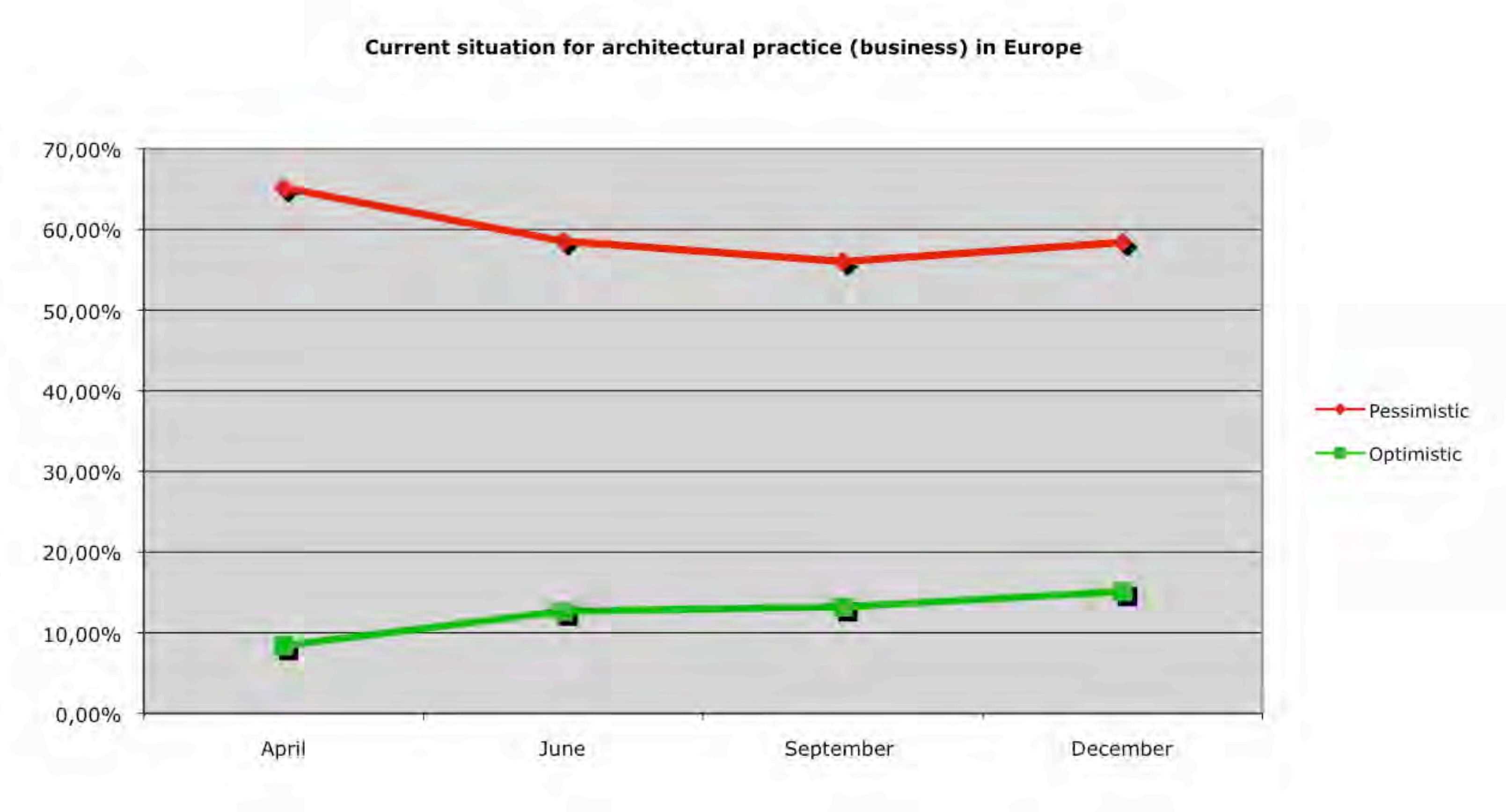
Current Situation for Architectural Practice in Europe



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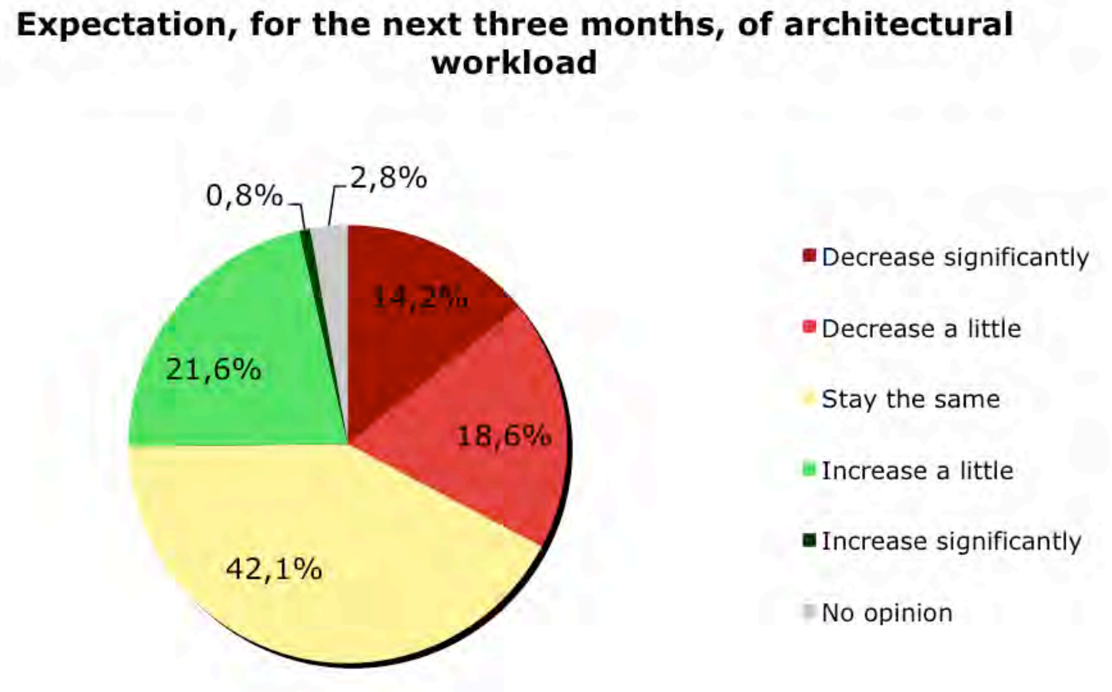

Breakdown by Building Type Comes Later in the Presentation

	Pessimistic	Optimistic
April	48,47%	13,09%
June	39,60%	20,11%
September	32,30%	24,49%
December	32,80%	22,40%

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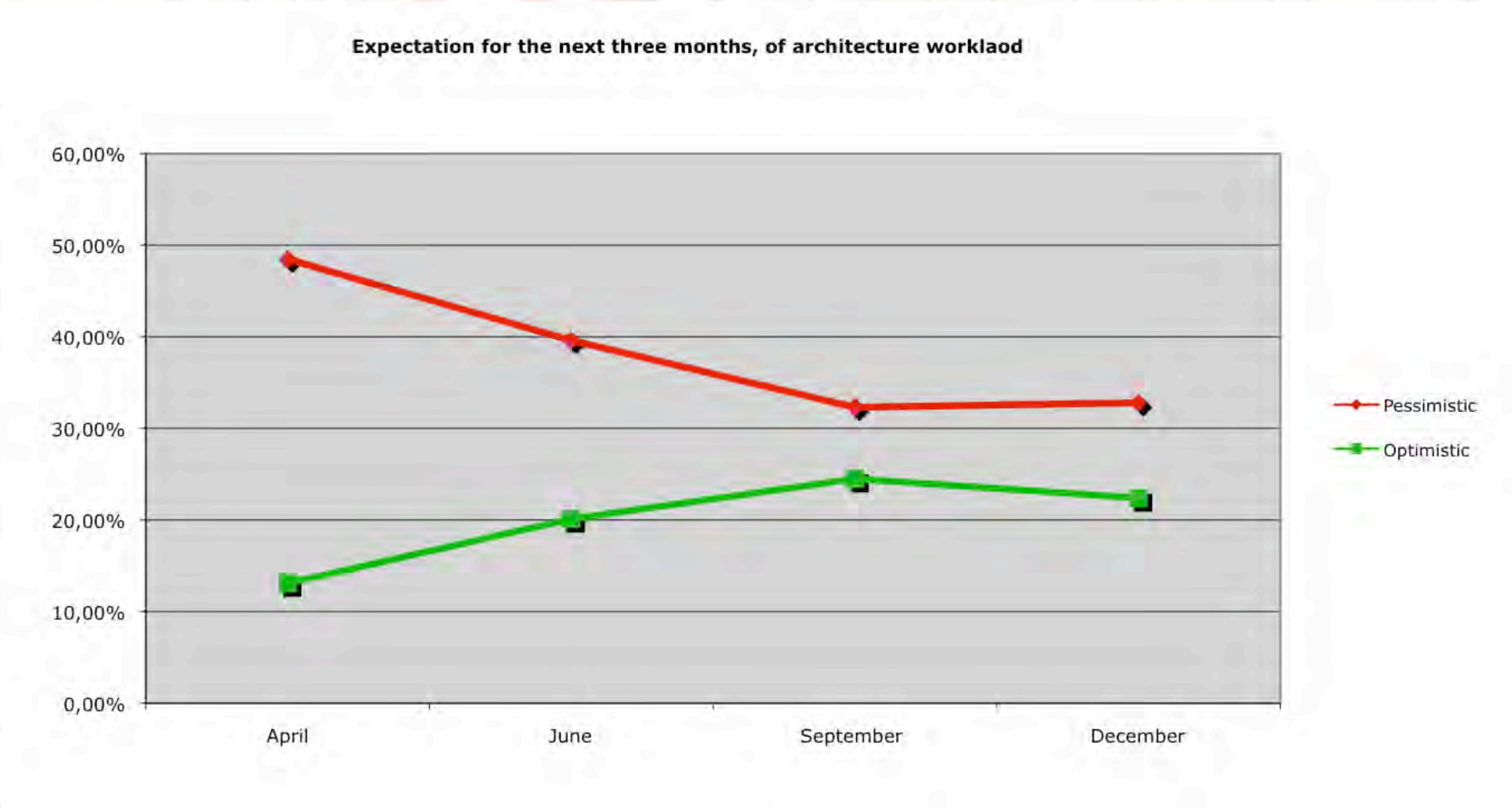
Expectation, for the next three months, of Architecture Workload



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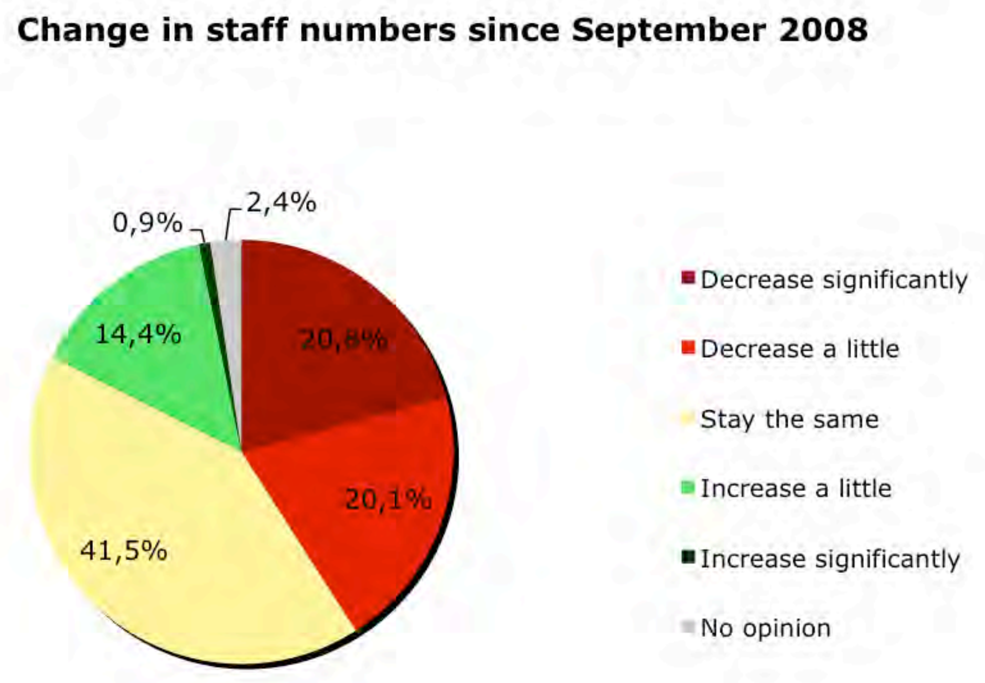

The assumption behind this question is that the economic crisis started to be felt in September 2008

From these answers we can see that 40% of architects offices have seen a decrease in staff numbers since September 2008

	Pessimistic	Optimistic
April	37,18%	6,85%
June	53,60%	11,36%
September	37,49%	12,12%
December	40,90%	15,20%

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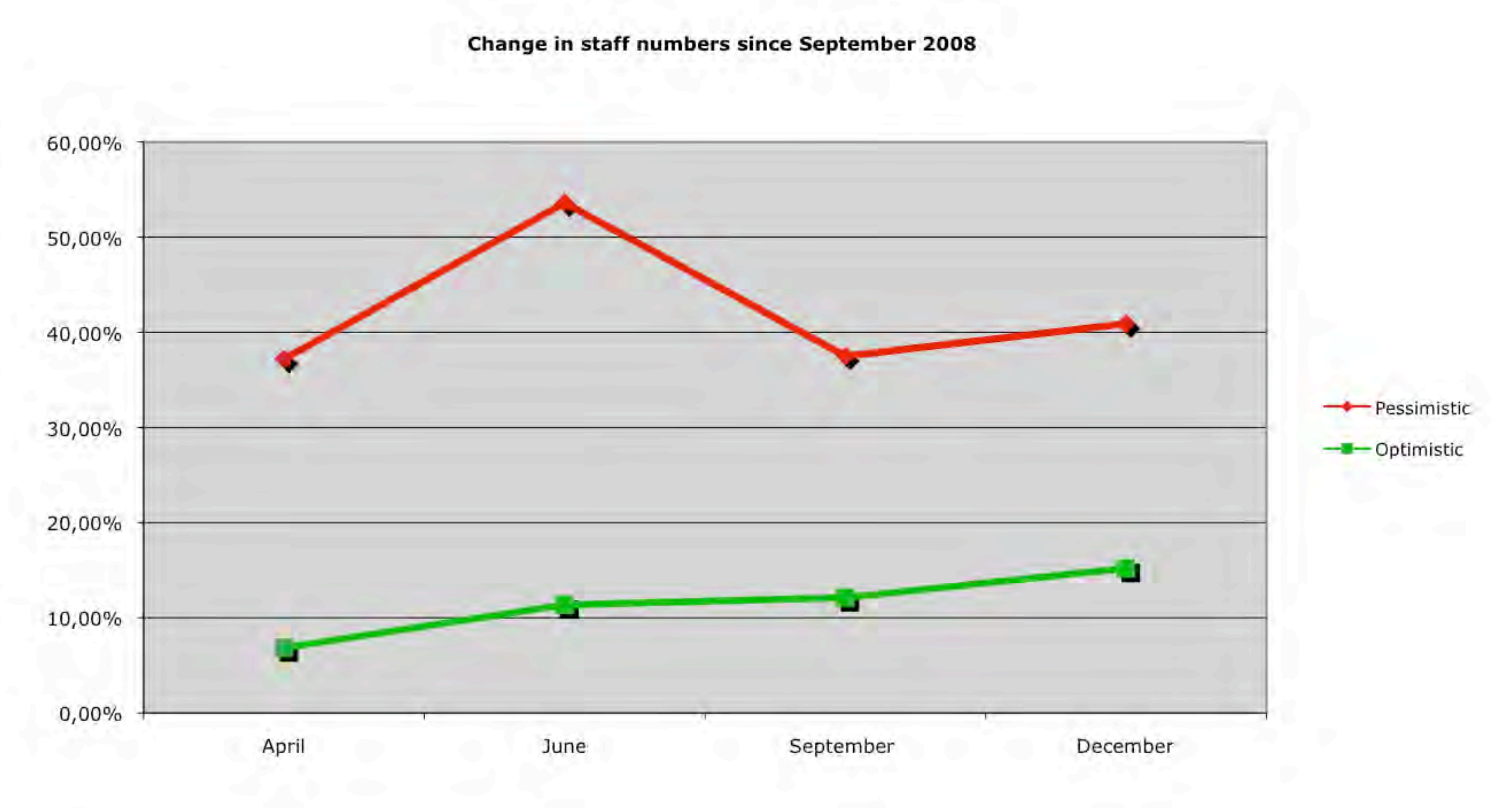
Change in Staff Numbers since September 2008



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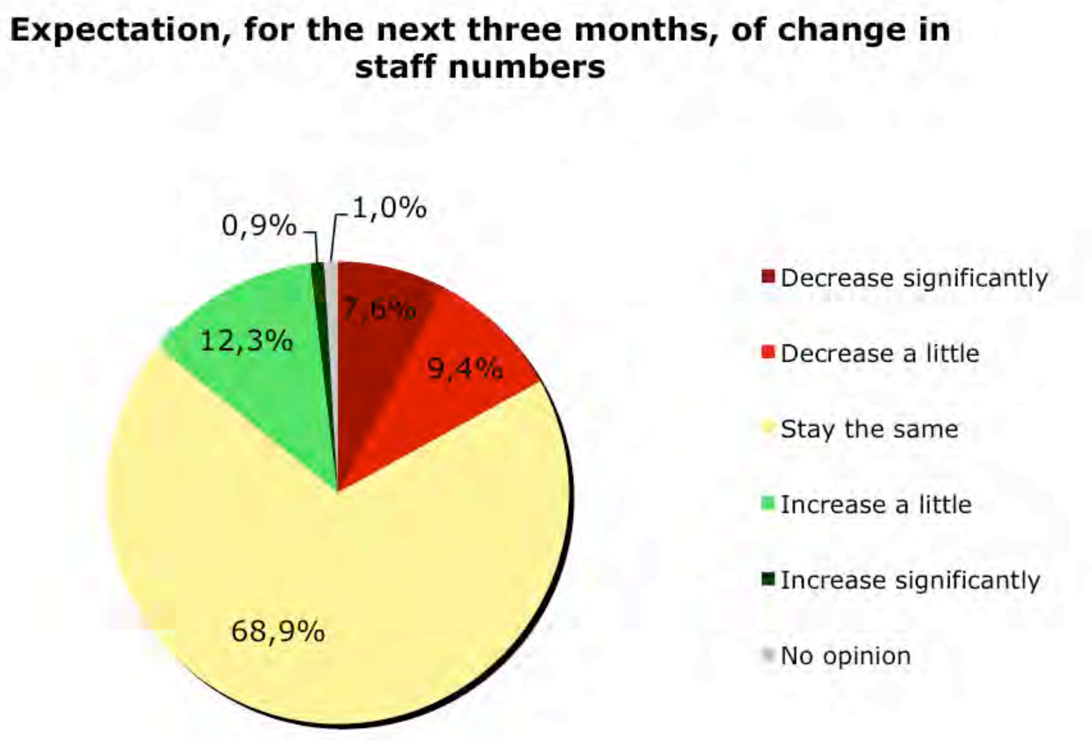

	Pessimistic	Optimistic
April	32,35%	6,15%
June	23,60%	12,90%
September	21,07%	12,25%
December	17,00%	13,20%

From this pie chart we can see that, overall, staff numbers will decrease in 17% of architects offices in the coming three months.

If linked to decreases reported in the previous slide, we can see that optimism about a recovery for the sector is still low but things are improving.

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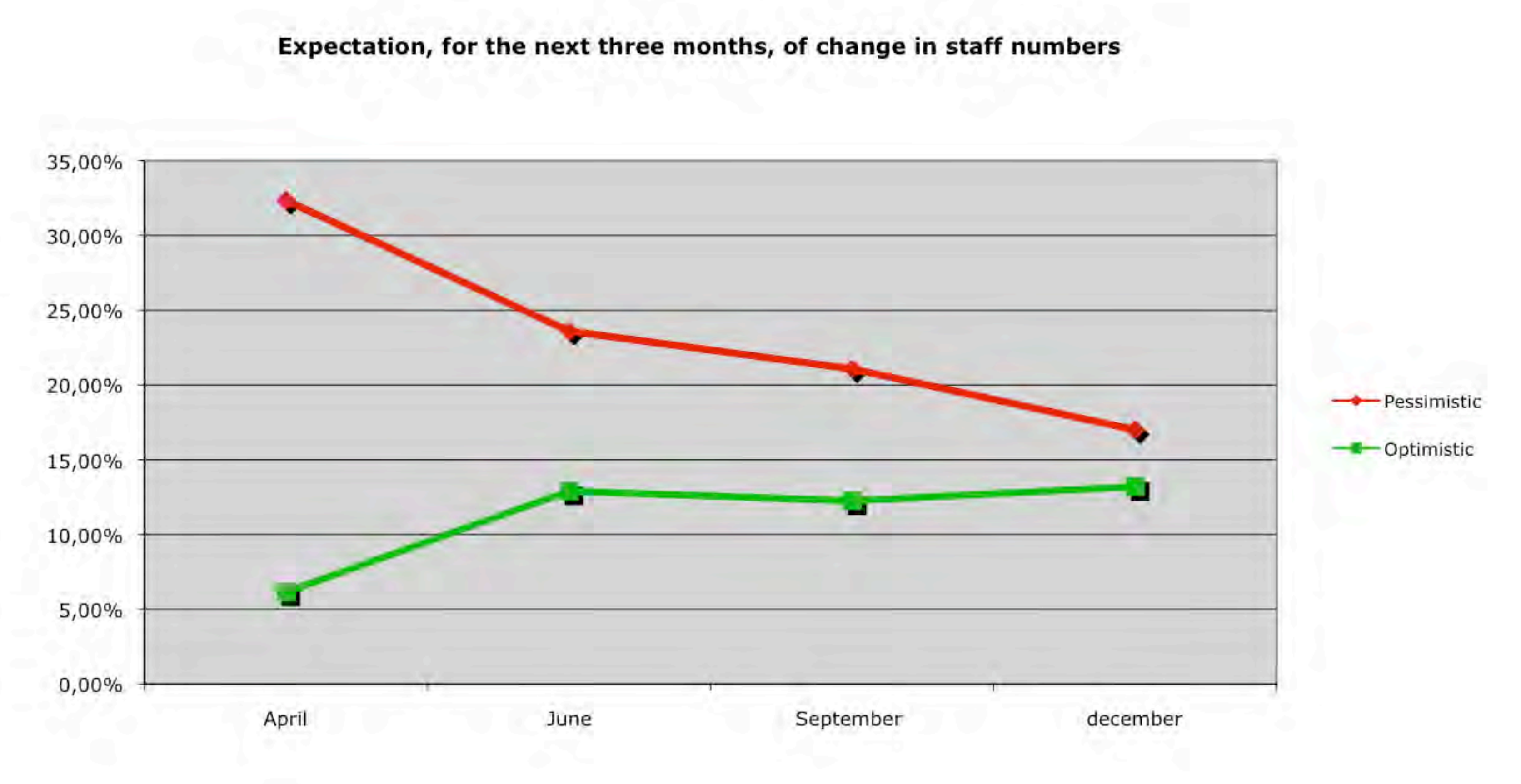
Expectation, for the next three months, for Change in Staff Numbers



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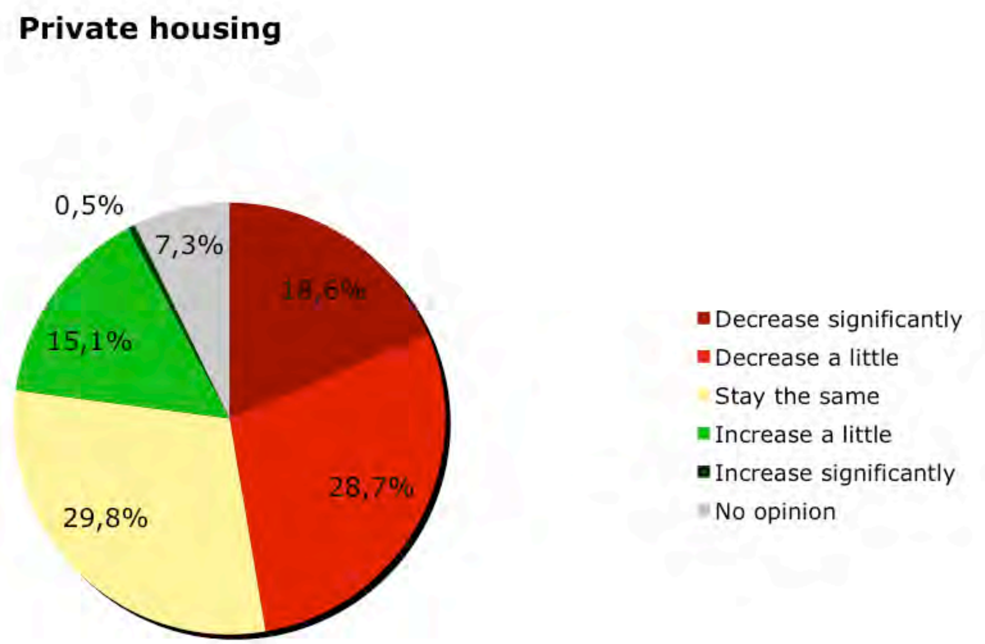
Expected Change in Workload Over Next 3 Months:



Readers are reminded that "private housing" accounts for 45% of the market for architects in Europe

	Pessimistic	Optimistic
April	67,04%	10,44%
June	57,60%	14,87%
September	44,84%	15,88%
December	47,30%	15,70%

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Expected Change in Workload Over Next 3 Months:

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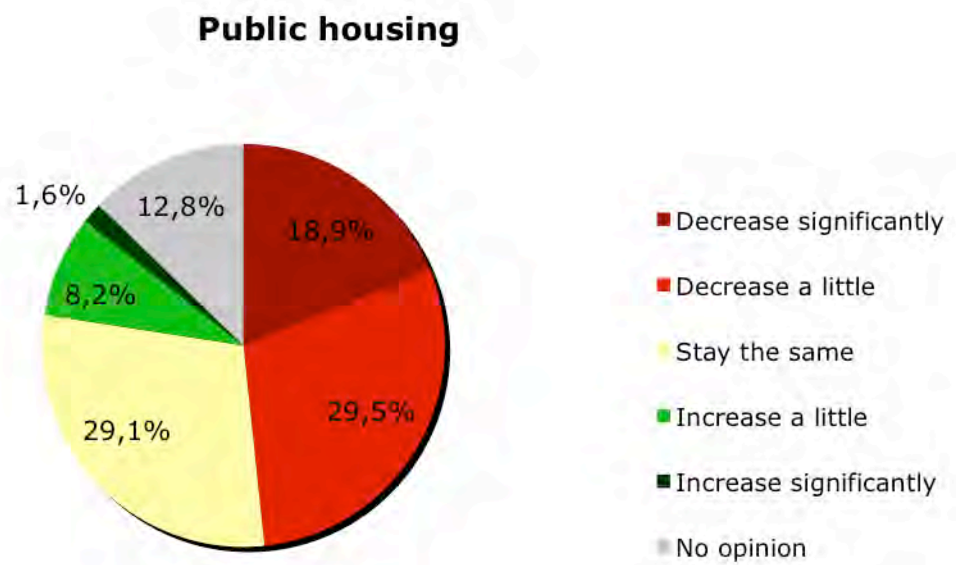
Expected Change in Workload Over Next 3 Months:



Readers are reminded that "public housing" accounts for 4% of the market for architects in Europe

	Pessimistic	Optimistic
April	59,78%	9,73%
June	49,90%	15,31%
September	42,75%	17,31%
December	48,30%	9,80%

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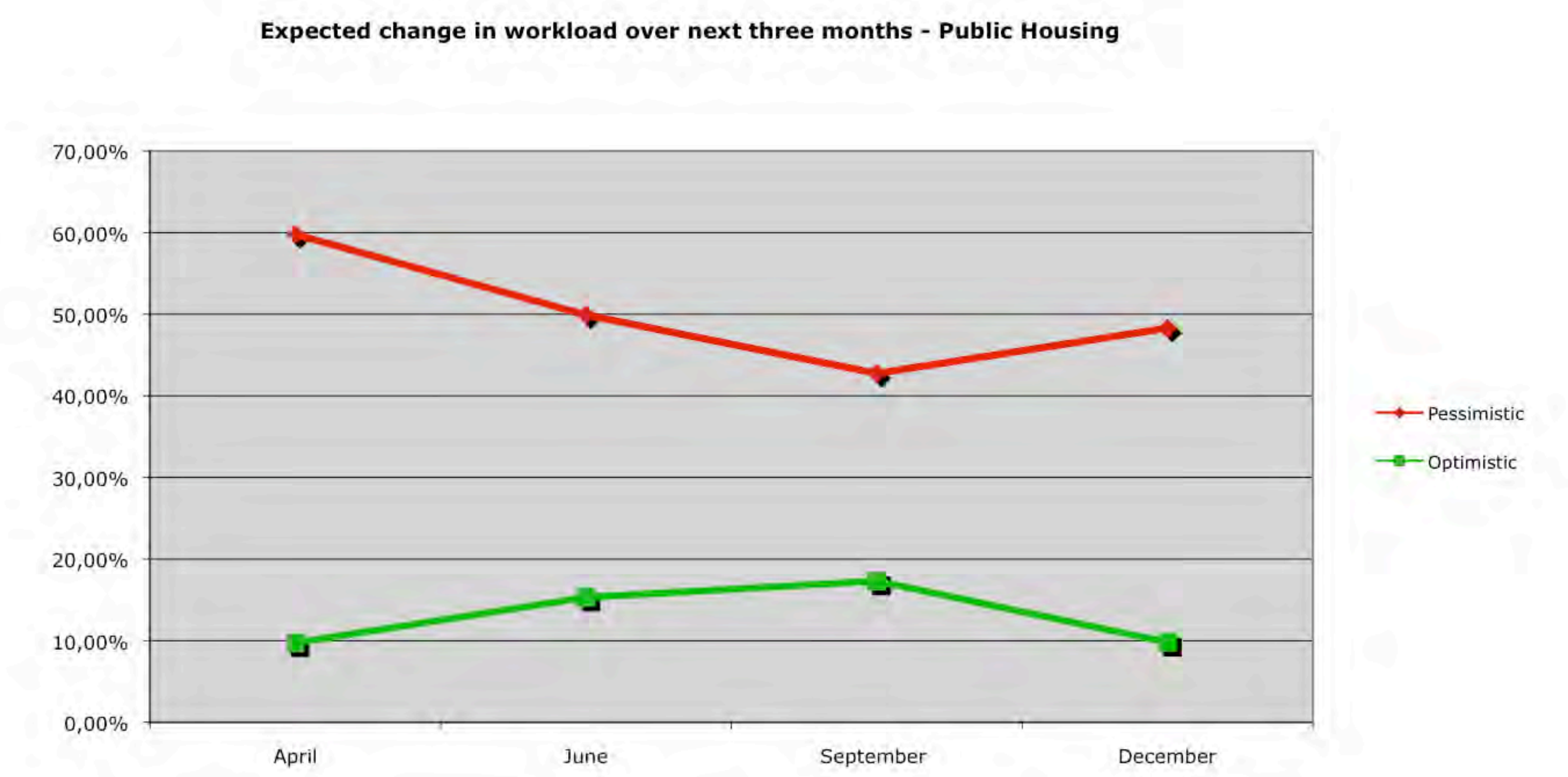
Expected Change in Workload Over Next 3 Months:



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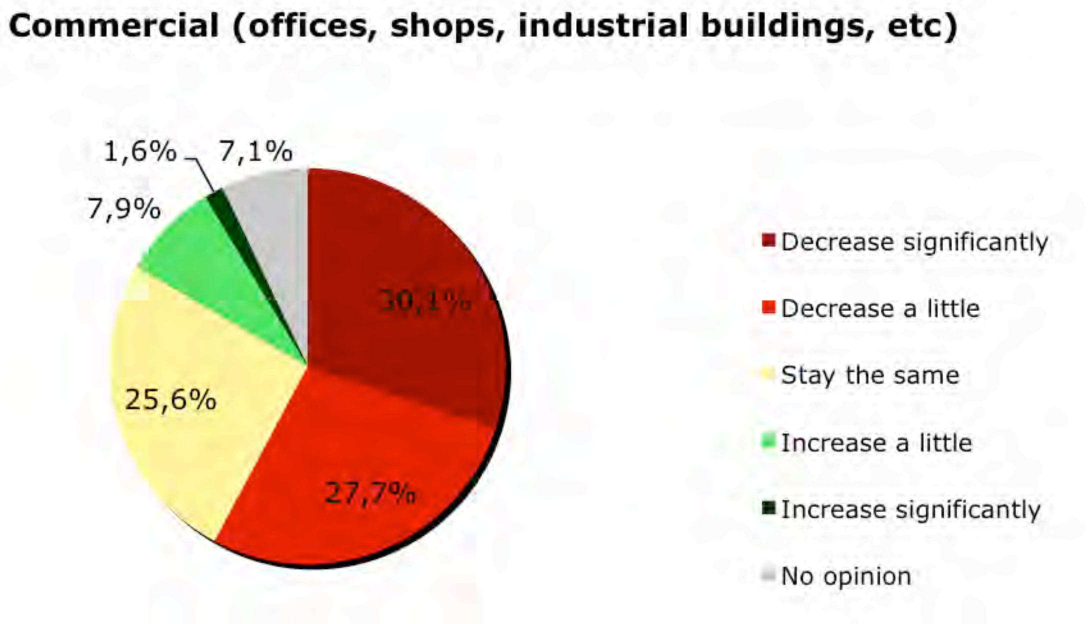
Expected Change in Workload Over Next 3 Months:



Readers are reminded that "commercial" projects account for 23% of the market for architects in Europe

	Pessimistic	Optimistic
April	76,19%	5,18%
June	62,87%	10,08%
September	53,71%	11,56%
December	57,80%	9,50%

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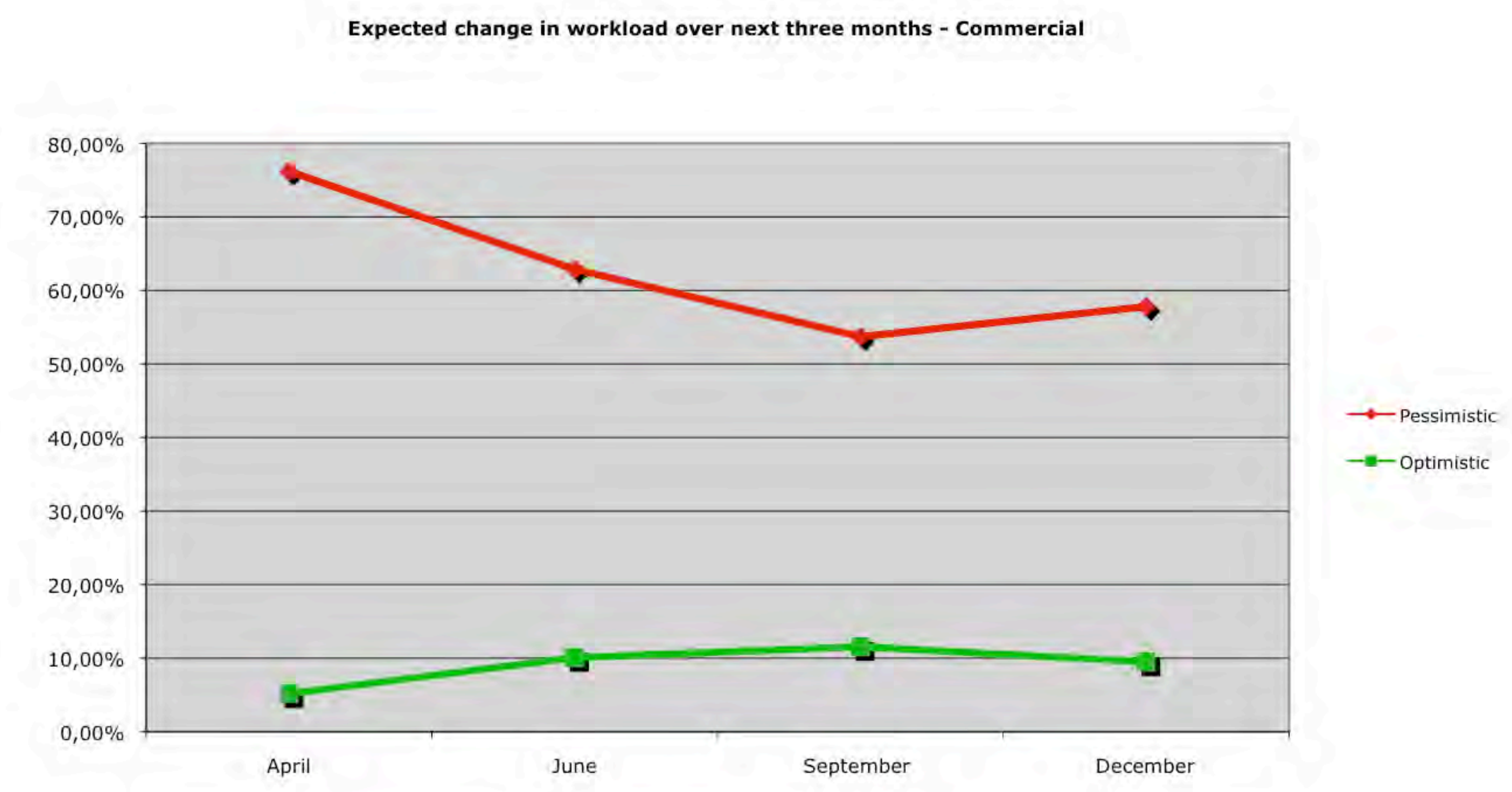
Expected Change in Workload Over Next 3 Months:



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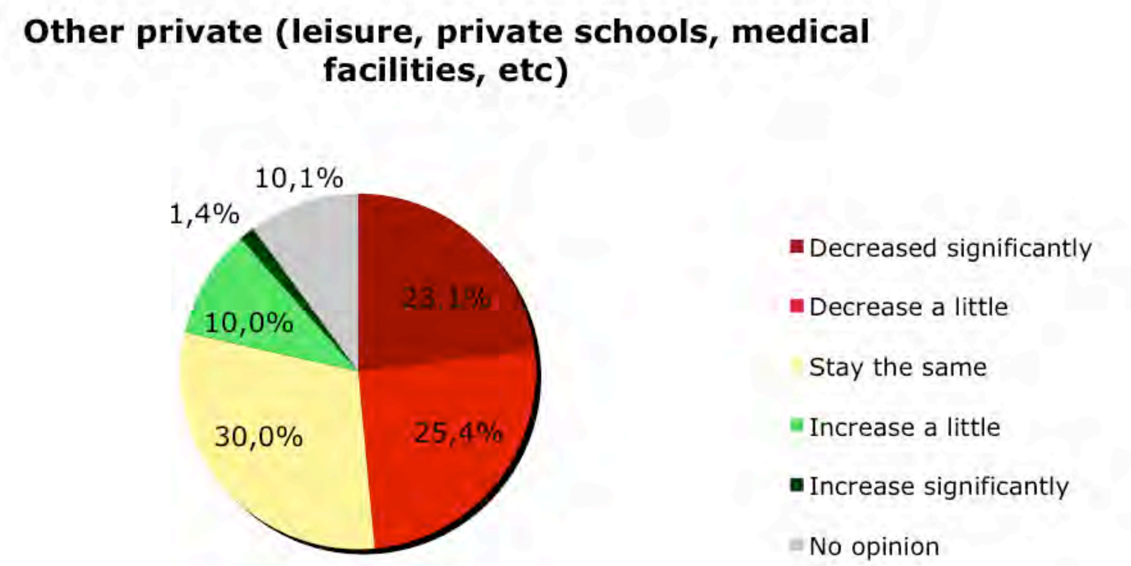
Expected Change in Workload Over Next 3 Months:



Readers are reminded that "other private" projects account for 10% of the market for architects in Europe

	Pessimistic	Optimistic
April	62,07%	3,12%
June	58,16%	11,05%
September	43,12%	14,06%
December	48,50%	11,40%

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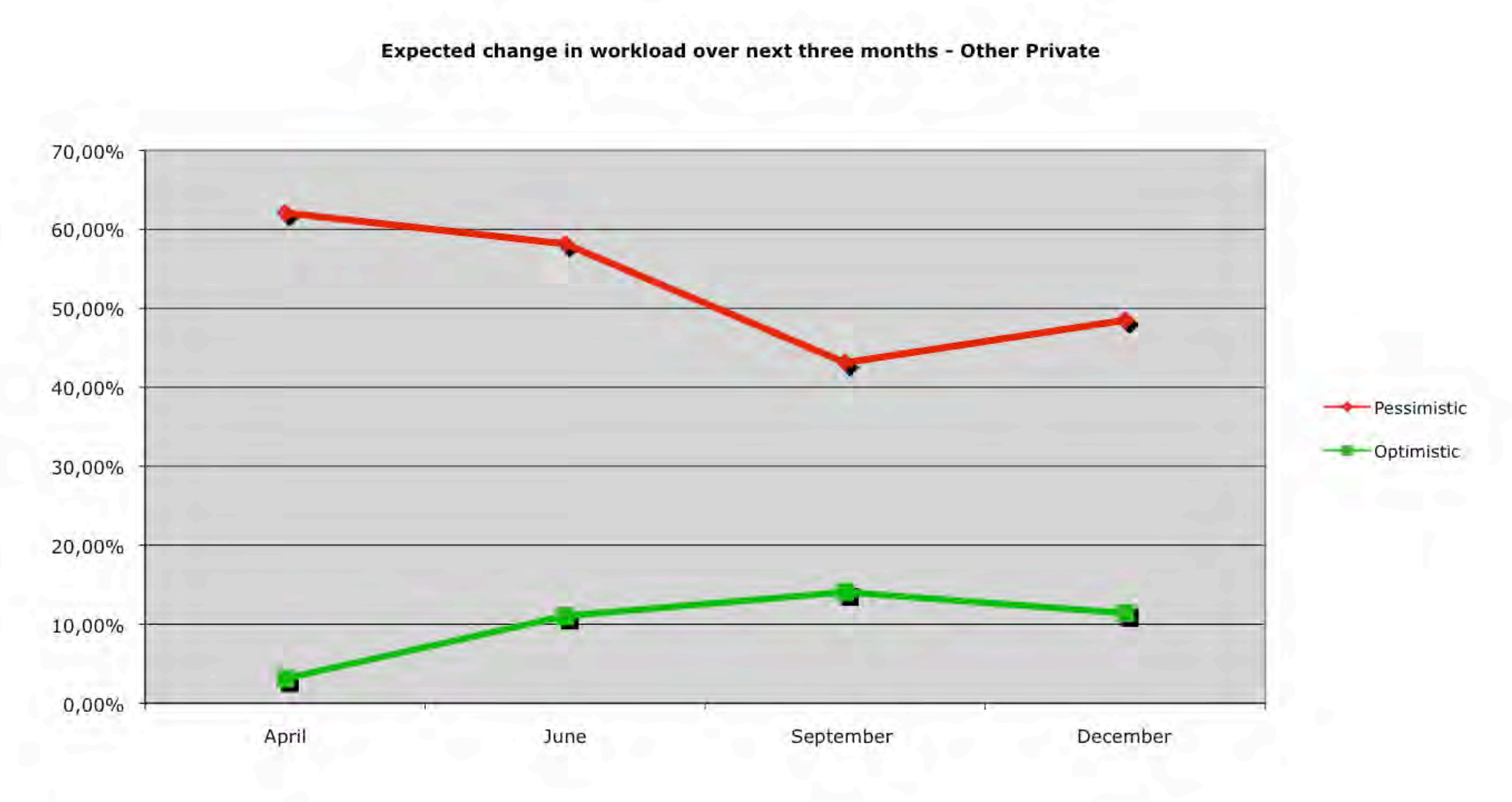
Expected Change in Workload Over Next 3 Months:



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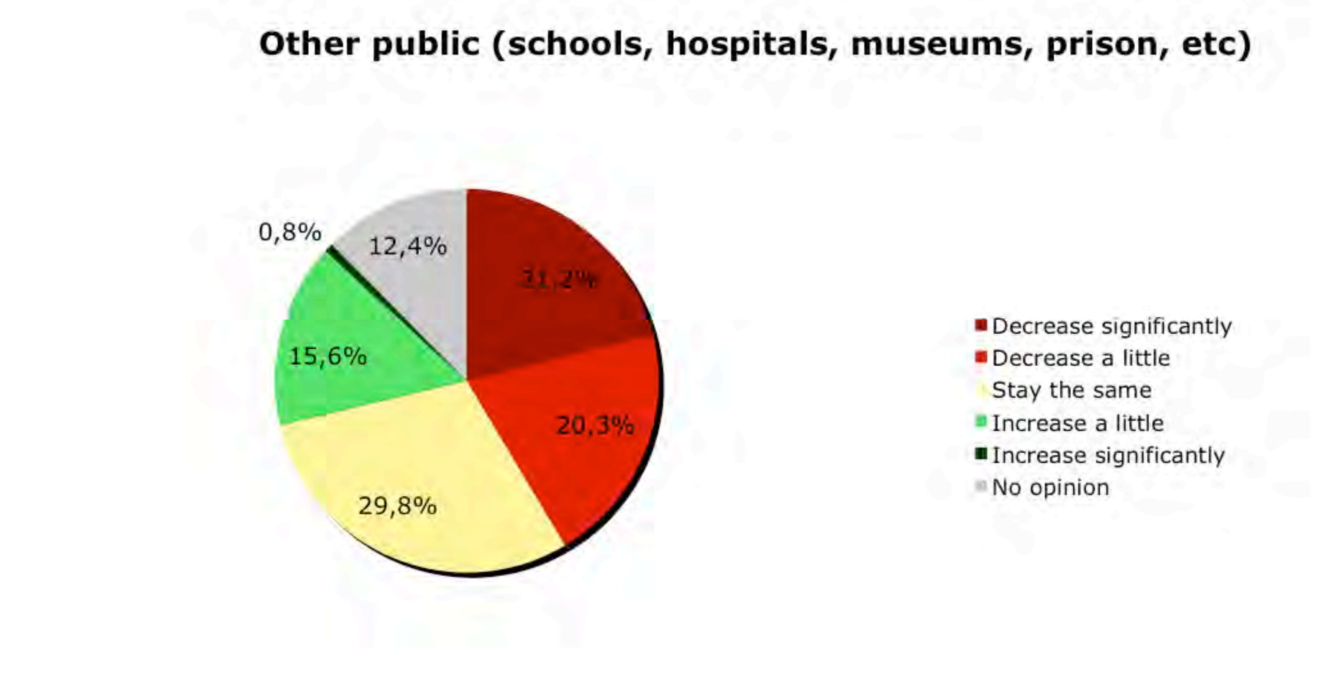
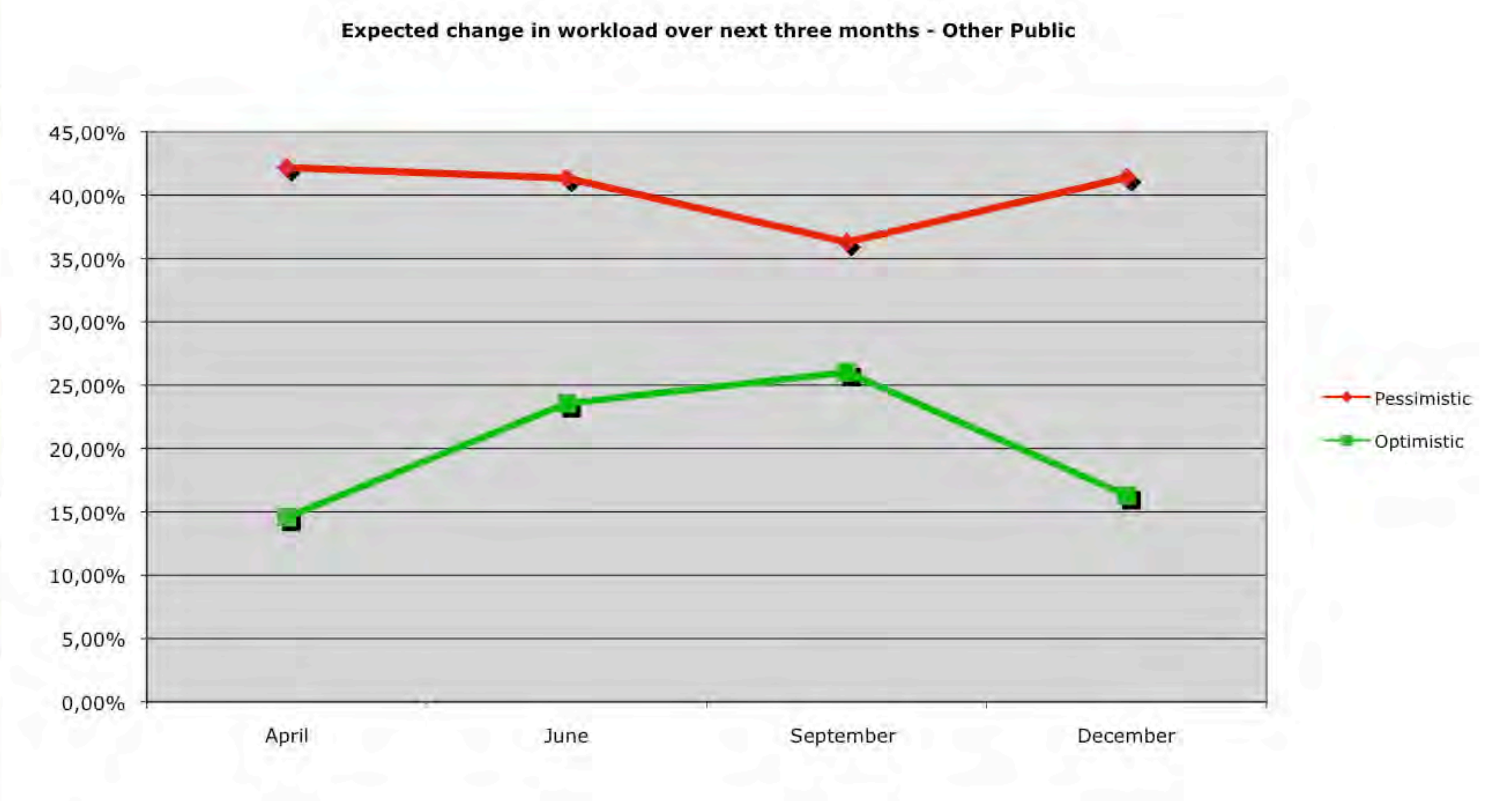
Expected Change in Workload Over Next 3 Months:



Readers are reminded that "other public" projects account for 20% of the market for architects in Europe

	Pessimistic	Optimistic
April	42,18%	14,58%
June	41,34%	23,56%
September	36,29%	26,02%
December	41,40%	16,30%

Expected Change in Workload Over Next 3 Months:



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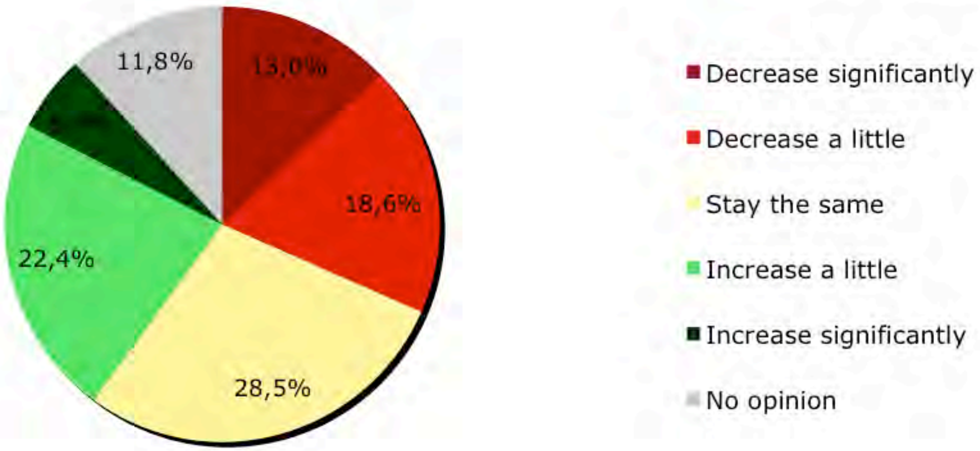
Expected Change in Workload Over Next 3 Months:

Other (consultancy, energy audits, feasibility studies, etc)



	Pessimistic	Optimistic
April	47,38%	16,51%
June	34,05%	24,07%
September	30,47%	23,14%
December	31,60%	28,20%

It is not known what the percentage of the market for architects these tasks represent, but it remains the area that represents the least pessimism about future workloads

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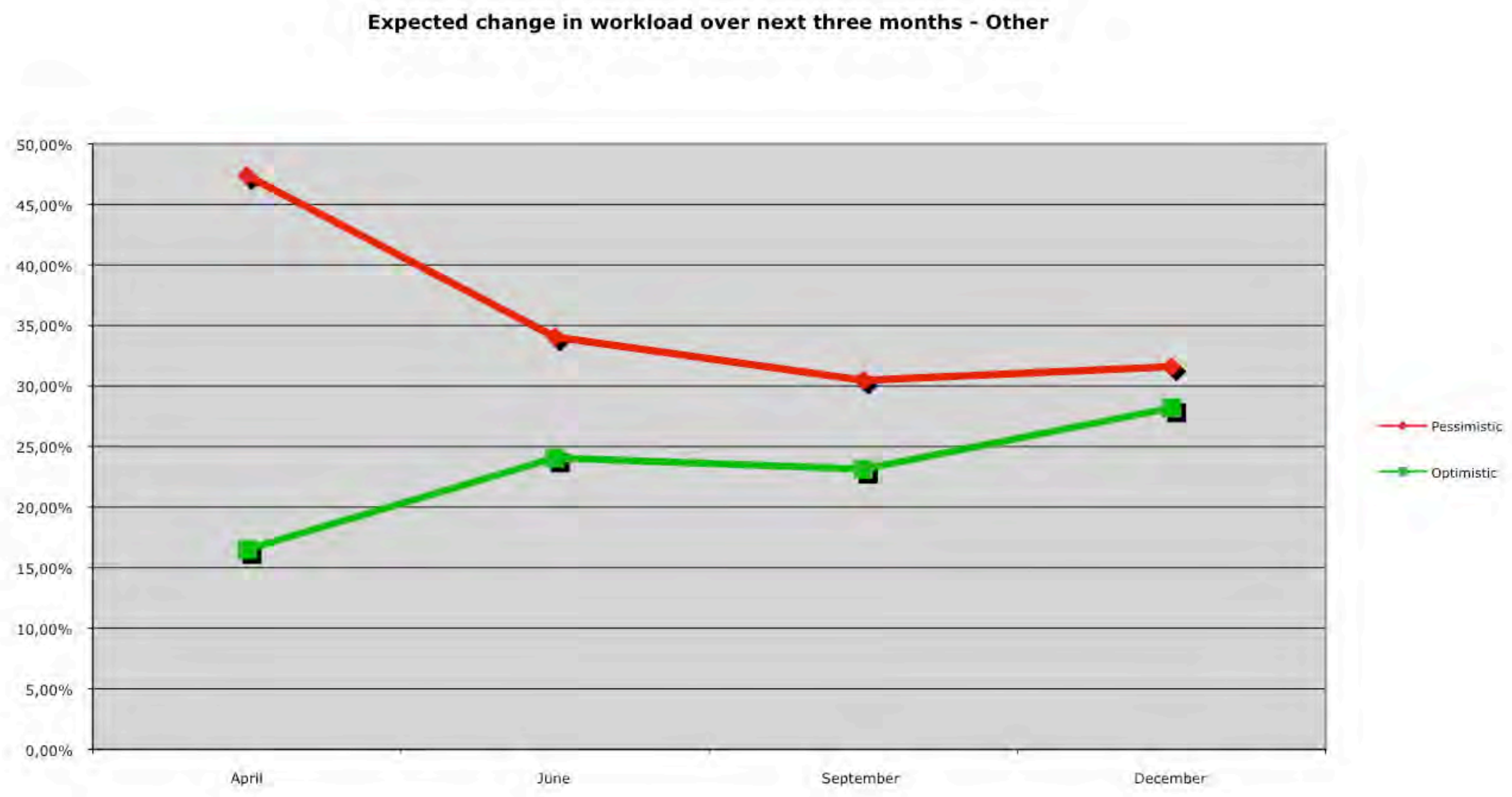
Expected Change in Workload Over Next 3 Months:



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Conclusions:

- Important to continue to repeat the survey every 3 months
- The architectural profession continues to be badly affected by the economic downturn
- The opinions expressed and shown in this presentation indicate that the profession is not seeing any benefit from the promise of many governments to increase spending on public projects
- In fact there was more optimism at the end of the year but, given the increased pessimism about the public sector, it is still possible that the worst is still ahead