ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

January 2012

Ninth Snapshot Survey of the Impact of Economic Downturn

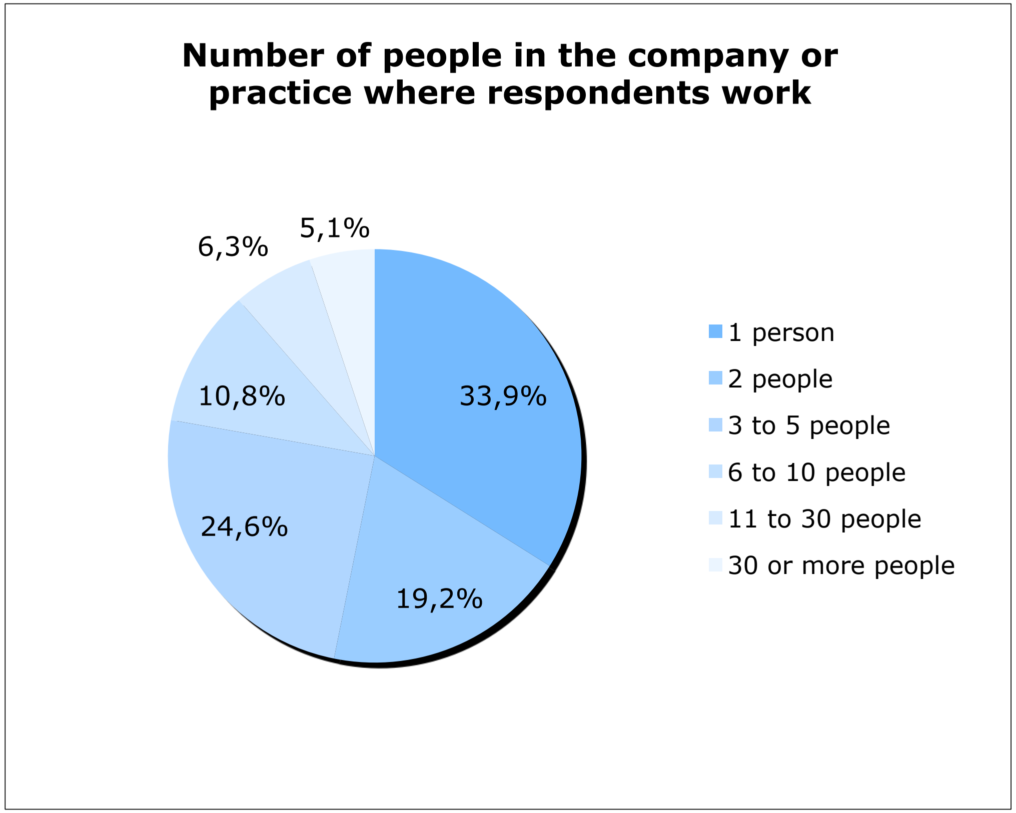
Breakdown of Responses:

Country	Answers in June 2009	Answers in December 2009	Answers in June 2010	Answers in December 2010	Answers in June 2011	Answers in January 2012
Austria	7	19	4	9	12	10
Belgium	630	39	336	48	352	26
Bosnia & Herzegovina	2	0	1	0	0	0
Bulgaria	17	96	75	164	251	256
Croatia	126	5	251	28	133	182
Cyprus	3	0	4	2	2	5
Czech Republic	55	67	134	224	216	10
Denmark	92	14	23	14	16	23
Estonia	23	39	17	1	2	12
Finland	32	17	12	18	22	11
France	1736	1652	1058	874	1049	1357
FYROM	0	3	1	1	0	1
Germany	127	87	429	90	12	25
Greece	216	180	225	321	265	414
Hungary	121	0	2	2	1	3
Ireland	91	14	216	43	266	68
Italy	83	39	16	12	14	25

Breakdown of Responses:

Country	Answers in June 2009	Answers in December 2009	Answers in June 2010	Answers in December 2010	Answers in June 2011	Answers in January 2012
Latvia	22	22	12	21	16	3
Lithuania	37	35	33	46	25	12
Luxembourg	12	9	5	4	60	6
Malta	13	15	21	1	0	0
Netherlands	7	14	36	16	5	12
Norway	2	2	0	75	2	10
Poland	18	53	35	312	48	507
Portugal	75	80	10	10	2	322
Romania	315	210	210	220	149	50
Slovakia	0	28	1	2	2	5
Slovenia	9	92	4	75	52	12
Spain	21	600	12	244	12	224
Sweden	51	12	13	38	24	37
Switzerland	6	3	6	4	4	3
Turkey	130	123	128	838	543	27
United Kingdom	27	22	34	25	77	29
TOTAL	**4106**	**3591**	**3363**	**3782**	**3634**	**3687**

Profile of Respondents:

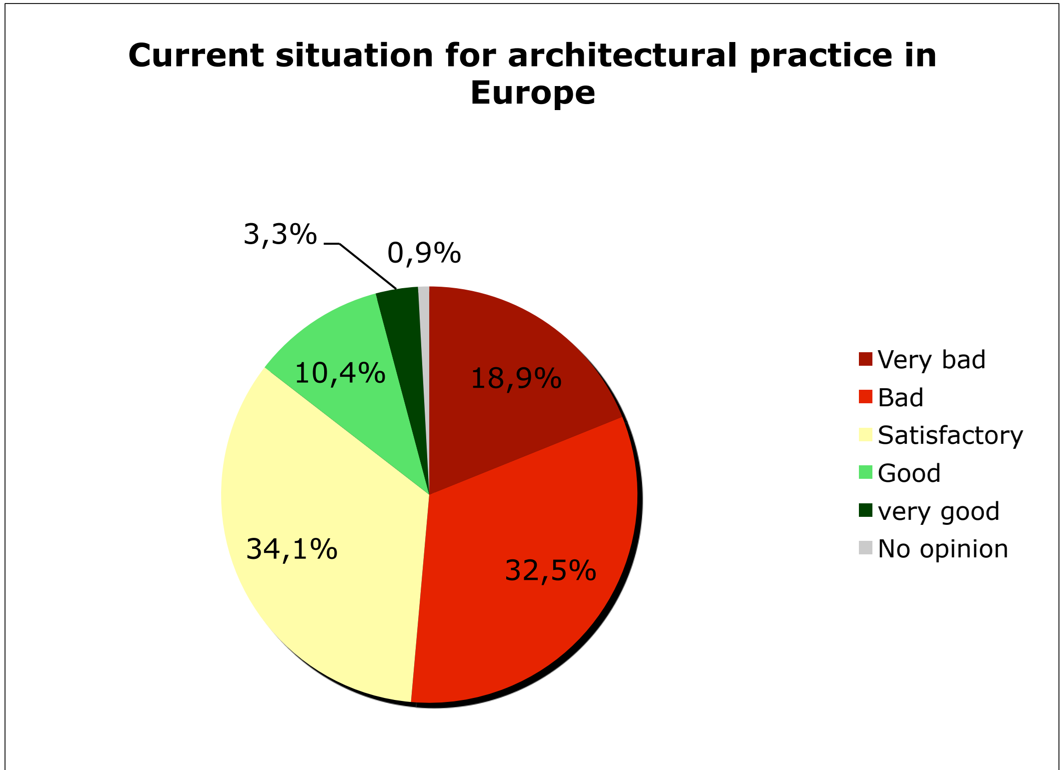


Good representation from all sizes of Architectural Practice

Spread reflects Sector Study profile well

No other information about respondents was sought

Ninth Economic Impact Survey January 2012



	Pessimistic	Optimistic
June 2009	58,55%	12,67%
December 2009	58,40%	15,10%
June 2010	44,70%	19,70%
December 2010	53,70%	14,00%
June 2011	64,40%	11,70%
January 2012	**51,40%**	**13,70%**

Level of pessimism has decreased by 13% (51,4%) and the level of optimism is a little higher (13,7%) than June 2011

Survey to be repeated in June 2012 to extend trend analysis

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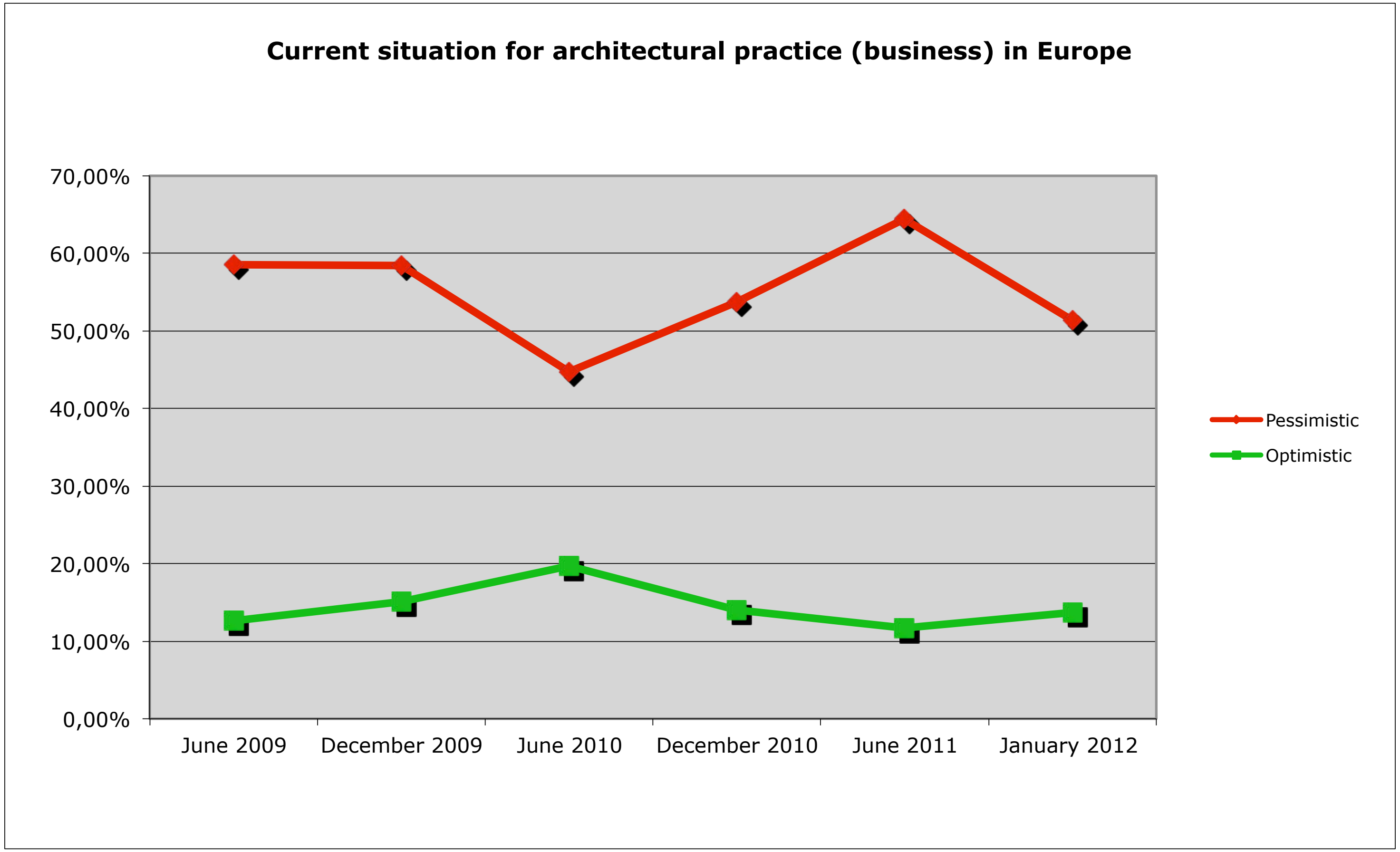
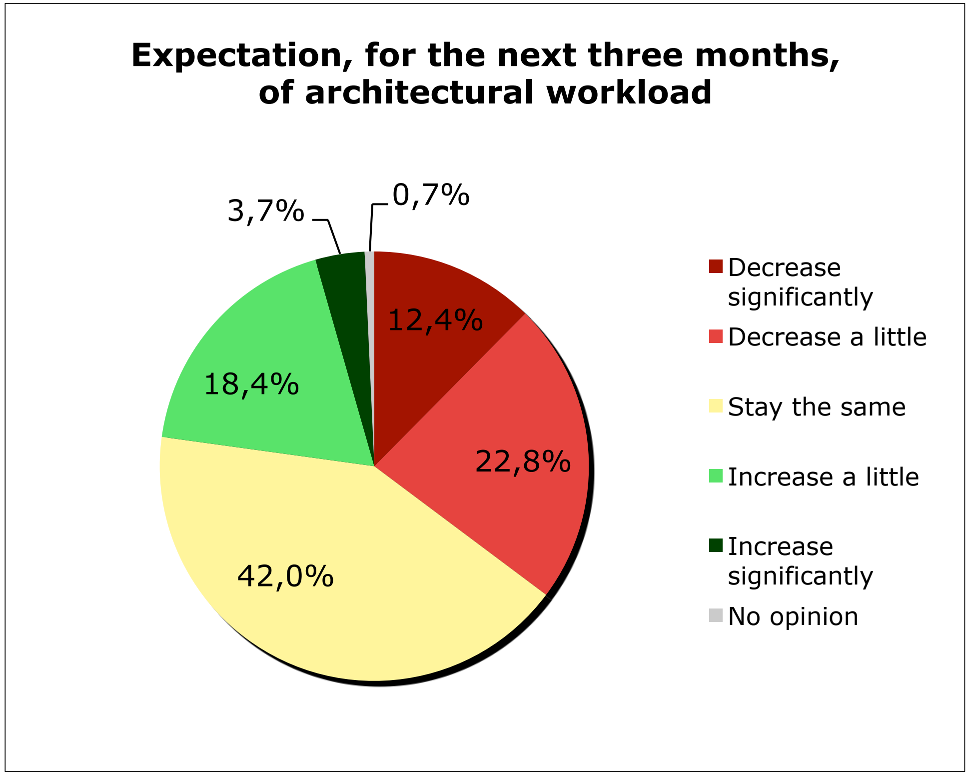
Current Situation for Architectural Practice in Europe



Ninth Economic Impact Survey

January 2012

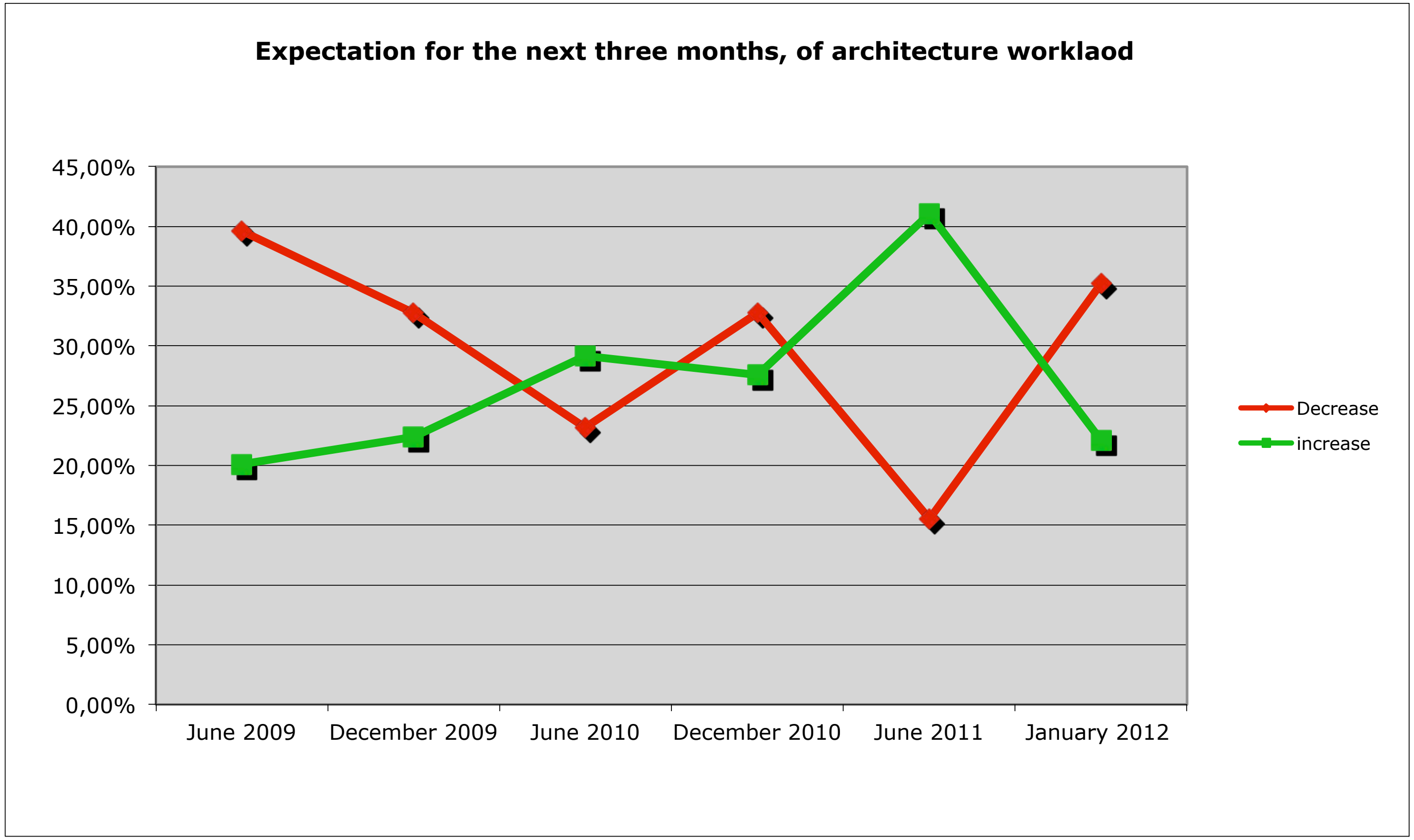


	Decrease	increase
June 2009	39,60%	20,11%
December 2009	32,80%	22,40%
June 2010	23,20%	29,20%
December 2010	32,80%	27,60%
June 2011	15,50%	41,10%
January 2012	**35,20%**	**22,10%**

Breakdown by building type comes later in the presentation

Expectations for an Increase in workload have fallen significantly since June 2011 with expectations for a decrease higher than 20%

Expectation, for the next three months, of architecture workload



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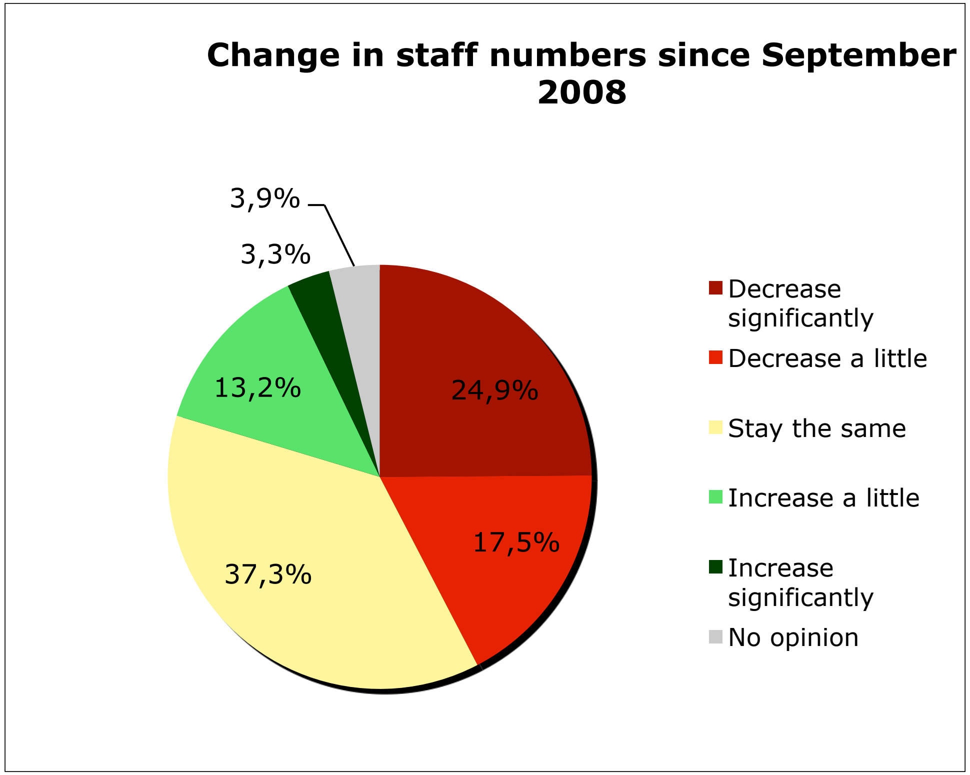
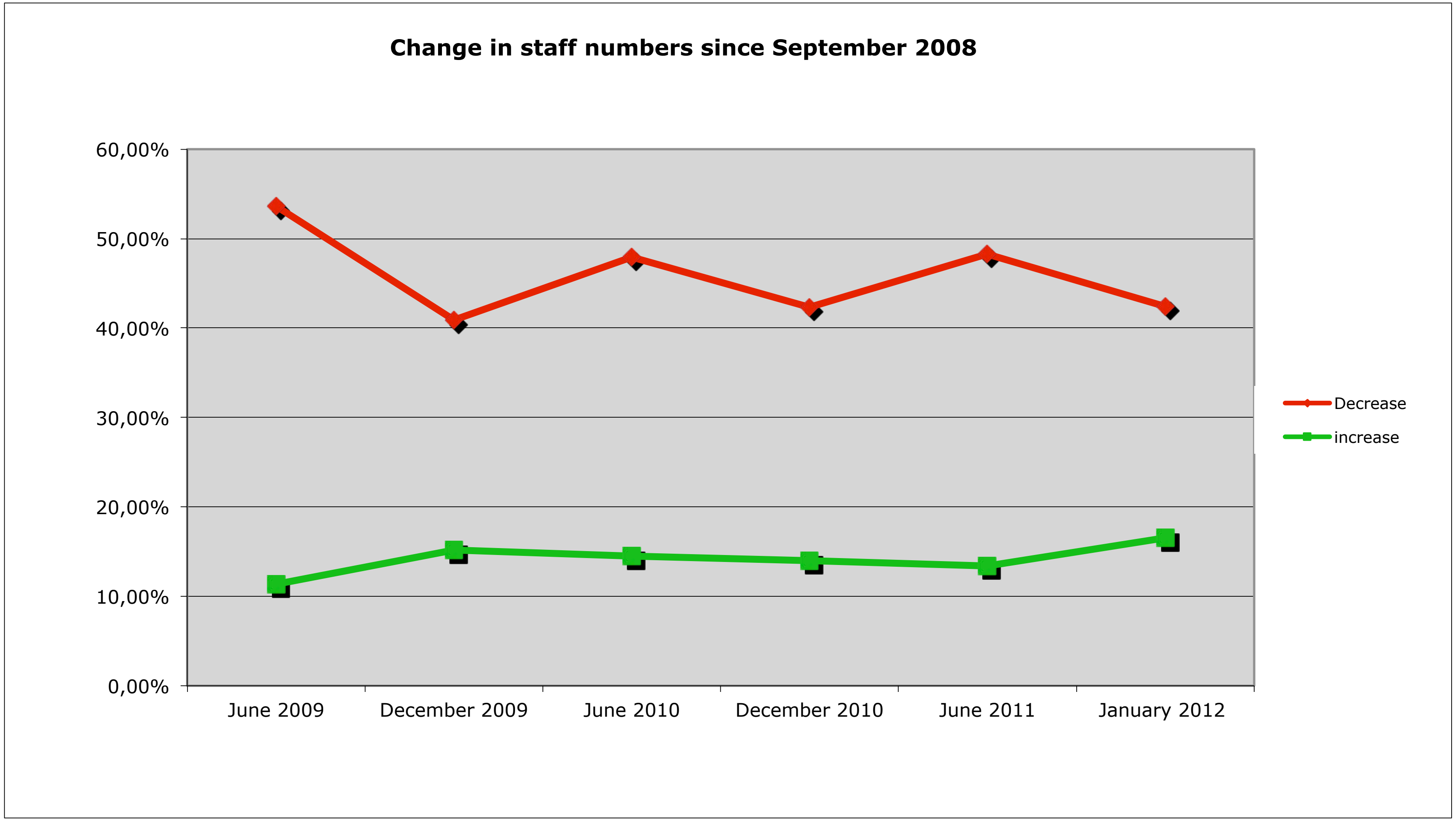


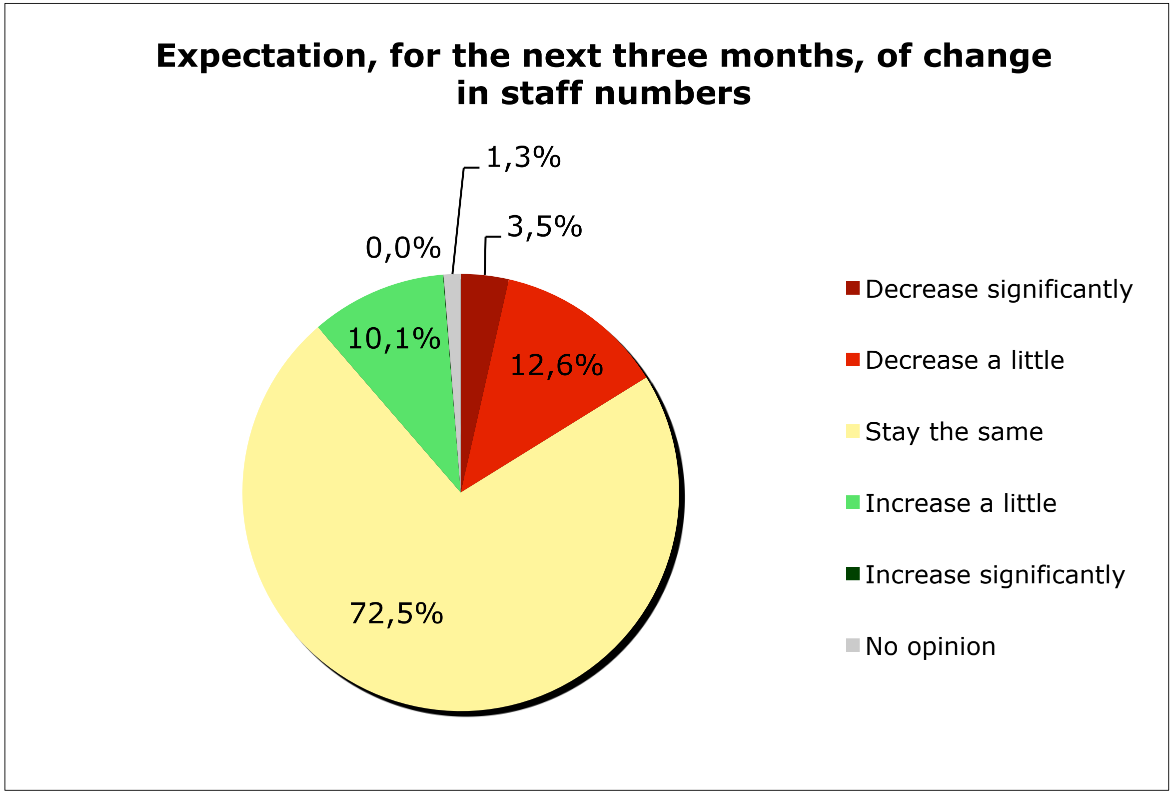
This result indicates that 1 in 3 offices has seen a decrease in staff numbers since the start of the downturn

	Decrease	increase
June 2009	53,60%	11,36%
December 2009	40,90%	15,20%
June 2010	47,90%	14,50%
December 2010	42,30%	14,00%
June 2011	48,30%	13,40%
January 2012	**42,40%**	**16,50%**

Change in Staff Numbers since September 2008



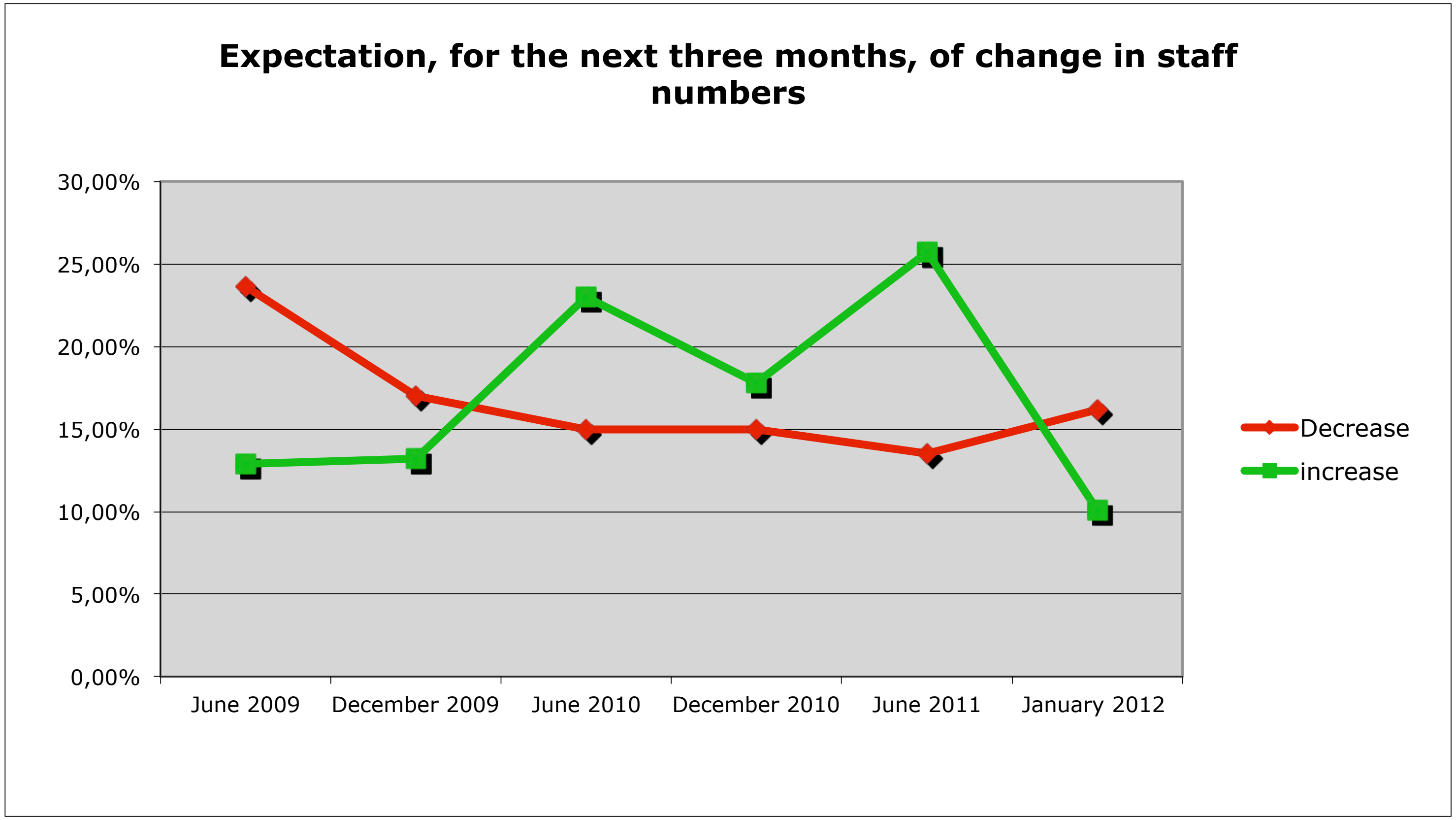
Ninth Economic Impact Survey January 2012



For the first time since December 2009 we see that the number of offices expecting to see a decrease in staff numbers is greater than the number expecting an increase.

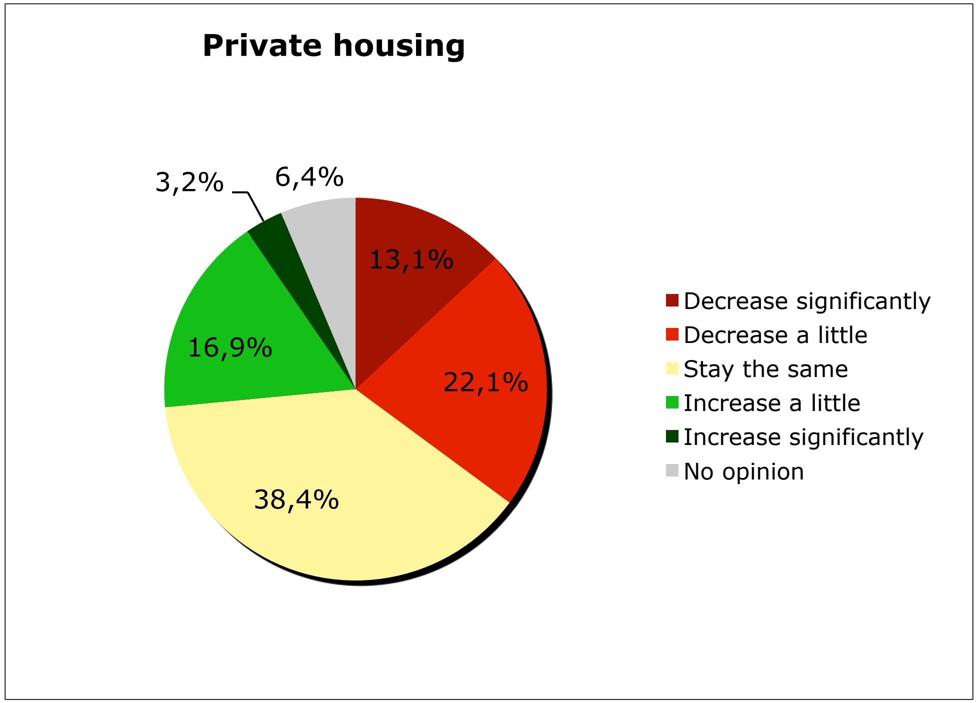
	Decrease	increase
June 2009	23,60%	12,90%
December 2009	17,00%	13,20%
June 2010	15,00%	23,00%
December 2010	15,00%	17,80%
June 2011	13,50%	25,70%
January 2012	**16,20%**	**10,10%**

Expectation, for the next three months, of change in staff numbers



Ninth Economic Impact Survey January 2012

Expected change in workload over next 3 months: Private Housing

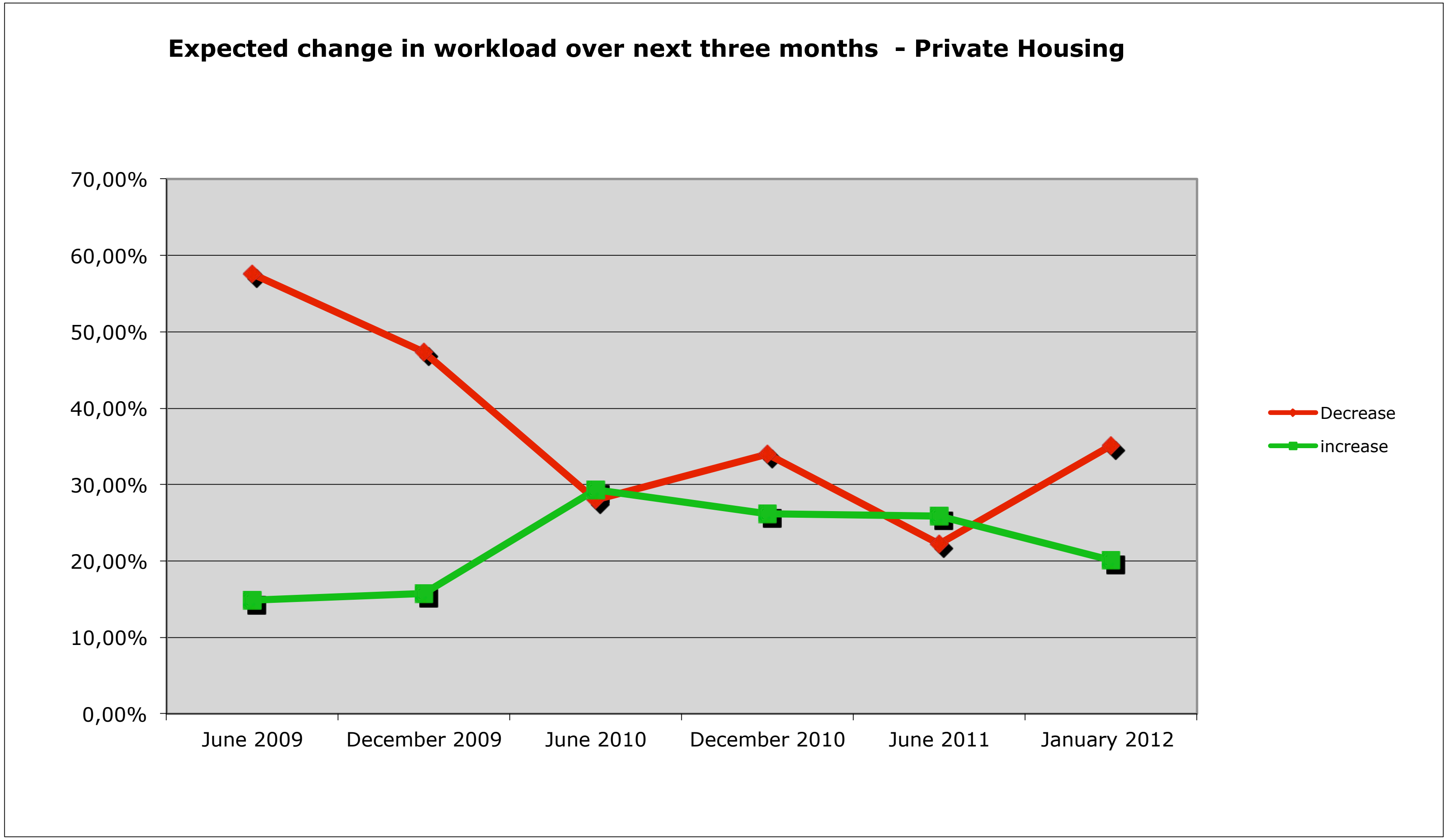


	Decrease	increase
June 2009	57,60%	14,87%
December 2009	47,30%	15,70%
June 2010	28,00%	29,30%
December 2010	34,00%	26,20%
June 2011	22,20%	25,90%
January 2012	**35,10%**	**20,10%**

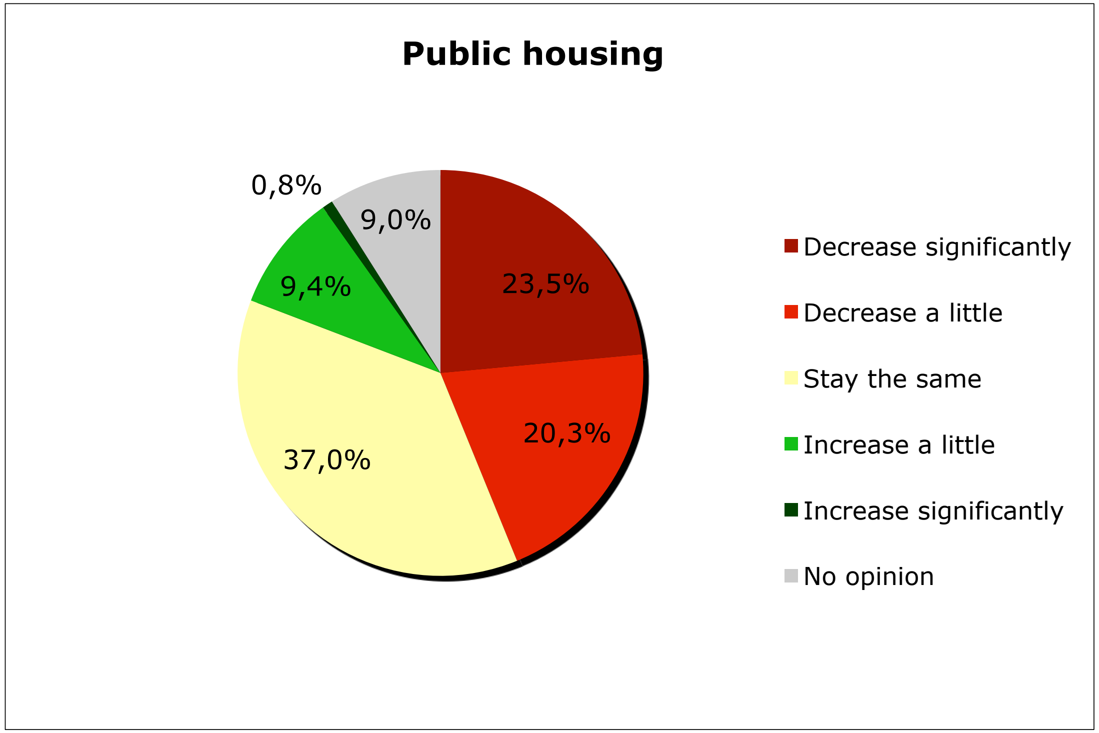
Readers are reminded that "private housing" accounts for 44% of the market for architects in Europe

The improvement expected in June 2011 for private housing was not confirmed. The number of architects expecting to see a decrease in workload is now greater than the number expecting an increase

Expected change in workload over next 3 months: Private Housing



Expected change in workload over next 3 months: Public Housing

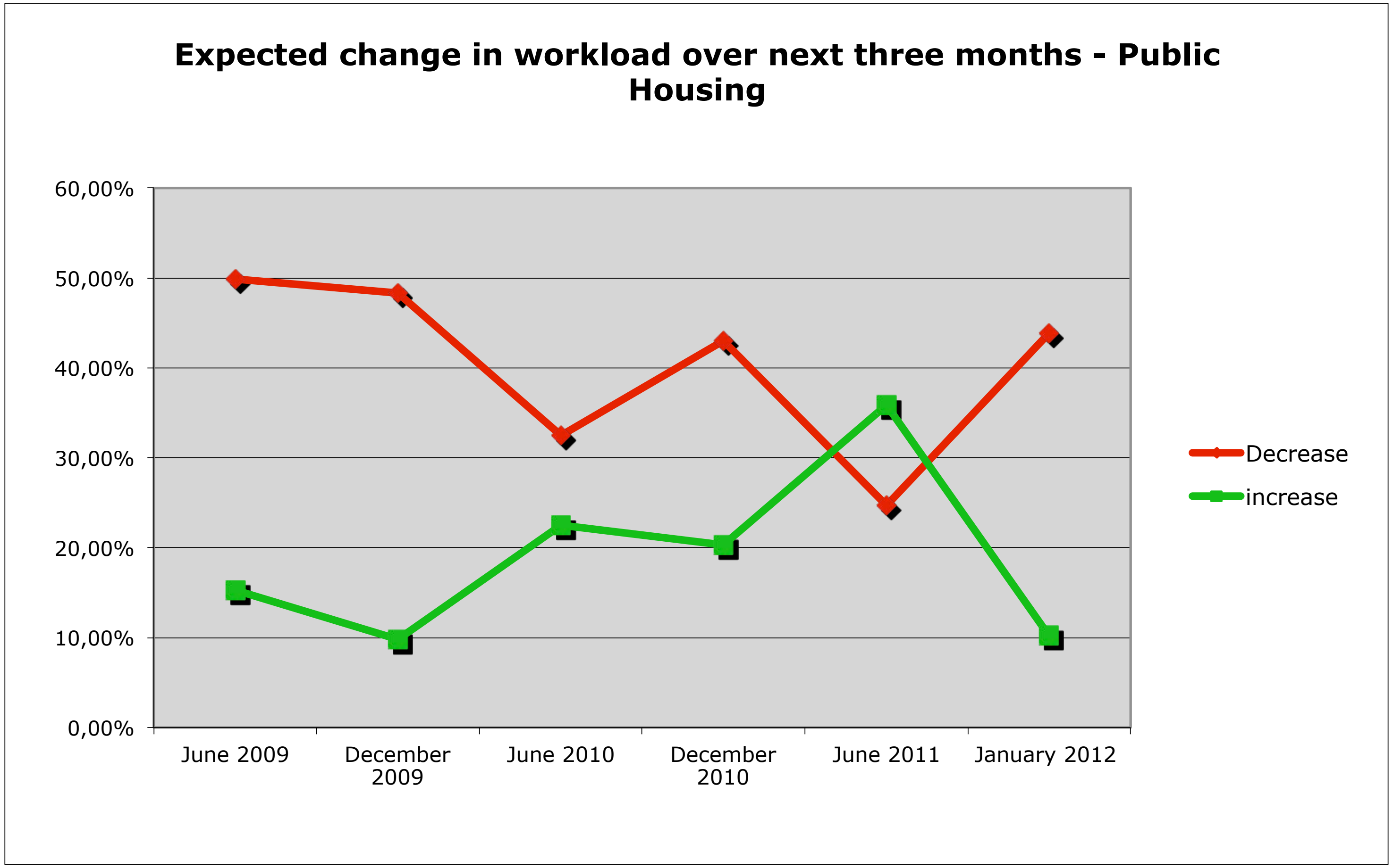


	Decrease	increase
June 2009	49,90%	15,31%
December 2009	48,30%	9,80%
June 2010	32,50%	22,50%
December 2010	43,00%	20,30%
June 2011	24,70%	35,90%
January 2012	**43,80%**	**10,20%**

Readers are reminded that "public housing" accounts for 6% of the market for architects in Europe

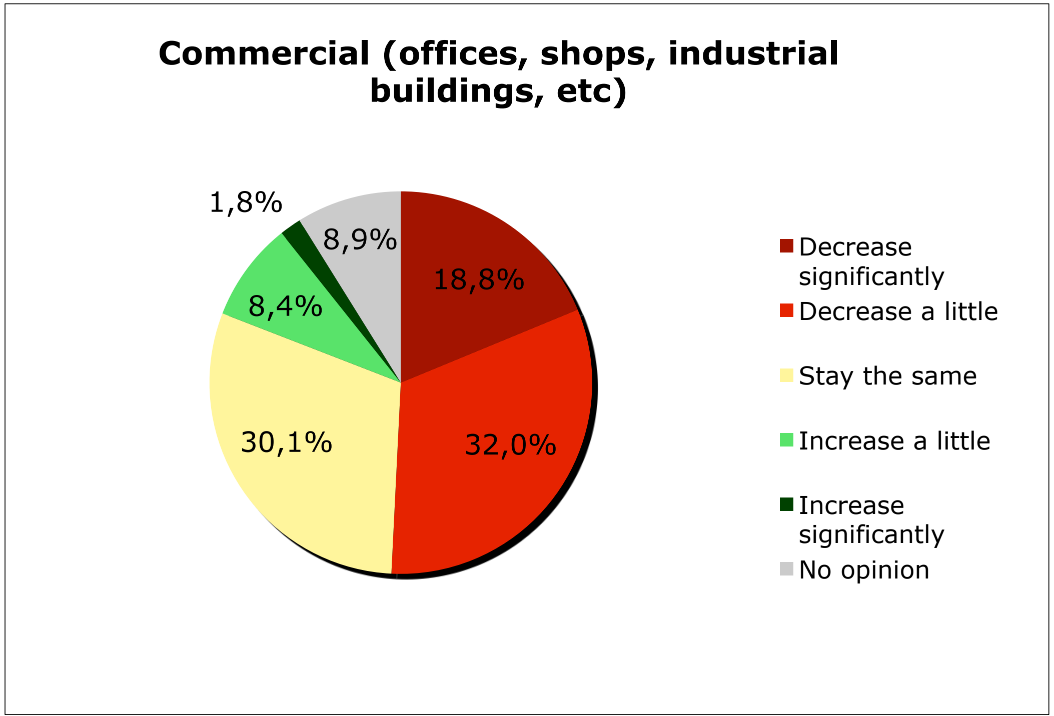
Note that the number of architects expecting to see a decrease in workload for public housing is almost 20% higher than in June 2011

Expected change in workload over next 3 months: Public Housing



Ninth Economic Impact Survey January 2012

Expected change in workload over next 3 months: Commercial

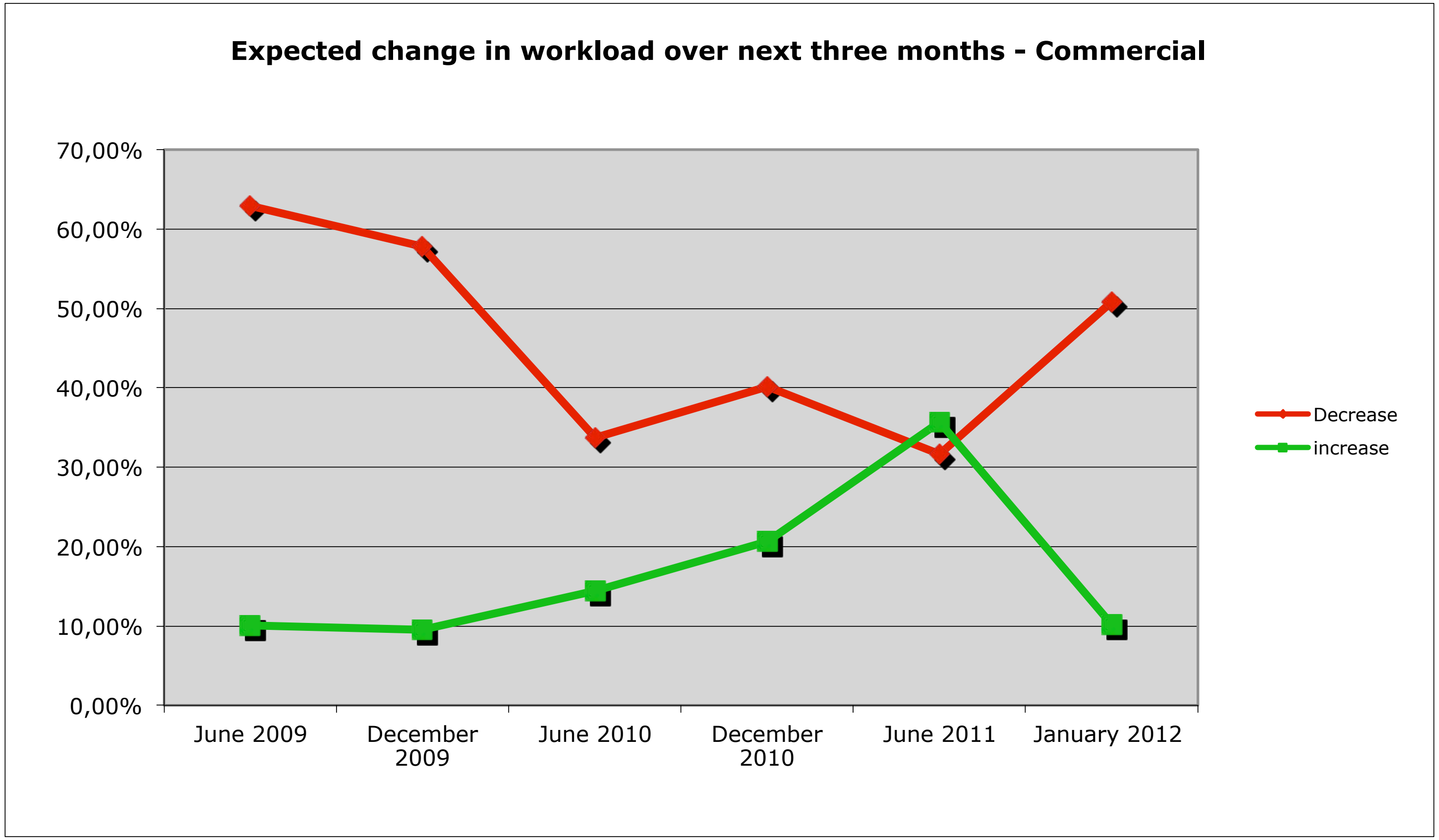


	Decrease	increase
June 2009	62,87%	10,08%
December 2009	57,80%	9,50%
June 2010	33,70%	14,40%
December 2010	40,10%	20,60%
June 2011	31,60%	35,70%
January 2012	**50,80%**	**10,20%**

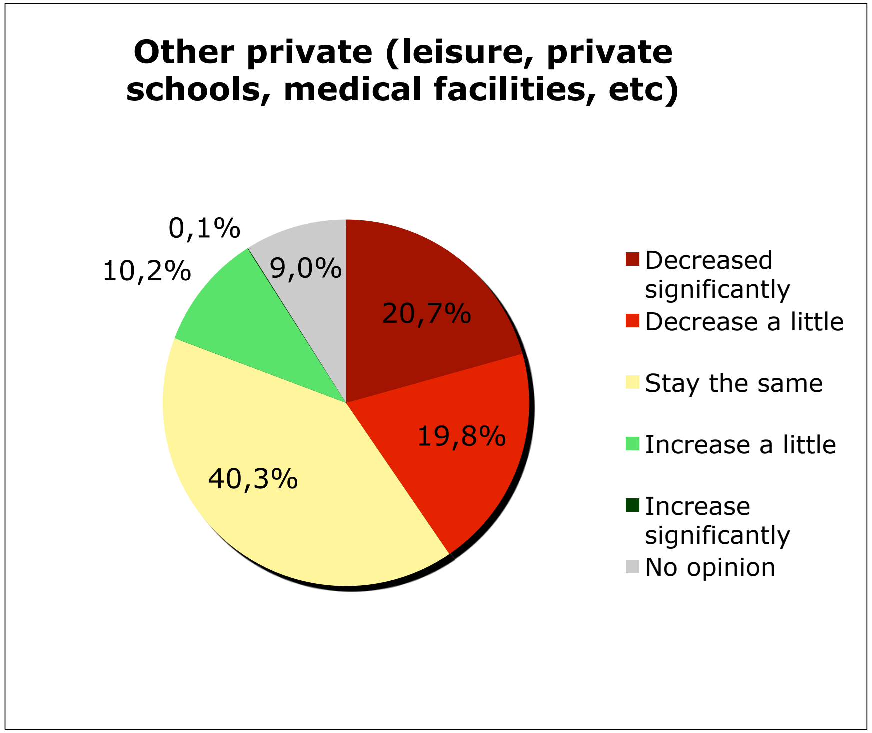
Readers are reminded that "commercial" projects account for 23% of the market for architects in Europe

Note that the number of architects expecting to see a decrease in workload for commercial has reached 50%

Expected change in workload over next 3 months: Commercial



Expected change in workload over next 3 months: Other Private

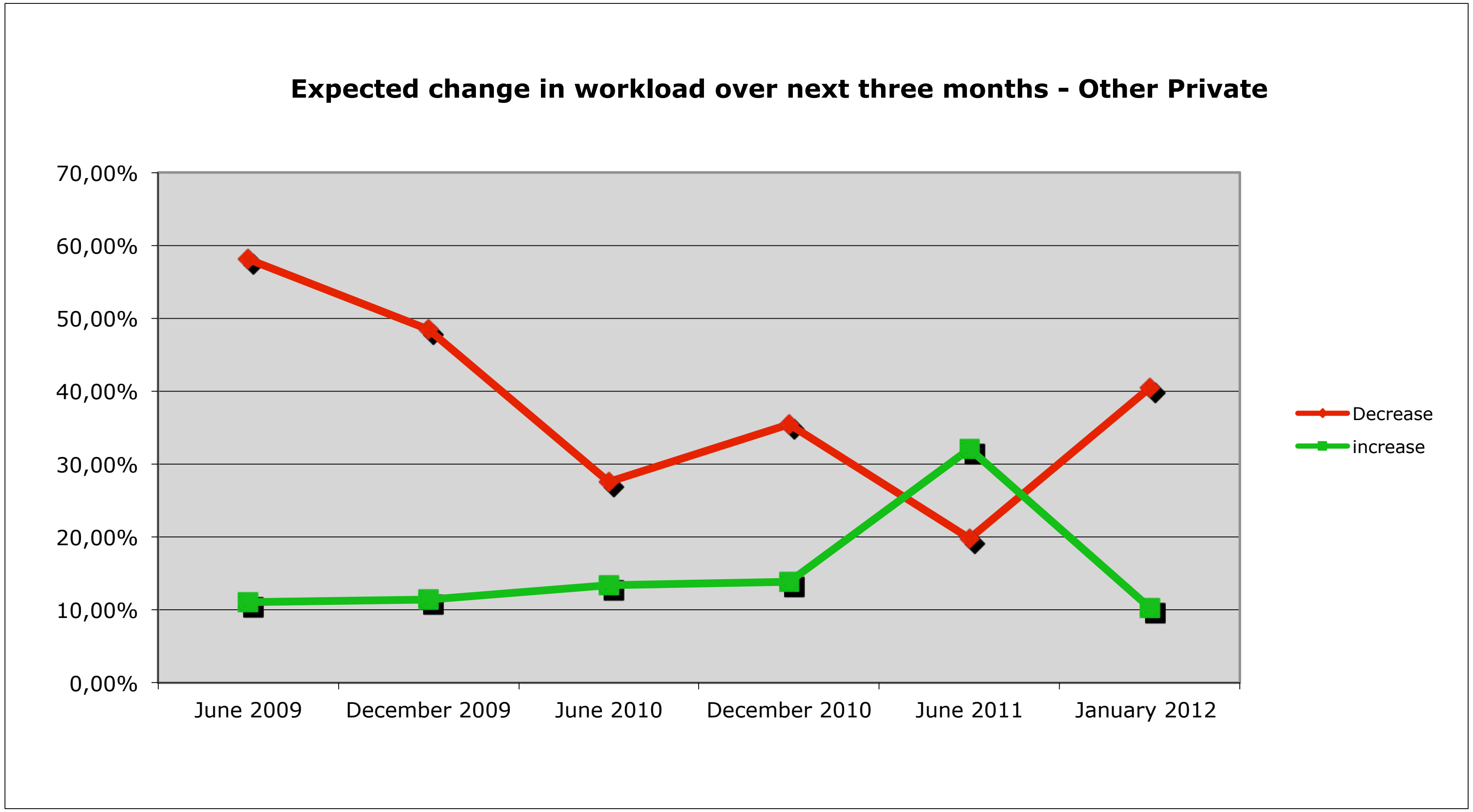


	Decrease	increase
June 2009	58,16%	11,05%
December 2009	48,50%	11,40%
June 2010	27,50%	13,40%
December 2010	35,40%	13,90%
June 2011	19,80%	32,10%
January 2012	**40,50%**	**10,30%**

Readers are reminded that "other private" projects account for 7% of the market for architects in Europe

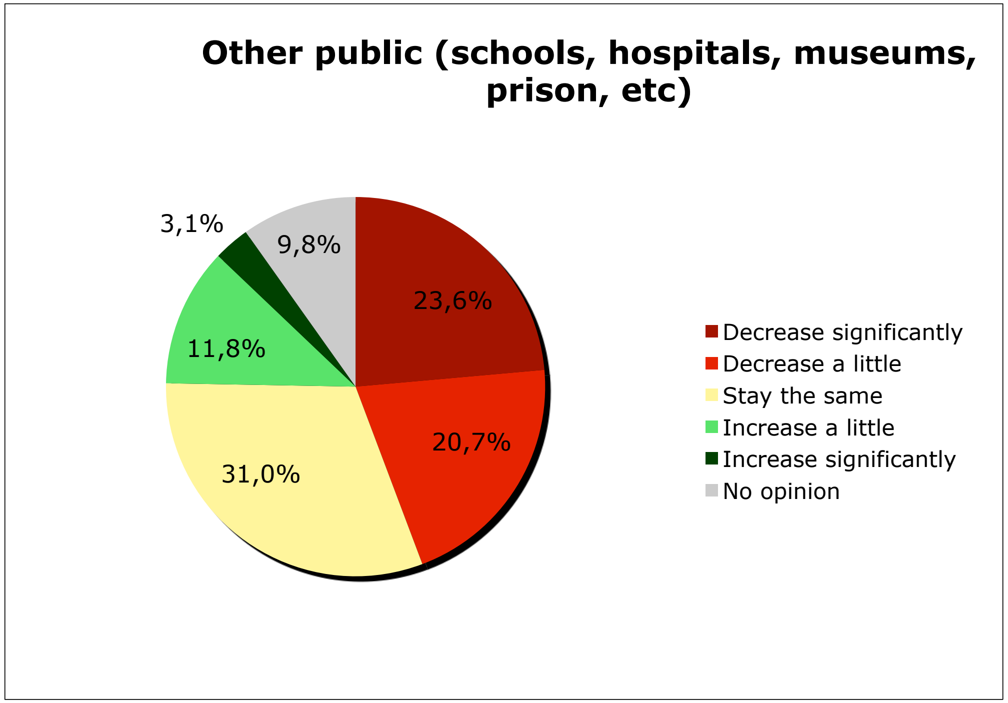
The number of architects expecting to see a decrease in other private projects is 40%

Expected change in workload over next 3 months: Other Private



Ninth Economic Impact Survey January 2012

Expected change in workload over next 3 months: Other Public

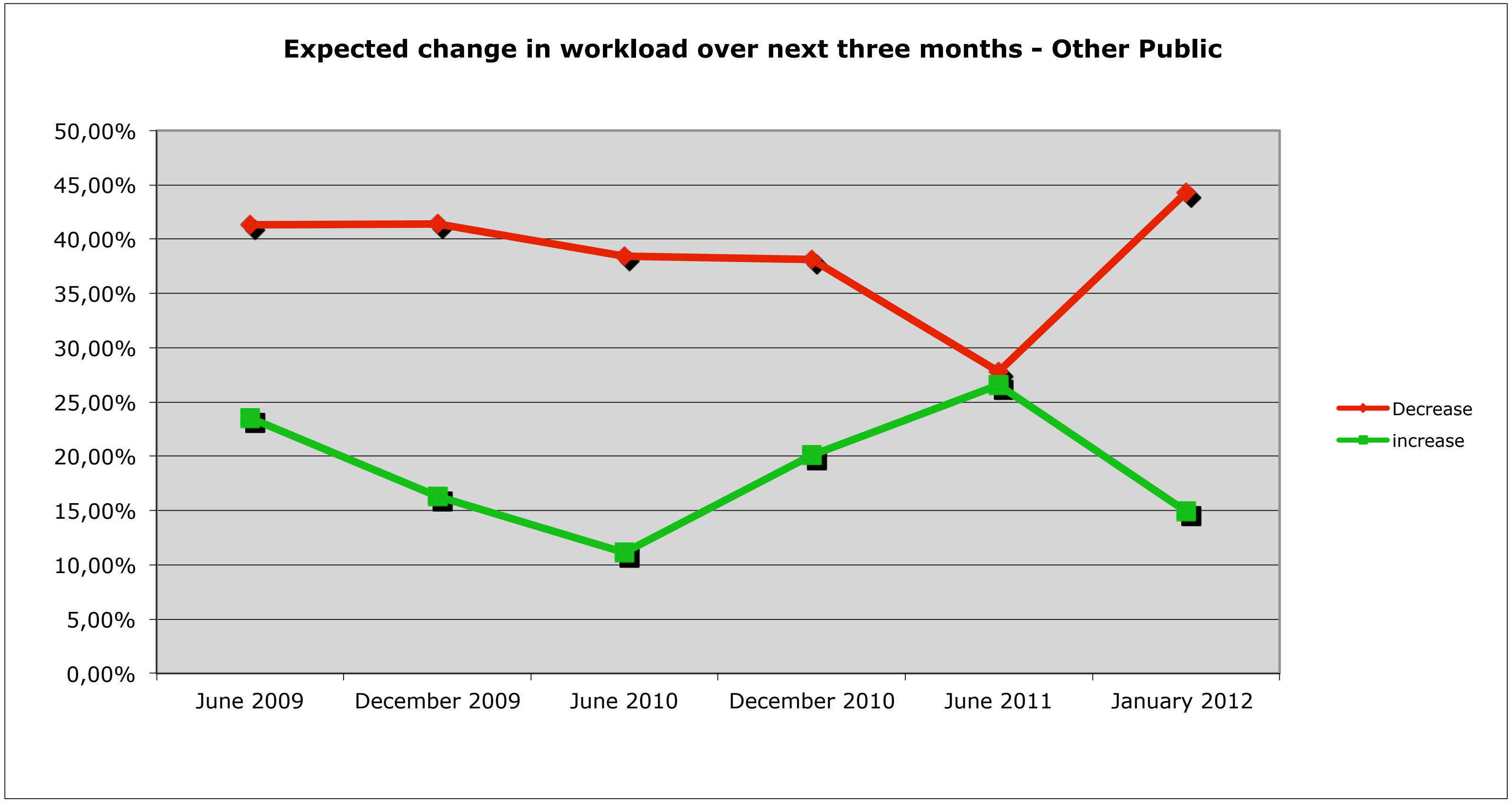


	Decrease	increase
June 2009	41,34%	23,56%
December 2009	41,40%	16,30%
June 2010	38,40%	11,10%
December 2010	38,10%	20,10%
June 2011	27,80%	26,60%
January 2012	**44,30%**	**14,90%**

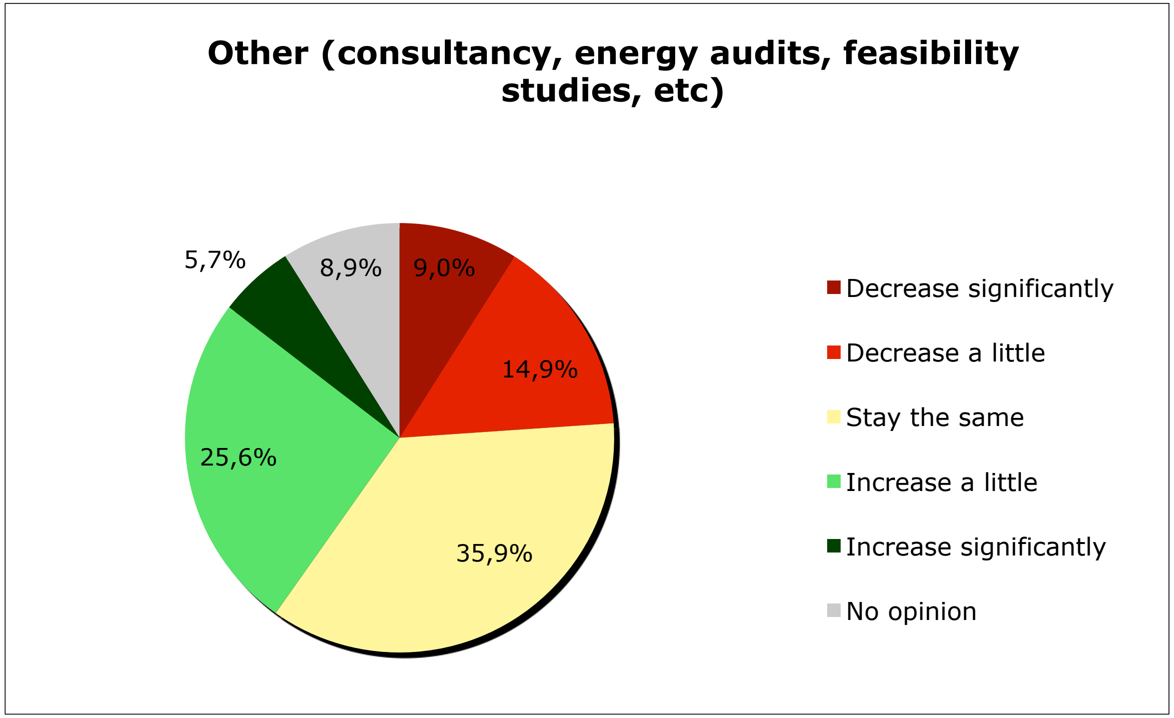
Readers are reminded that "other public" projects account for 20% of the market for architects in Europe

The number of architects expecting to see a decrease in other public projects is 44%

Expected change in workload over next 3 months: Other Public



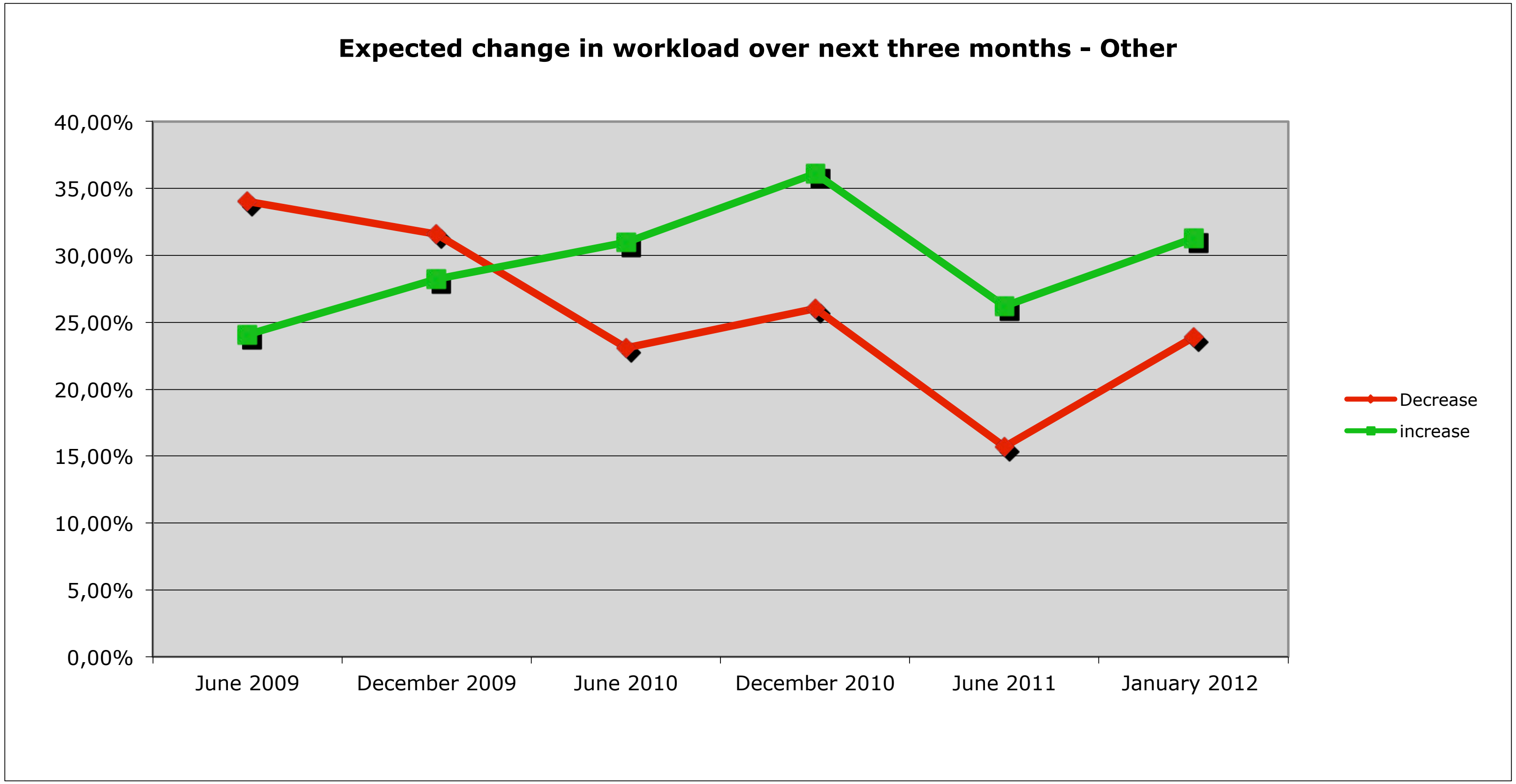
Expected change in workload over next 3 months: Other



	Decrease	increase
June 2009	34,05%	24,07%
December 2009	31,60%	28,20%
June 2010	23,10%	31,00%
December 2010	26,00%	36,10%
June 2011	15,70%	26,20%
January 2012	**23,90%**	**31,30%**

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

Expected change in workload over next 3 months: Other



Conclusions:

- **Although slight improvements recently recorded, the profession has not confirmed the revival announced in June 2011**

- **The survey shows little sense of optimism for the next three months with a decrease in all work areas**

- **Architects should demonstrate extra patience and determination in coming months, without losing their hope of overcoming the economic downturn**