ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

March 2009

Fifth Snapshot Survey Of Impact of Economic Crisis

Methodology:

- Secretariat Used the Same Questions as Used in Previous Surveys and the ACE Internet Service Provider Created the Online Questionnaire
- Questions Translated into 16 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 29th of March 2009)
- 3,753 Responses from ACE Member Countries
- All results are weighted to give more Statistical Reliability

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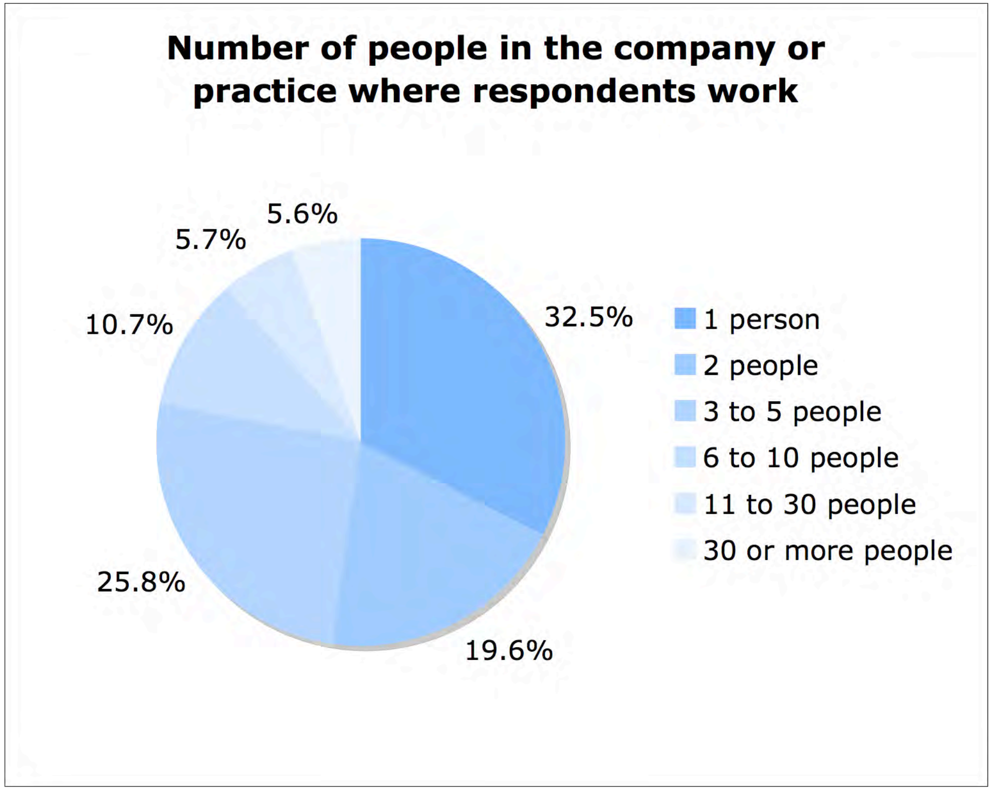
Breakdown of Responses:

Country	Answers in April 2009	Answers in June 2009	Answers in September 2009	Answer in December 2009	Answer in March 2010
France	17	1736	1508	1652	1374
Irlande	13	91	354	14	21
Romania	36	315	296	210	198
Germany	75	127	208	87	112
Bulgaria	0	17	170	96	105
Greece	235	216	162	180	281
Czech Republic	128	55	151	67	57
Turkey	37	130	147	123	203
Poland	12	18	54	53	59
United Kingdom	21	27	32	22	27
Belgium	995	630	31	39	443
Finland	210	32	30	17	5
Austria	18	7	24	19	18
Croatia	0	126	24	5	5
Spain	1	21	18	600	678
Portugal	17	75	17	80	14
Sweden	17	51	16	12	14

Country	Answers in April 2009	Answers in June 2009	Answers in September 2009	Answer in December 2009	Answer in March 2010
Denmark	13	92	13	14	7
Latvia	25	22	12	22	1
Malta	33	13	11	15	3
Slovenia	9	9	11	92	61
Netherlands	10	7	9	14	10
Italy	1	83	8	39	13
Switzerland	1	6	7	3	3
Hungary	0	121	5	0	3
Luxembourg	11	12	5	9	6
Cyprus	3	3	0	0	1
Estonia	25	23	0	39	26
FYROM	1	0	0	3	2
Lithuania	0	37	0	35	2
Norway	83	2	0	2	1
Slovakia	0	0	0	28	0
Bosnia & Herzegovina	0	2	0	0	0
TOTAL	2047	4106	3323	3591	3753

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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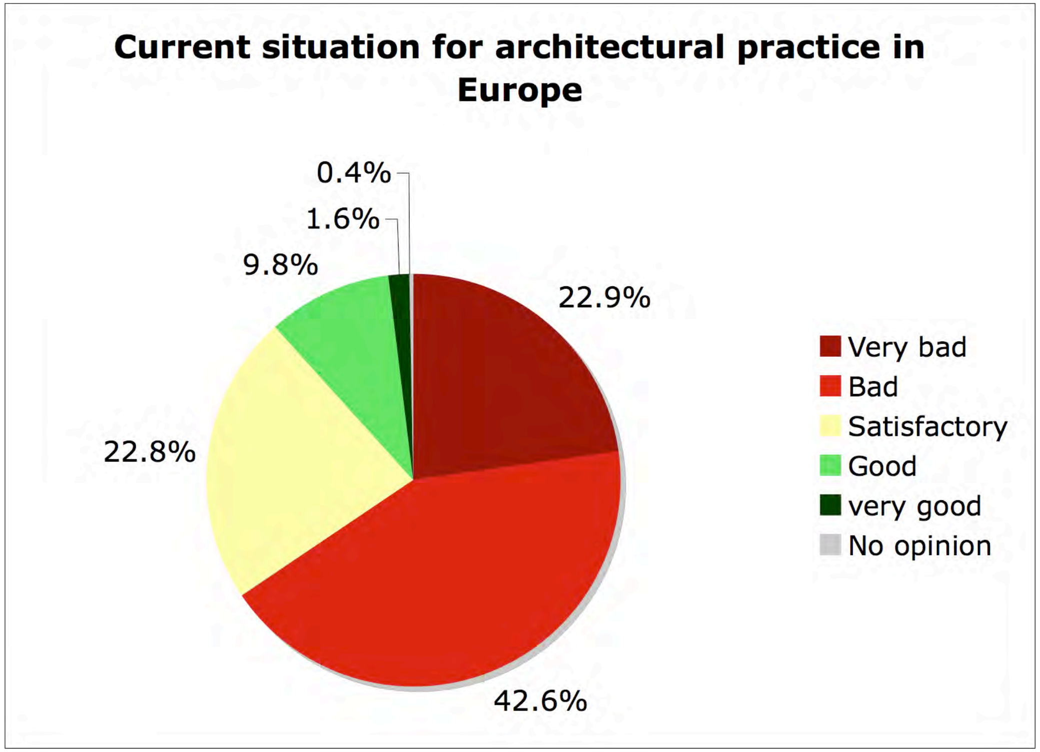

	Pessimistic	Optimistic
April '09	65.16%	8.41%
June '09	58.55%	12.67%
Sept '09	56.03%	13.21%
Dec '09	58.40%	15.10%
Mar '10	65.50%	11.40%

Level of Optimism has Fallen Significantly since December '09 to Almost Match the Worst of the Earlier Results

Survey to be Repeated Throughout 2010 to Extend Trend Analysis

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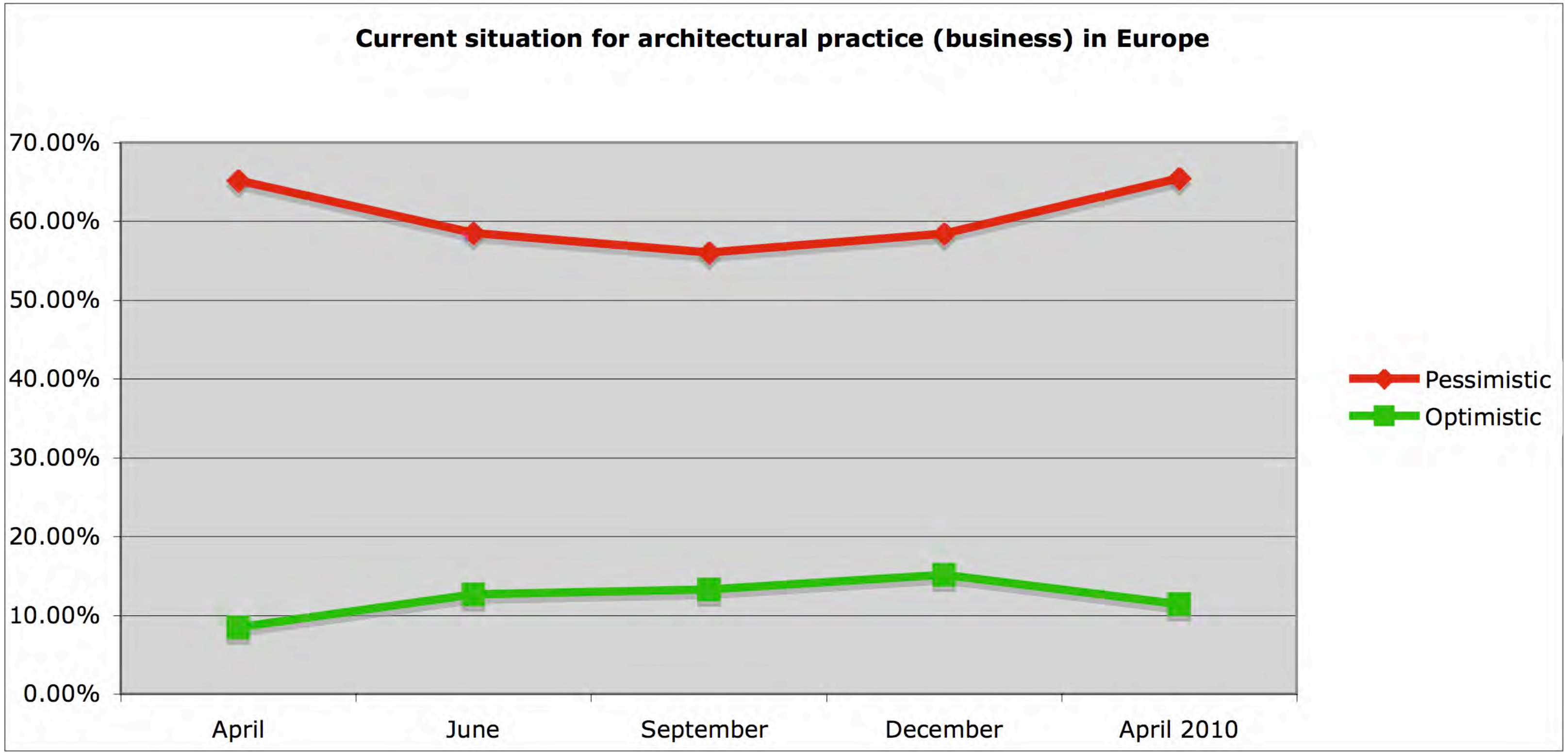
Current Situation for Architectural Practice in Europe



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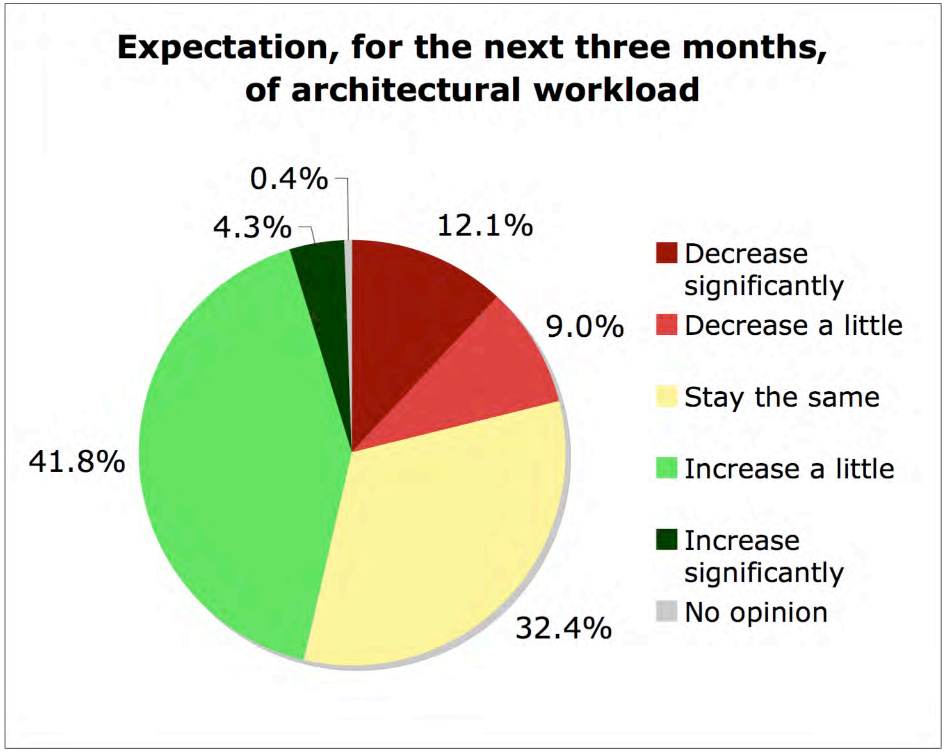

	Decrease	increase
April '09	48.47%	13.09%
June '09	39.60%	20.11%
Sept '09	32.30%	24.49%
Dec '09	32.80%	22.40%
Mar '10	21.10%	46.10%

Breakdown by Building Type Comes Later in the Presentation

Expectations for an Increase are Greater than at any Time Since the Start of the Crisis

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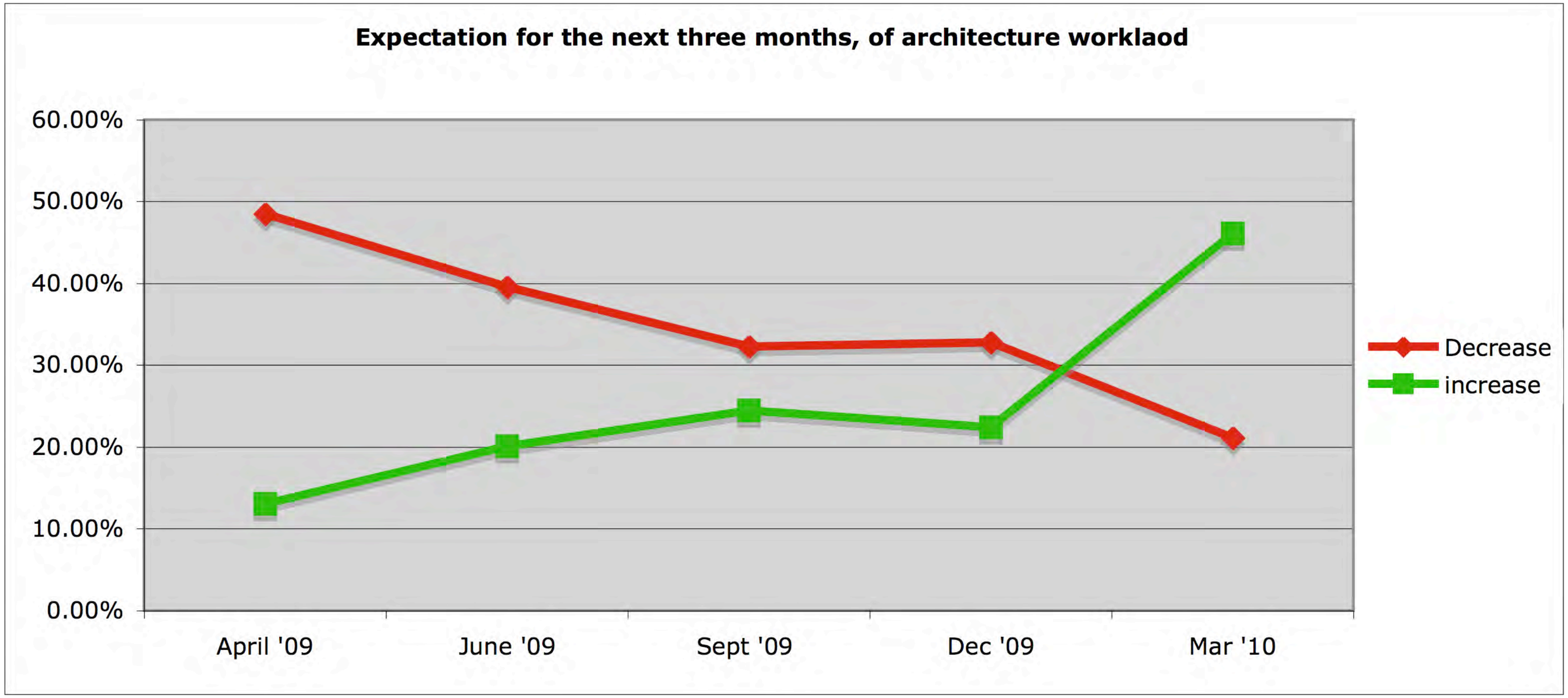
Expectation, for the next three months, of Architecture Workload



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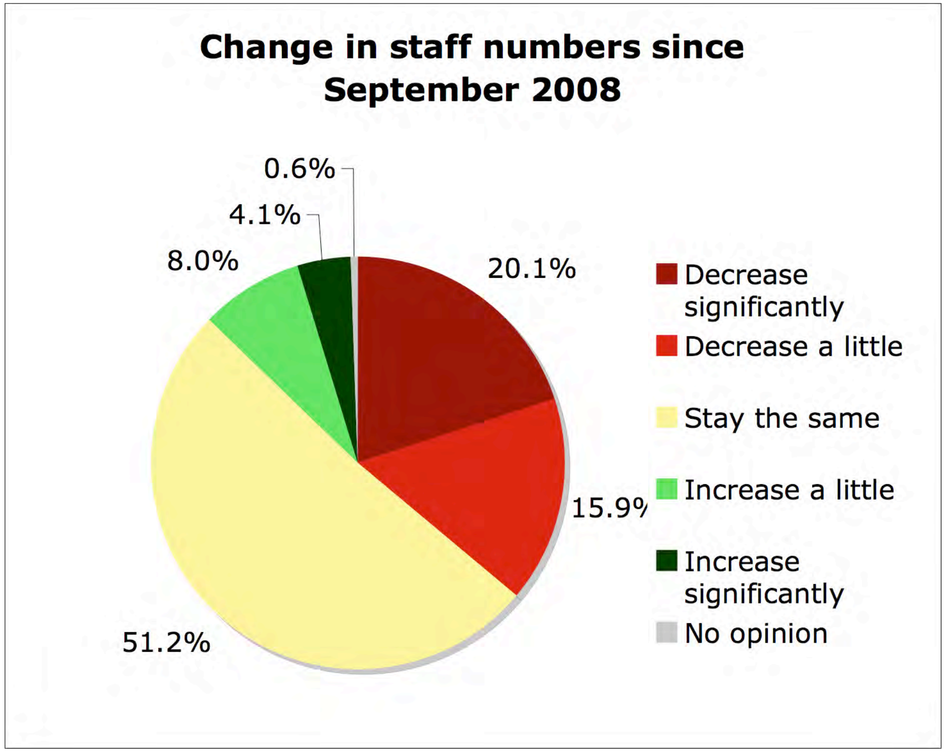

	Decrease	increase
April '09	37.18%	6.85%
June '09	53.60%	11.36%
Sept '09	37.49%	12.12%
Dec '09	40.90%	15.20%
Mar '10	36.10%	12.10%

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

From these answers we can see that 36% of architects offices have seen a decrease in staff numbers since September 2008

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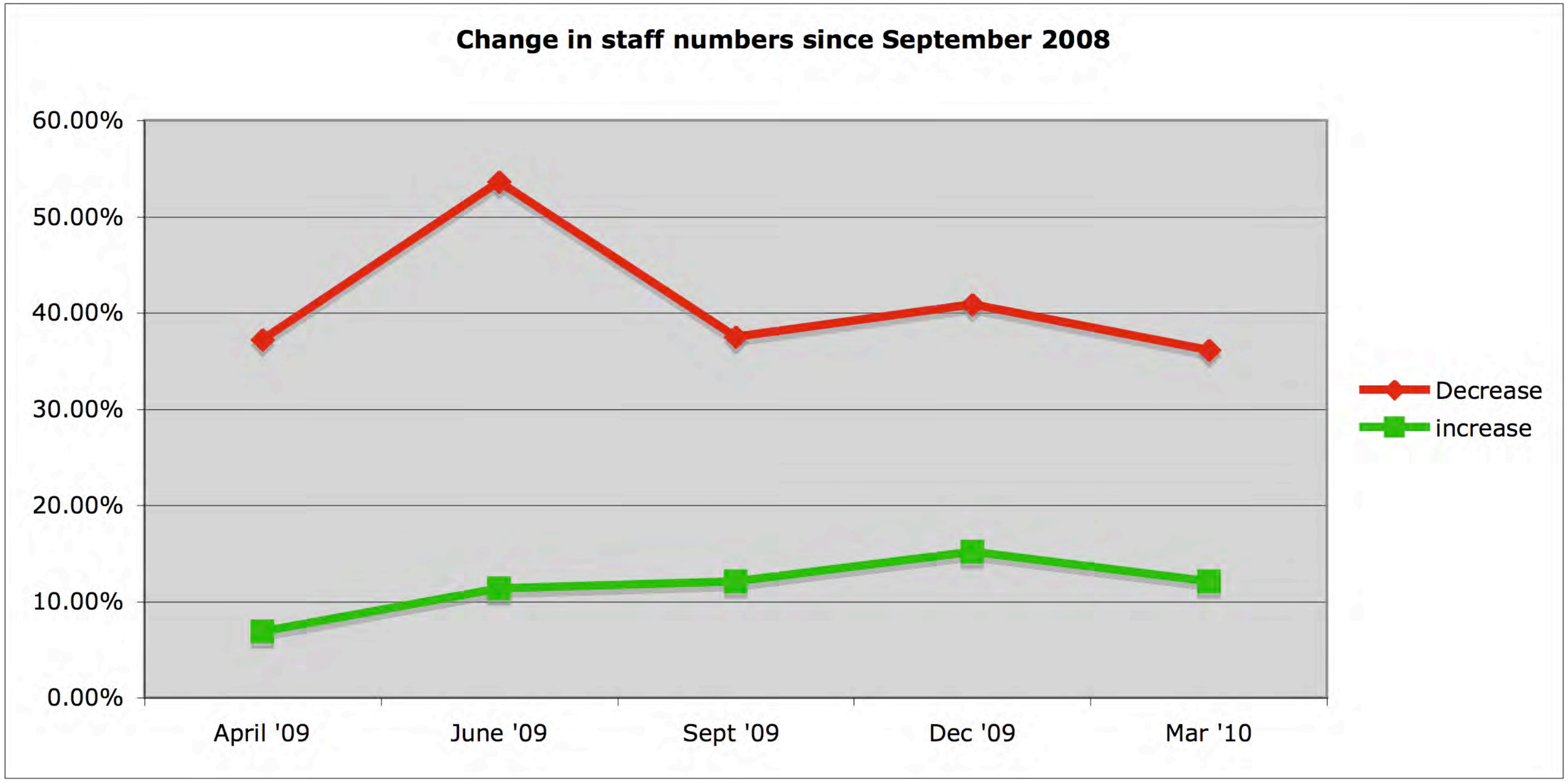
Change in Staff Numbers since September 2008



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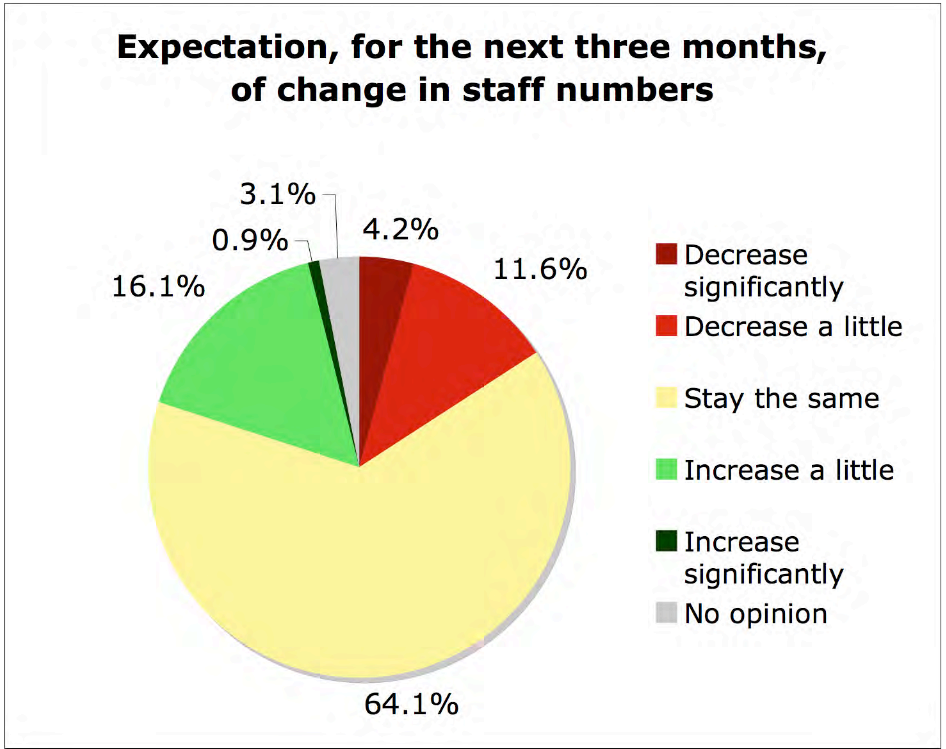

	Decrease	increase
April '09	32.35%	6.15%
June '09	23.60%	12.90%
Sept '09	21.07%	12.25%
Dec '09	17.00%	13.20%
Mar '10	15.80%	17.00%

From this pie chart we can see that, overall, staff numbers will decrease in 16% of architects offices in the coming three months.

For the first time we see that the number of offices expecting to see an increase in staff numbers is greater than the number expecting a decrease.

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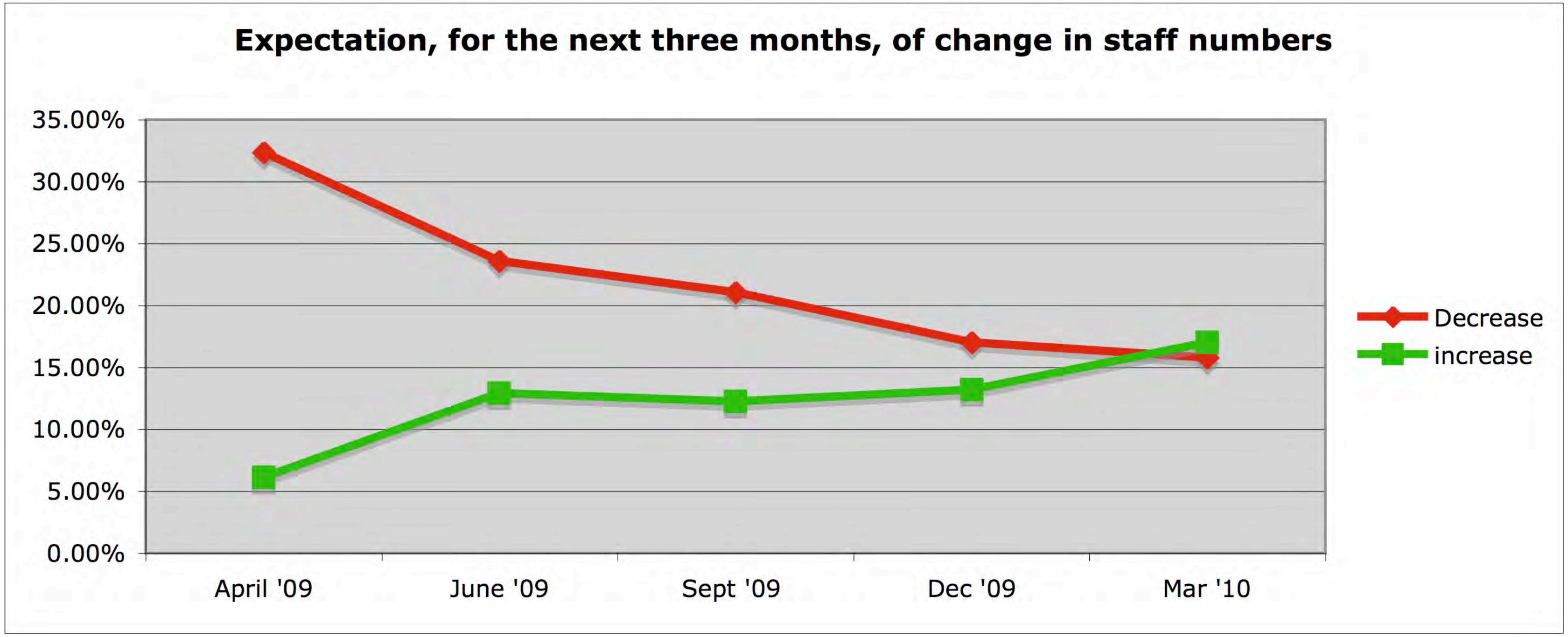
Expectation, for the next three months, of Change in Staff Numbers



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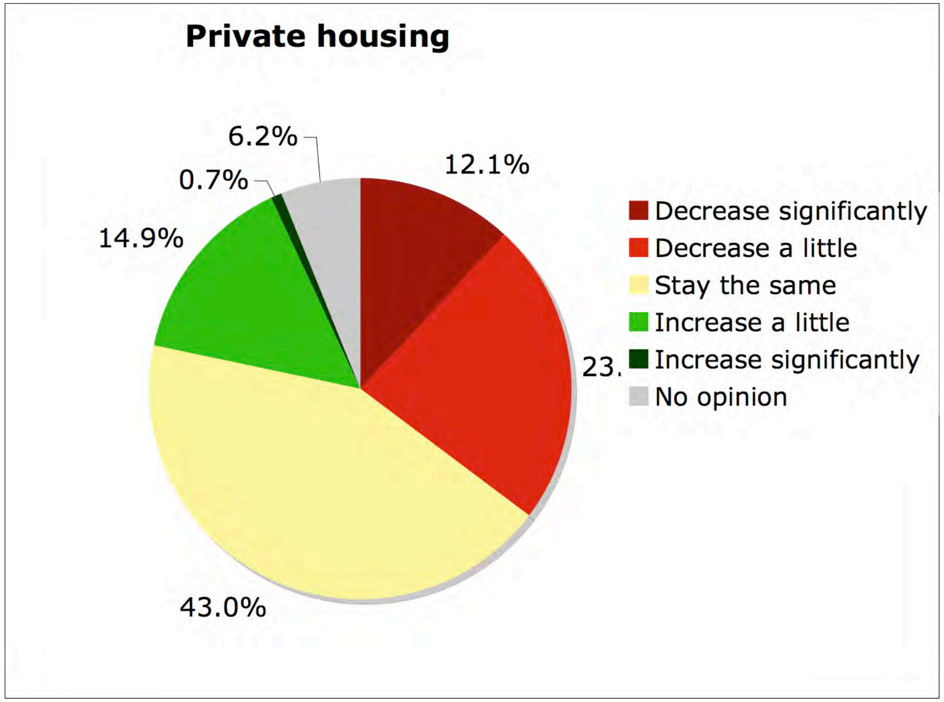
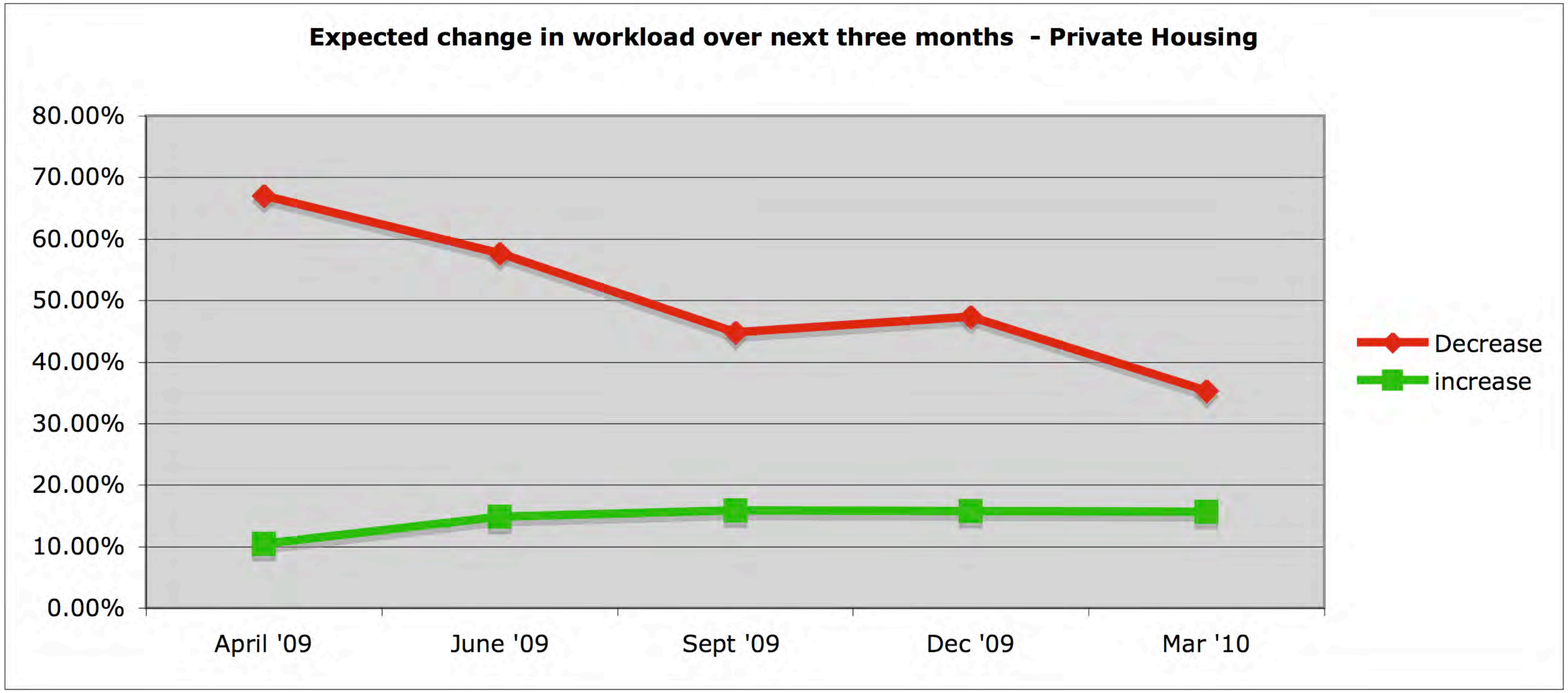
Expected Change in Workload Over Next 3 Months: Private Housing



	Decrease	increase
April '09	67.04%	10.44%
June '09	57.60%	14.87%
Sept '09	44.84%	15.88%
Dec '09	47.30%	15.70%
Mar '10	35.30%	15.60%

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

Expected Change in Workload Over Next 3 Months: Private Housing



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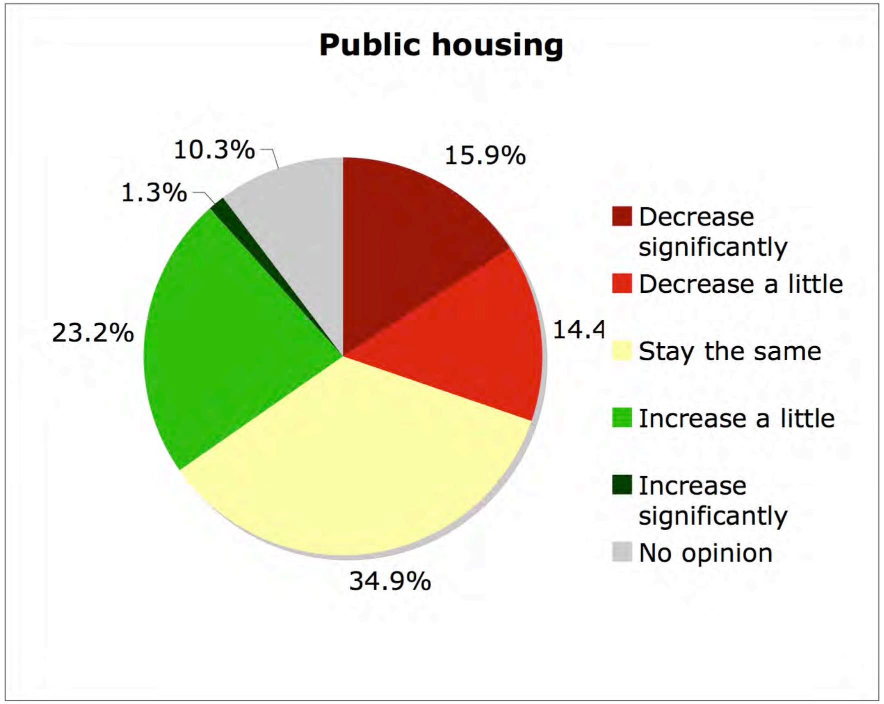
Expected Change in Workload Over Next 3 Months: Public Housing



	Decrease	increase
April '09	59.78%	9.73%
June '09	49.90%	15.31%
Sept '09	42.75%	17.31%
Dec '09	48.30%	9.80%
Mar '10	30.30%	24.50%

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

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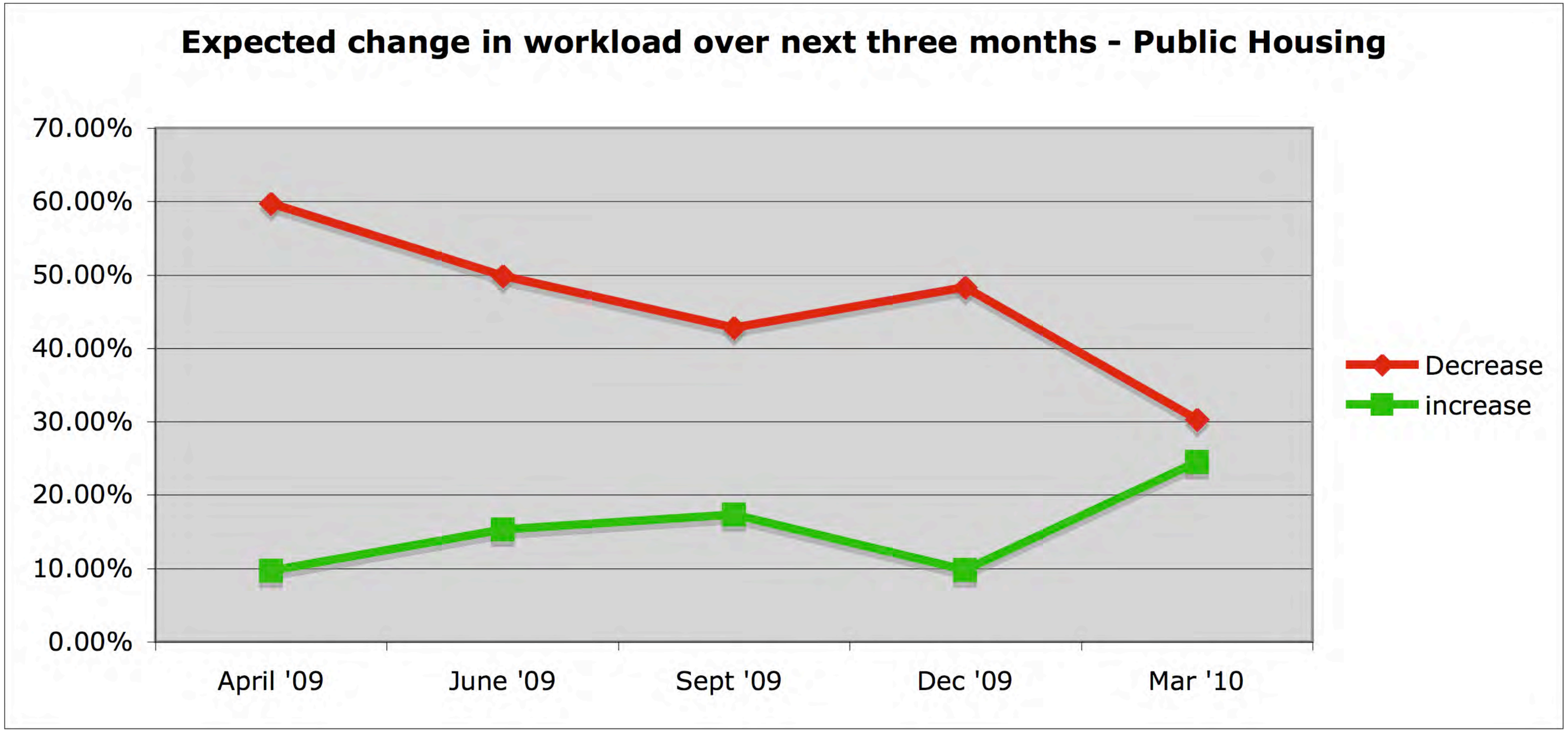
Expected Change in Workload Over Next 3 Months: Public Housing



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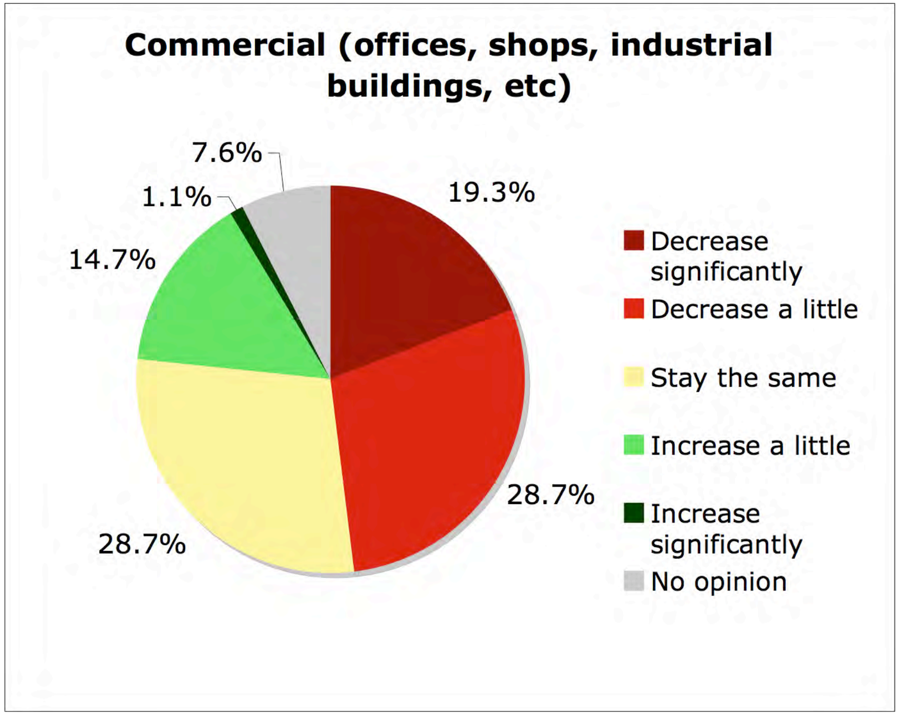
Expected Change in Workload Over Next 3 Months: Commercial



	Decrease	increase
April '09	76.19%	5.18%
June '09	62.87%	10.08%
Sept '09	53.71%	11.56%
Dec '09	57.80%	9.50%
Mar '10	48.00%	15.80%

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

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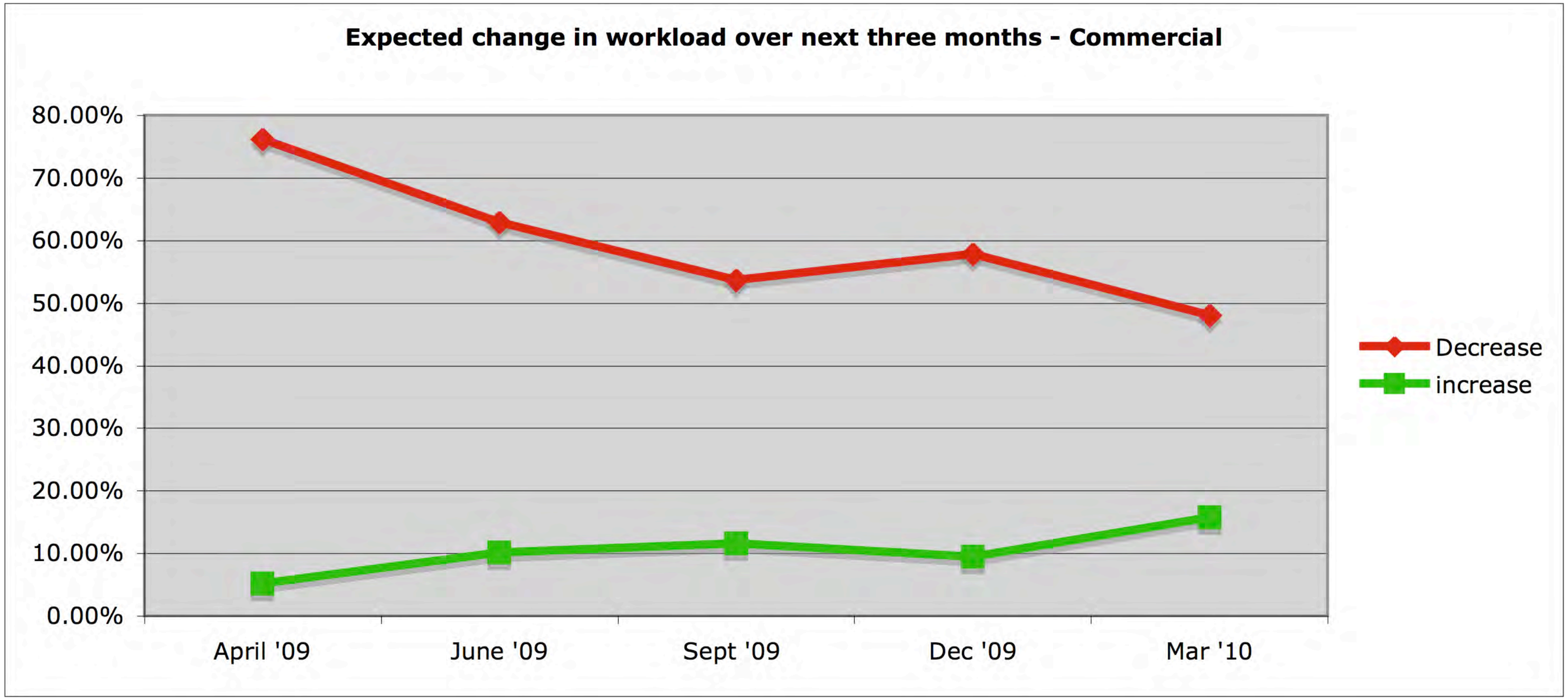
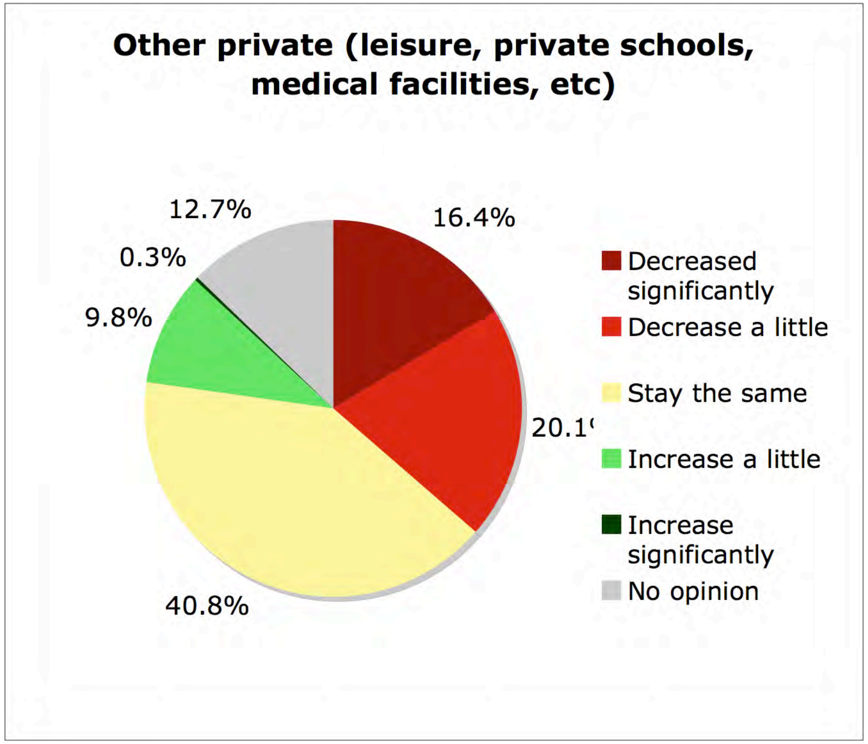
Expected Change in Workload Over Next 3 Months: Commercial



Expected Change in Workload Over Next 3 Months: Other Private



	Decrease	increase
April '09	62.07%	3.12%
June '09	58.16%	11.05%
Sept '09	43.12%	14.06%
Dec '09	48.50%	11.40%
Mar '10	36.50%	10.00%

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

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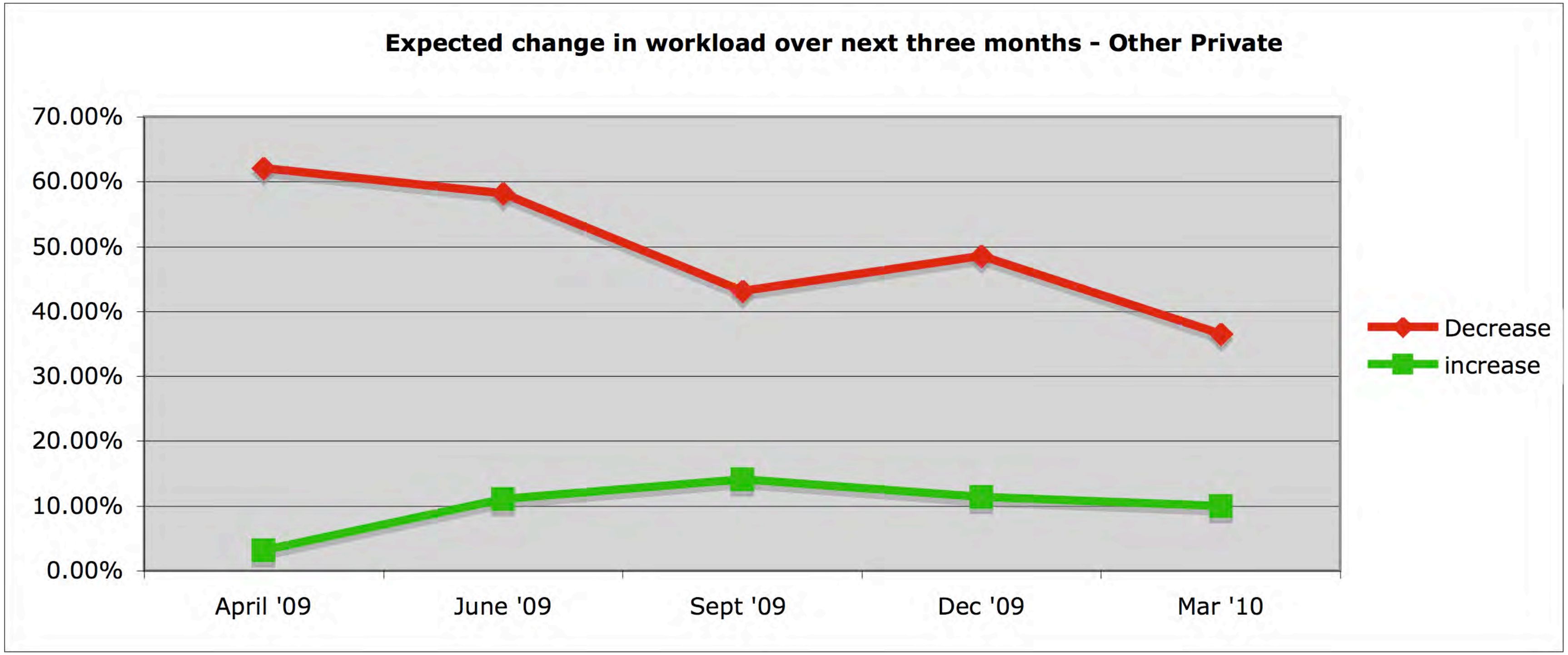
Expected Change in Workload Over Next 3 Months: Other Private



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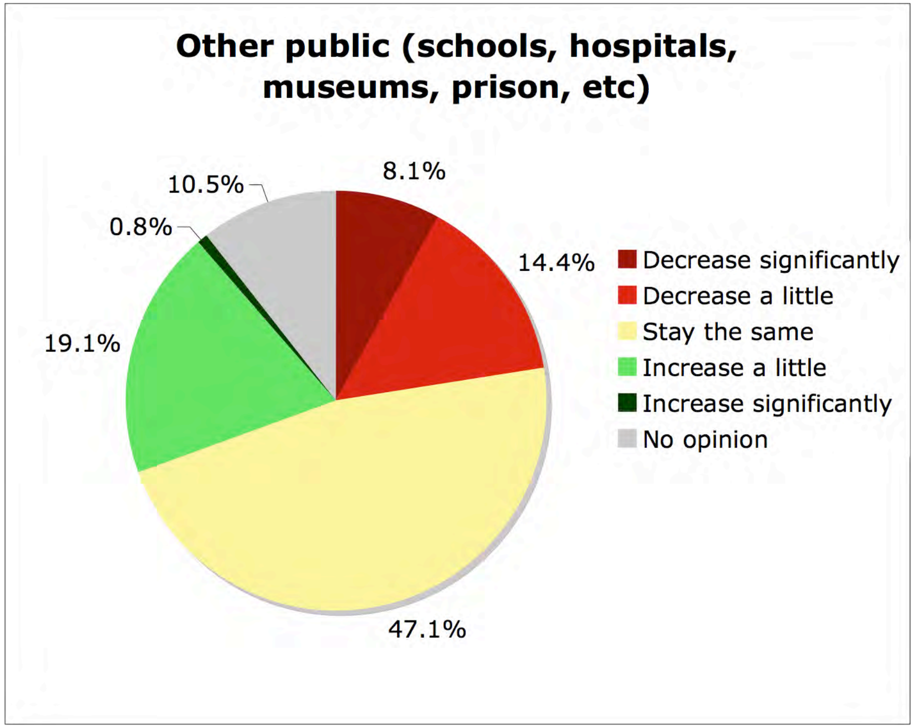
Expected Change in Workload Over Next 3 Months: Other Public



	Decrease	increase
April '09	42.18%	14.58%
June '09	41.34%	23.56%
Sept '09	36.29%	26.02%
Dec '09	41.40%	16.30%
Mar '10	22.40%	19.90%

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

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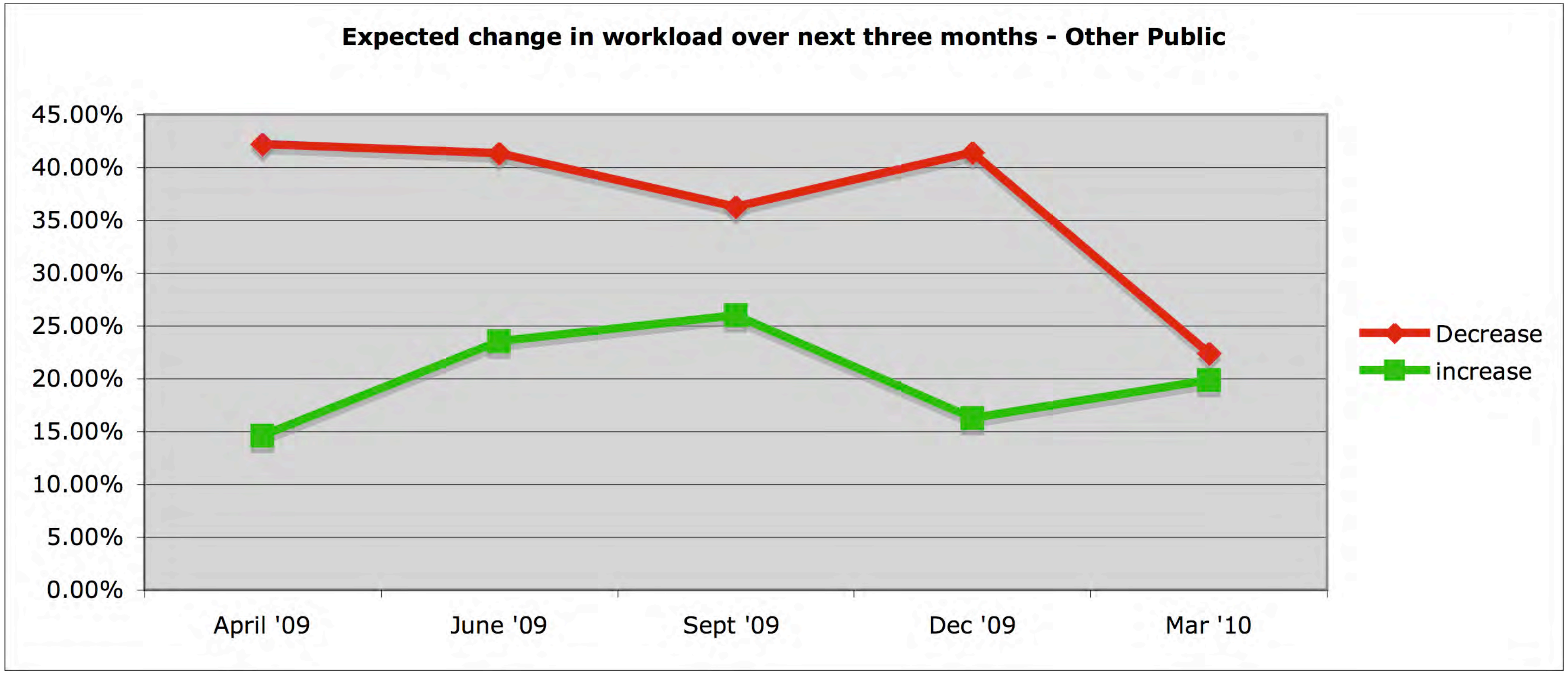
Expected Change in Workload Over Next 3 Months: Other Public



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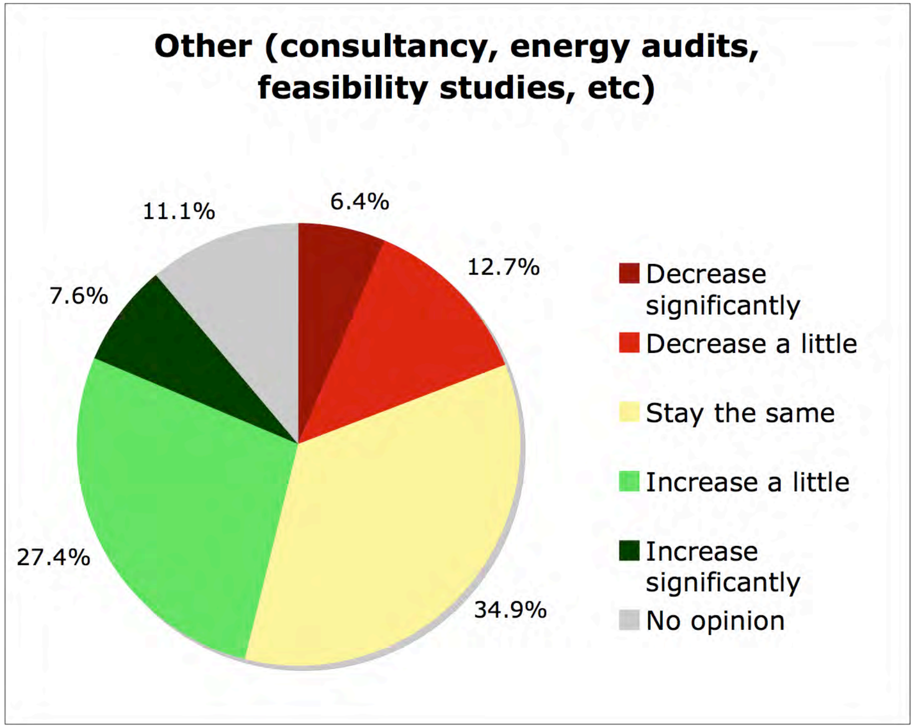
Expected Change in Workload Over Next 3 Months: Other



	Decrease	increase
April '09	47.38%	16.51%
June '09	34.05%	24.07%
Sept '09	30.47%	23.14%
Dec '09	31.60%	28.20%
Mar '10	19.10%	34.90%

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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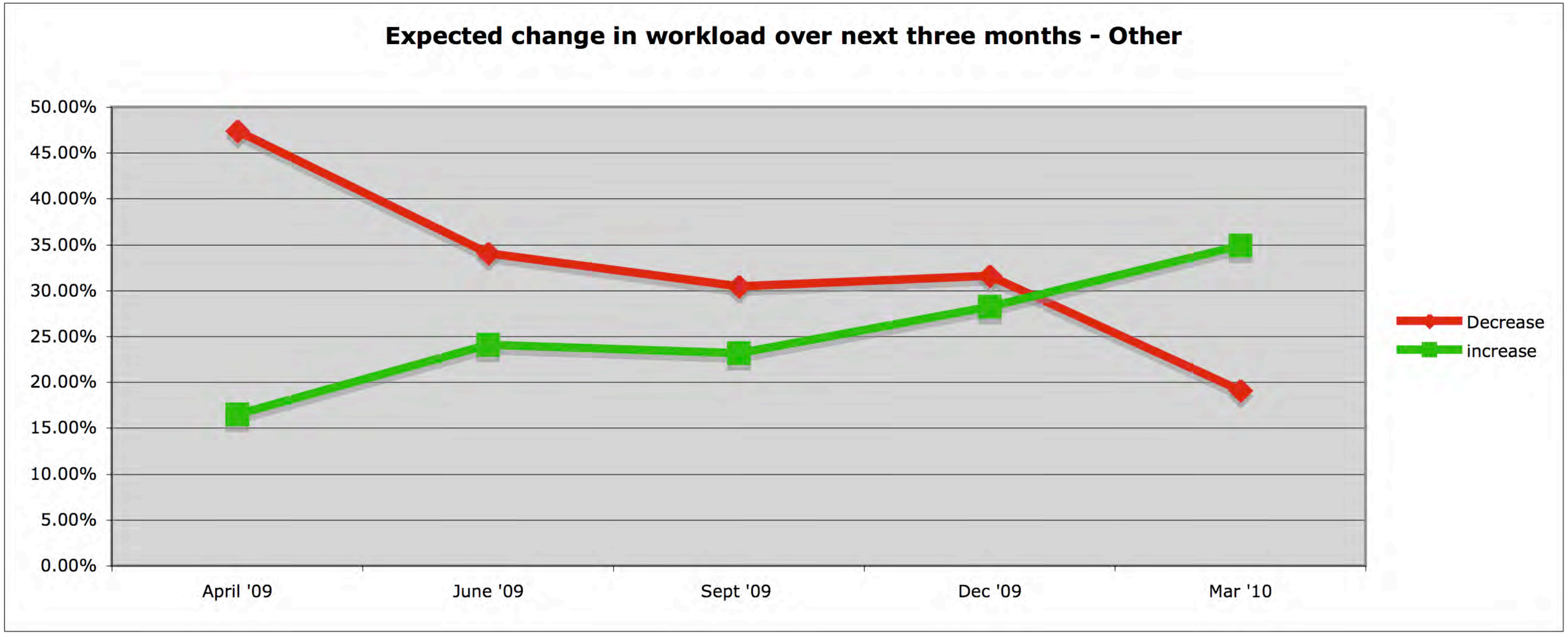
Expected Change in Workload Over Next 3 Months: Other



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Conclusions:

- **The opinions expressed and shown in this presentation indicate that the architectural profession is beginning to feel slightly more optimistic about future workload although…**
- **…There is more pessimism about the overall situation than at the end of 2009 with the current figure (60.5% pessimistic) higher than at any time since the ACE started these surveys**

- **Important to continue to repeat the survey every 3 months**
- **The architectural profession continues to be badly affected by the economic downturn**