ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

December 2010

Seventh Snapshot Survey
Of
Impact of Economic Crisis

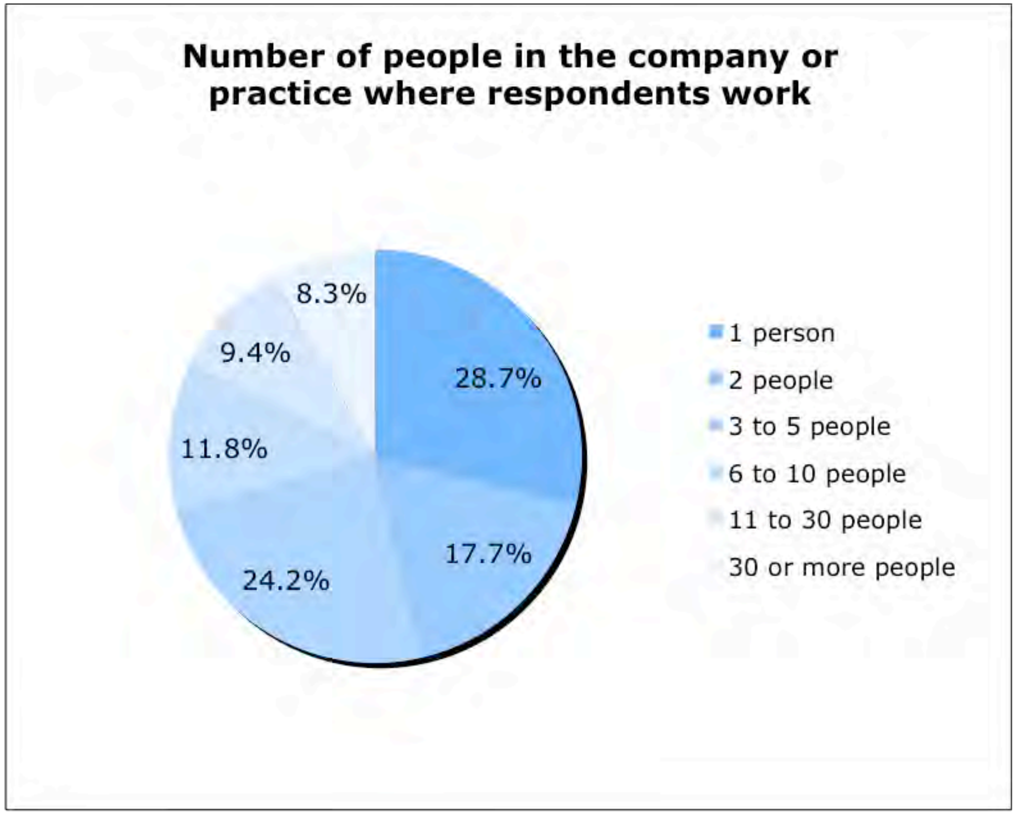
Breakdown of Responses:

Country	Answers in April 2009	Answers in June 2009	Answers in September 2009	Answers in December 2009	Answers in March 2010	Answers in June 2010	Answers in December 2010
Austria	18	7	24	19	18	4	9
Belgium	995	630	31	39	443	336	48
Bosnia & Herzegovina	0	2	0	0	0	1	0
Bulgaria	0	17	170	96	105	75	164
Croatia	0	126	24	5	5	251	28
Cyprus	3	3	0	0	1	4	2
Czech Republic	128	55	151	67	57	134	224
Denmark	13	92	13	14	7	23	14
Estonia	25	23	0	39	26	17	1
Finland	210	32	30	17	5	12	18
France	17	1736	1508	1652	1374	1058	874
FYROM	1	0	0	3	2	1	1
Germany	75	127	208	87	112	429	90
Greece	235	216	162	180	281	225	321
Hungary	0	121	5	0	3	2	2
Irlande	13	91	354	14	21	216	43
Italy	1	83	8	39	13	16	12

Breakdown of Responses:

Country	Answers in April 2009	Answers in June 2009	Answers in September 2009	Answers in December 2009	Answers in March 2010	Answers in June 2010	Answers in December 2010
Latvia	25	22	12	22	1	12	21
Lithuania	0	37	0	35	2	33	46
Luxembourg	11	12	5	9	6	5	4
Malta	33	13	11	15	3	21	1
Netherlands	10	7	9	14	10	36	16
Norway	83	2	0	2	1	0	75
Poland	12	18	54	53	59	35	312
Portugal	17	75	17	80	14	10	10
Romania	36	315	296	210	198	210	220
Slovakia	0	0	0	28	0	1	2
Slovenia	9	9	11	92	61	4	75
Spain	1	21	18	600	678	12	244
Sweden	17	51	16	12	14	13	38
Switzerland	1	6	7	3	3	6	4
Turkey	37	130	147	123	203	128	838
United Kingdom	21	27	32	22	27	34	25
TOTAL	**2047**	**4106**	**3323**	**3591**	**3753**	**3363**	**3782**

Profile of Respondents:

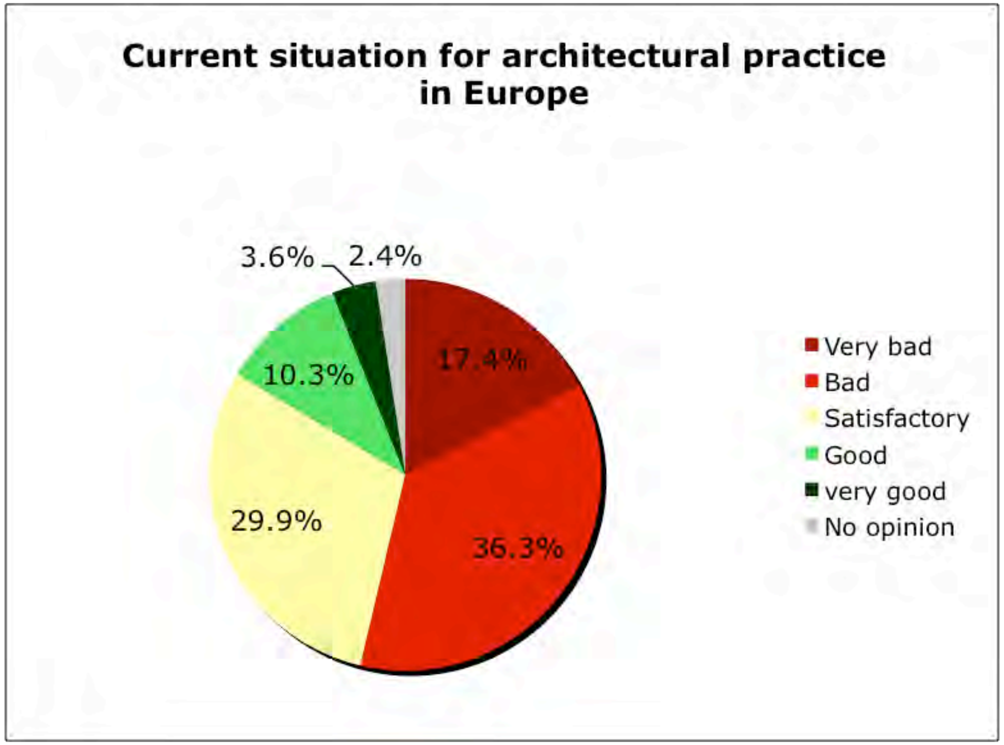


Good Representation from all sizes of Architectural Practice

Spread Reflects Sector Study Profile well

No Other Information About Respondents was Sought

Seventh Economic Impact Survey — December 2010

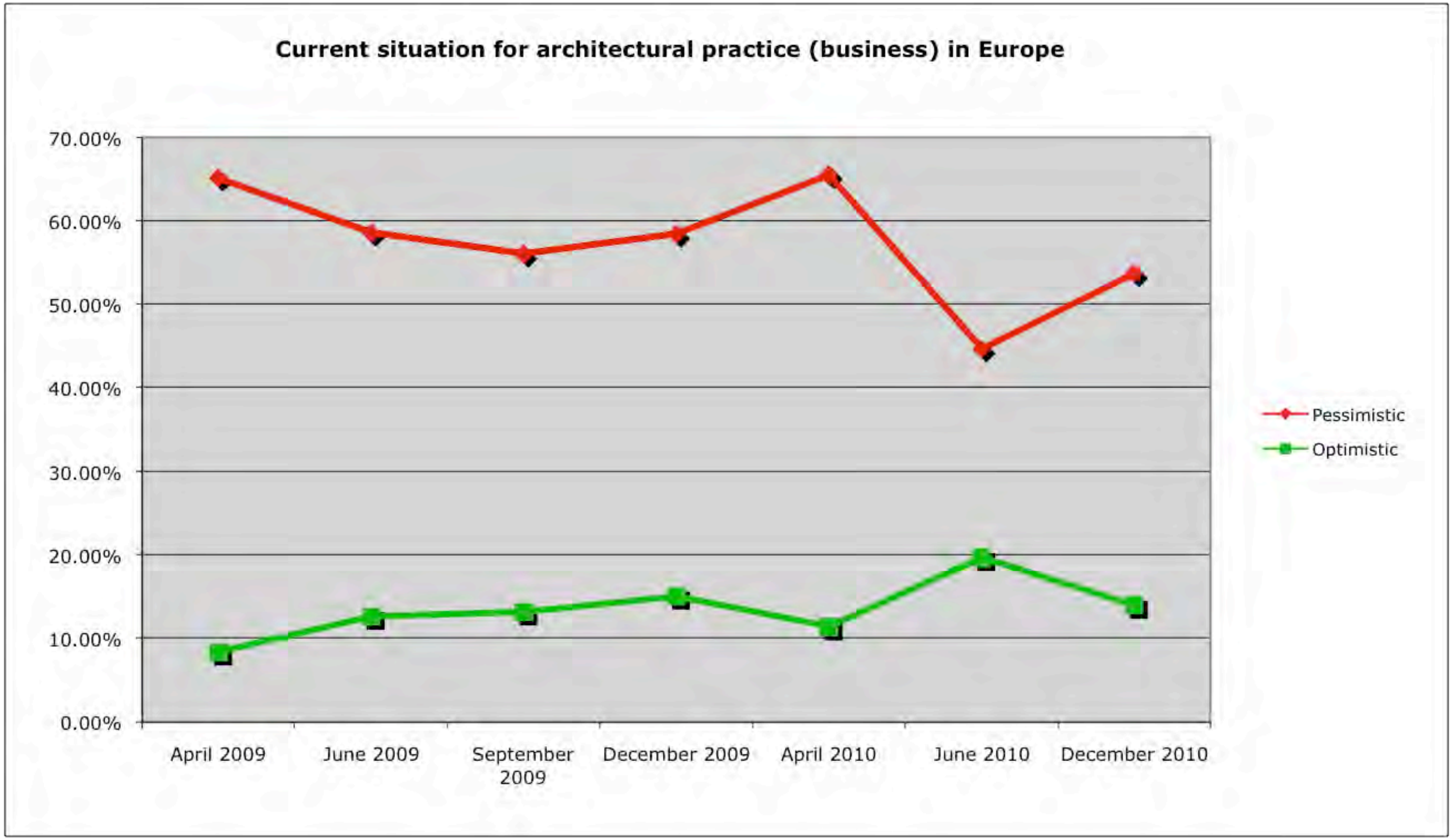


	Pessimistic	Optimistic
December 2010	**53,70%**	**14,00%**
June 2010	44,70%	19,70%
April 2010	65,50%	11,40%
December 2009	58,40%	15,10%
September 2009	56,03%	13,21%
June 2009	58,55%	12,67%
April 2009	65,16%	8,41%

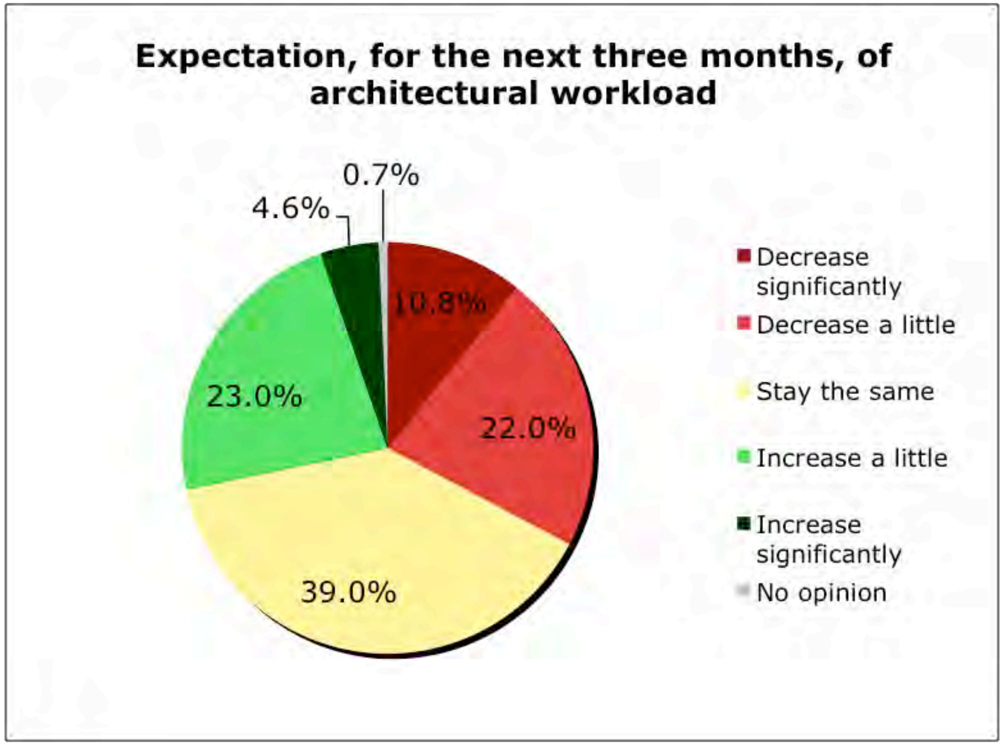
Level of Optimism has decreased again, with a higher level of pessimism (53,7%) than June 2010

Survey to be Repeated in June 2011 to Extend Trend Analysis

Current Situation for Architectural Practice in Europe



Seventh Economic Impact Survey December 2010

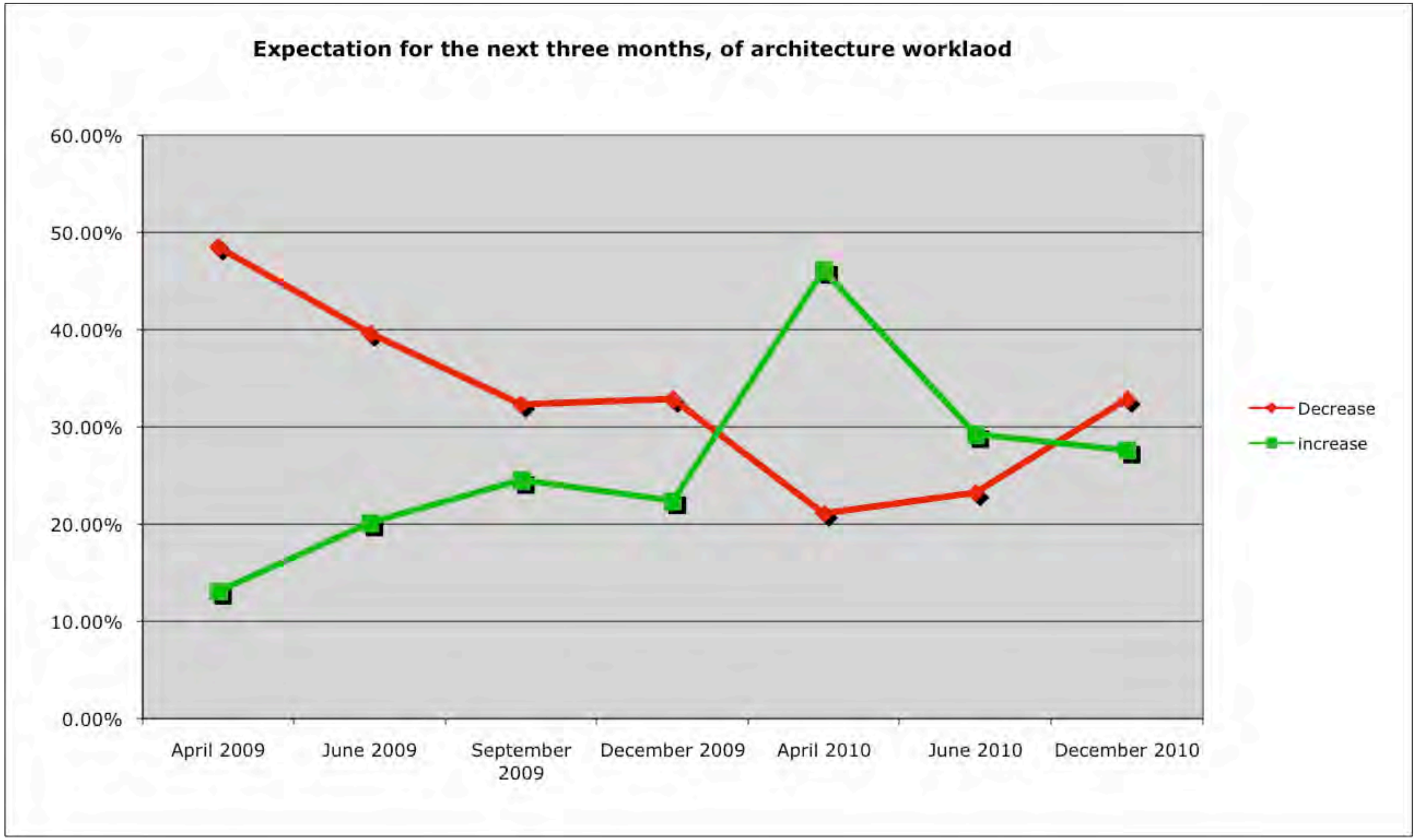


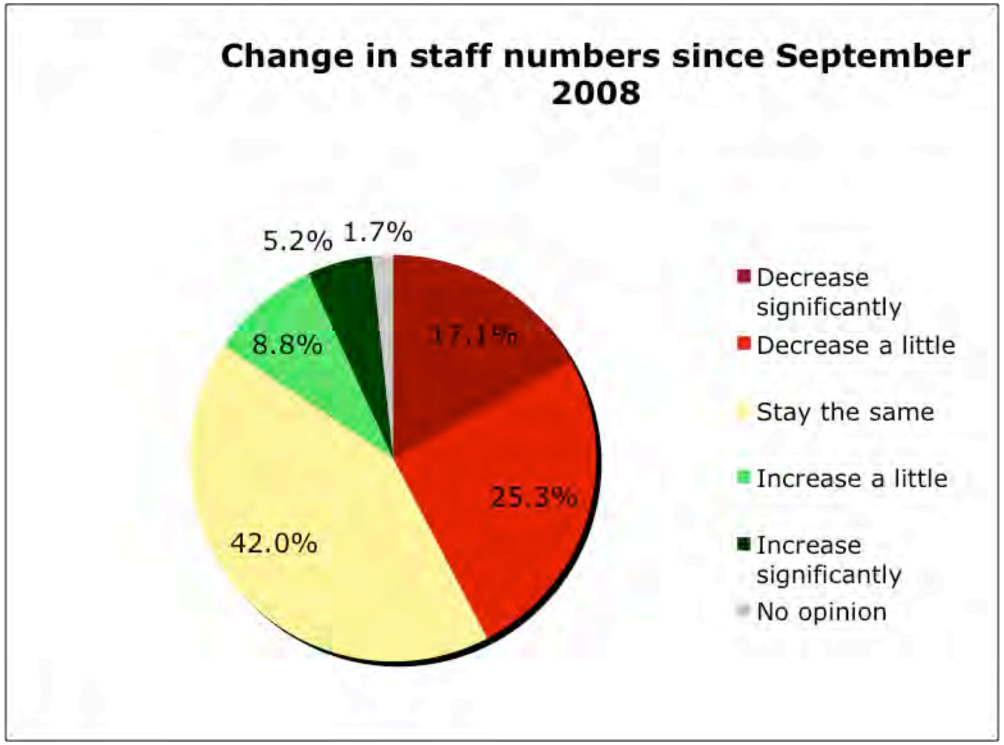
	Decrease	Increase
December 2010	**32,80%**	**27,60%**
June 2010	23,20%	29,20%
April 2010	21,10%	46,10%
December 2009	32,80%	22,40%
September 2009	32,30%	24,49%
June 2009	39,60%	20,11%
April 2009	48,47%	13,09%

Breakdown by Building Type Comes Later in the Presentation

Expectations for an Increase have continued to fall since the high expectations in April 2010

Expectation, for the next three months, of Architecture Workload



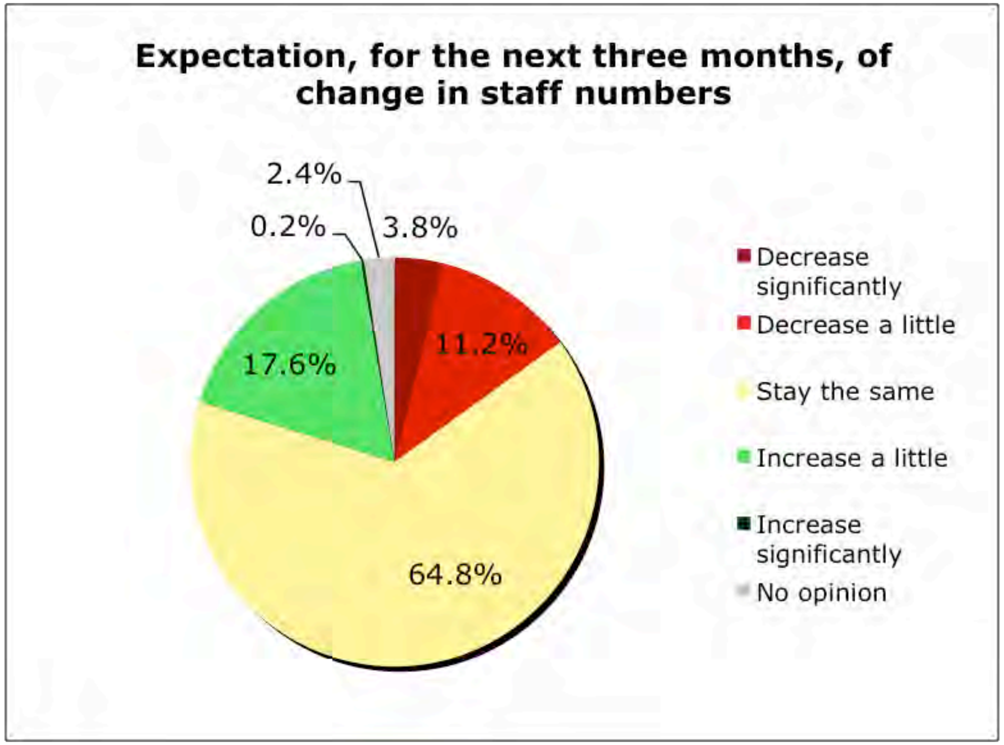


This result indicates that 1 in 3 offices have seen a decrease in staff numbers since the start of the crisis

	Decrease	Increase
December 2010	**42,30%**	**14,00%**
June 2010	47,90%	14,50%
April 2010	36,10%	12,10%
December 2009	40,90%	15,20%
September 2009	37,49%	12,12%
June 2009	53,60%	11,36%
April 2009	37,18%	6,85%

Change in Staff Numbers since September 2008

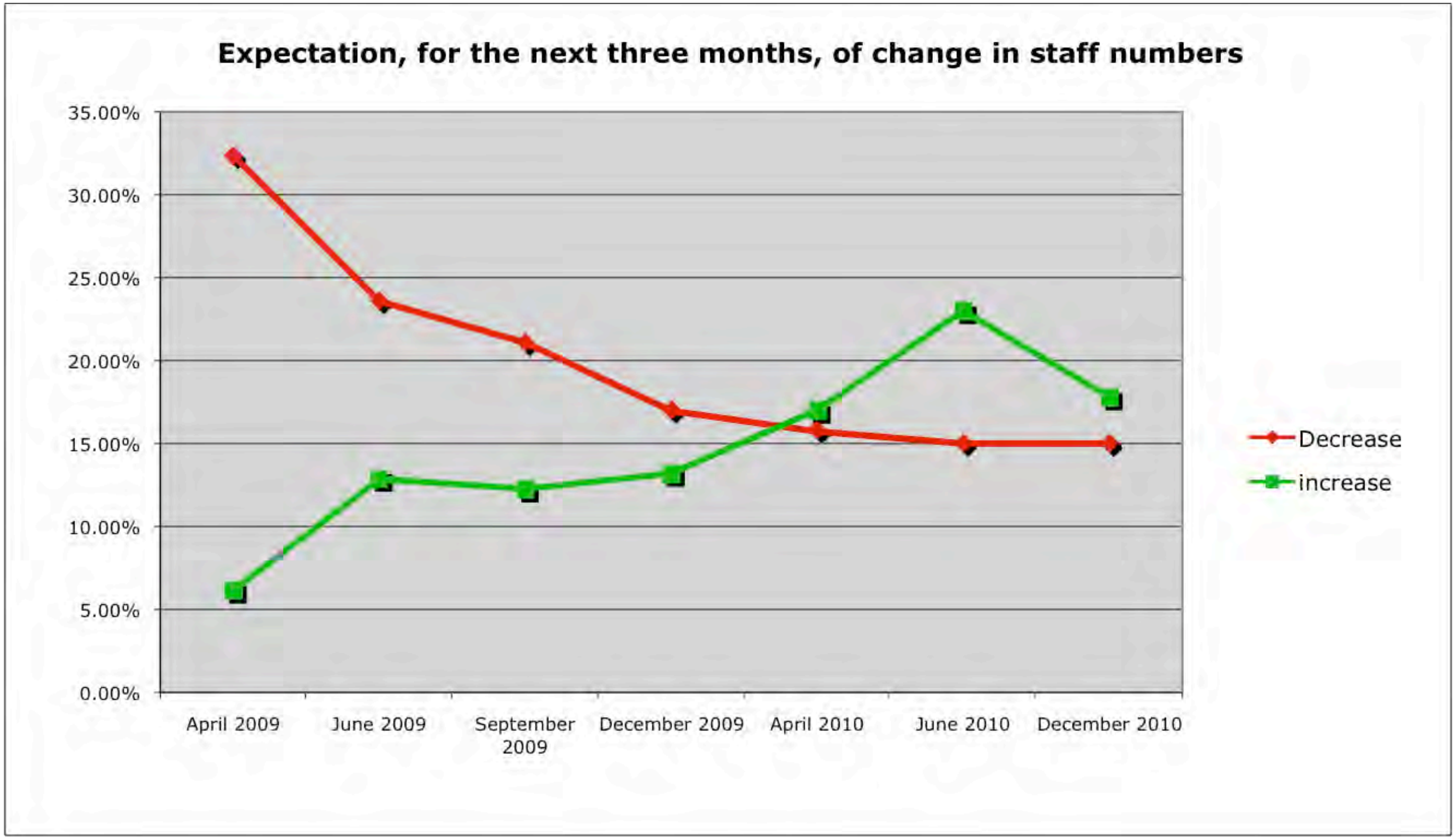
Seventh Economic Impact Survey December 2010



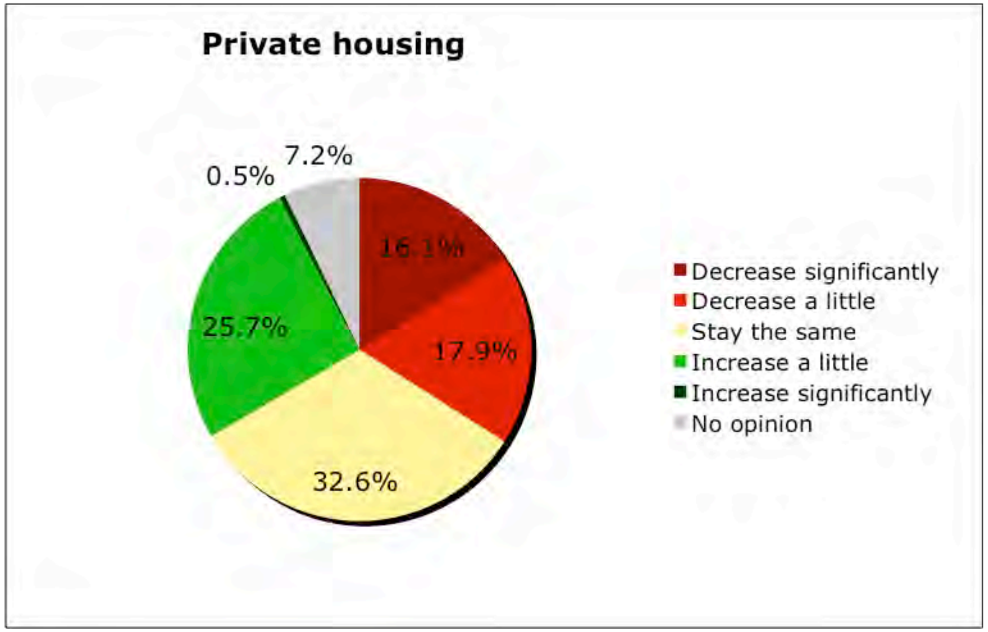
	Decrease	Increase
December 2010	**15,00%**	**17,80%**
June 2010	15,00%	23,00%
April 2010	15,80%	17,00%
December 2009	17,00%	13,20%
September 2009	21,07%	12,25%
June 2009	23,60%	12,90%
April 2009	32,35%	6,15%

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

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



Expected Change in Workload Over Next 3 Months: Private Housing



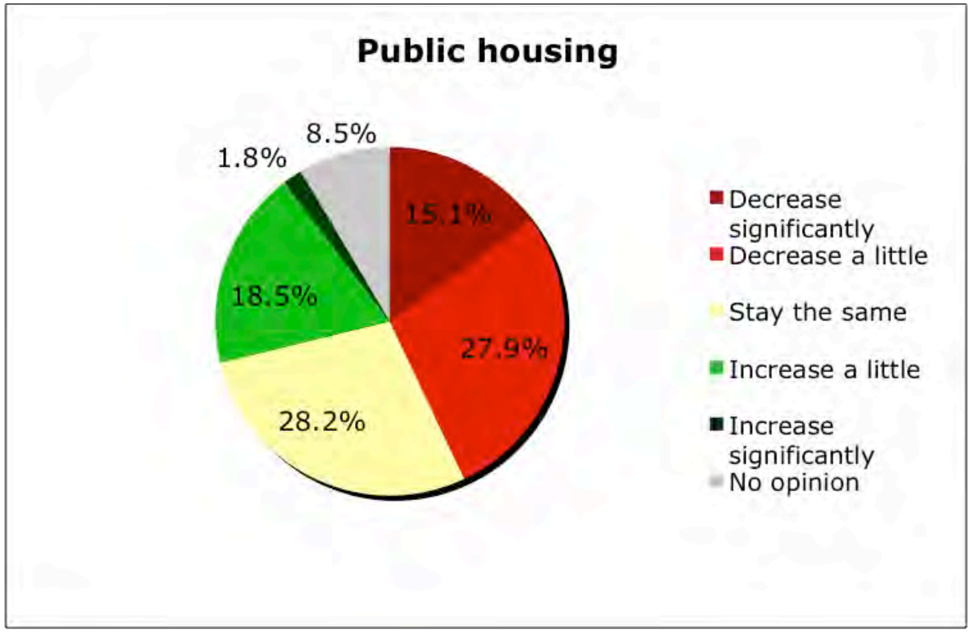
	Decrease	Increase
December 2010	**34,00%**	**26,20%**
June 2010	28,00%	29,30%
April 2010	35,30%	15,60%
December 2009	47,30%	15,70%
September 2009	44,84%	15,88%
June 2009	57,60%	14,87%
April 2009	67,04%	10,44%

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

Note that, once again, the number of architects expecting to see a decrease in workload for private housing is greater than the number expecting an increase

Expected Change in Workload Over Next 3 Months: Private Housing

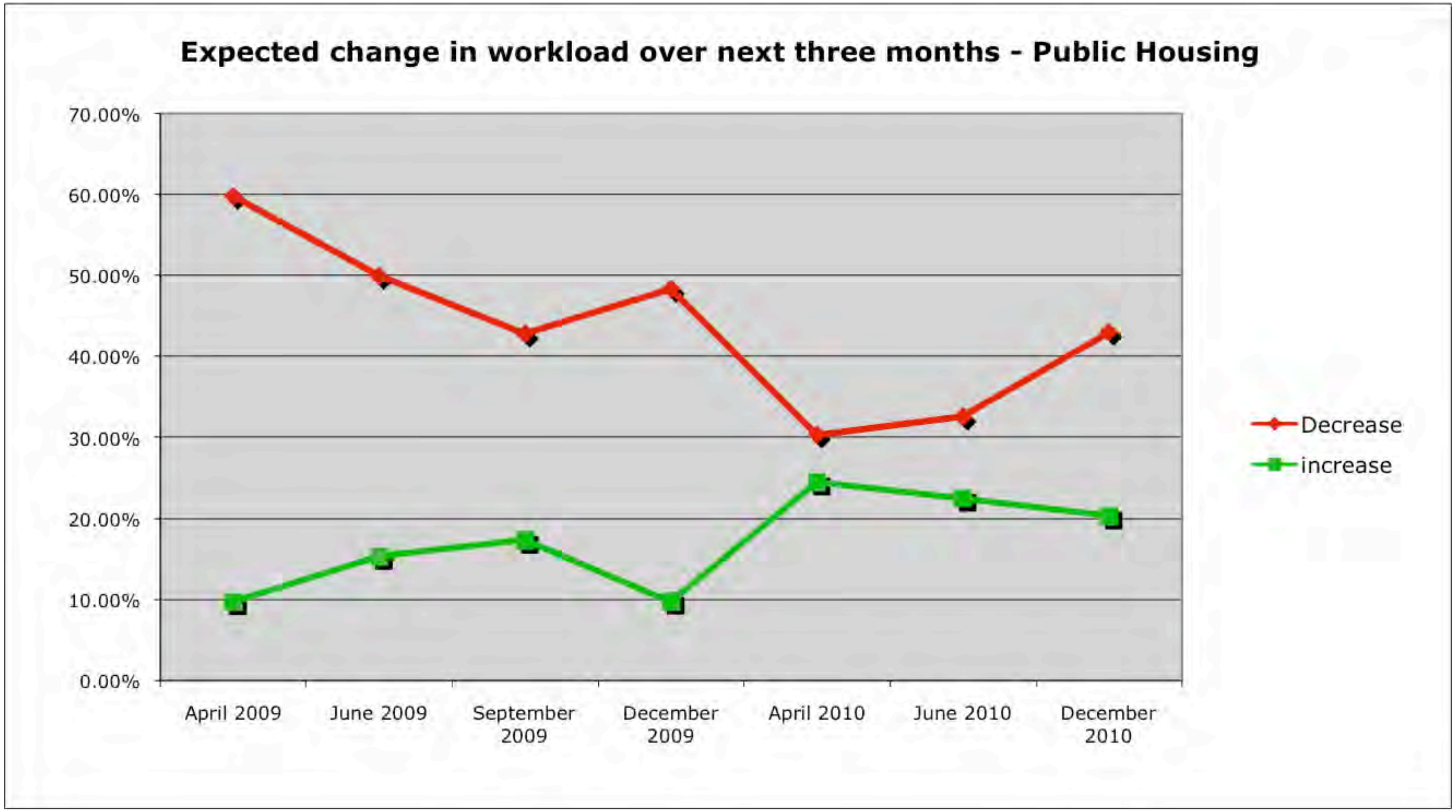
Expected Change in Workload Over Next 3 Months: Public Housing



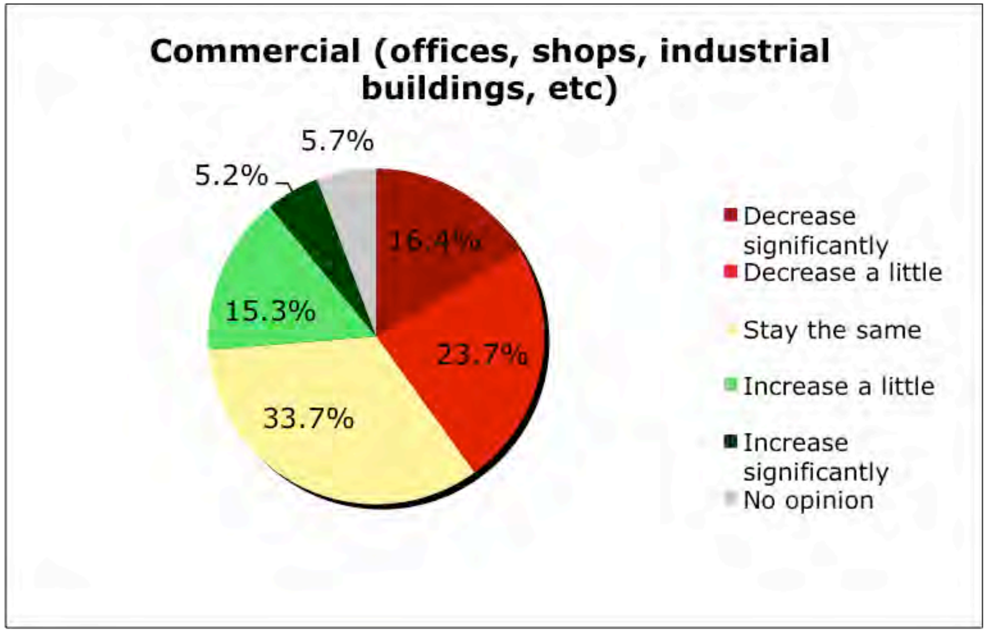
	Decrease	Increase
December 2010	**43,00%**	**20,30%**
June 2010	32,50%	22,50%
April 2010	30,30%	24,50%
December 2009	48,30%	9,80%
September 2009	42,75%	17,31%
June 2009	49,90%	15,31%
April 2009	59,78%	9,73%

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

Expected Change in Workload Over Next 3 Months: Public Housing



Expected Change in Workload Over Next 3 Months: Commercial



	Decrease	Increase
December 2010	**40,10%**	**20,60%**
June 2010	33,70%	14,40%
April 2010	48,00%	15,80%
December 2009	57,80%	9,50%
September 2009	53,71%	11,56%
June 2009	62,87%	10,08%
April 2009	76,19%	5,18%

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

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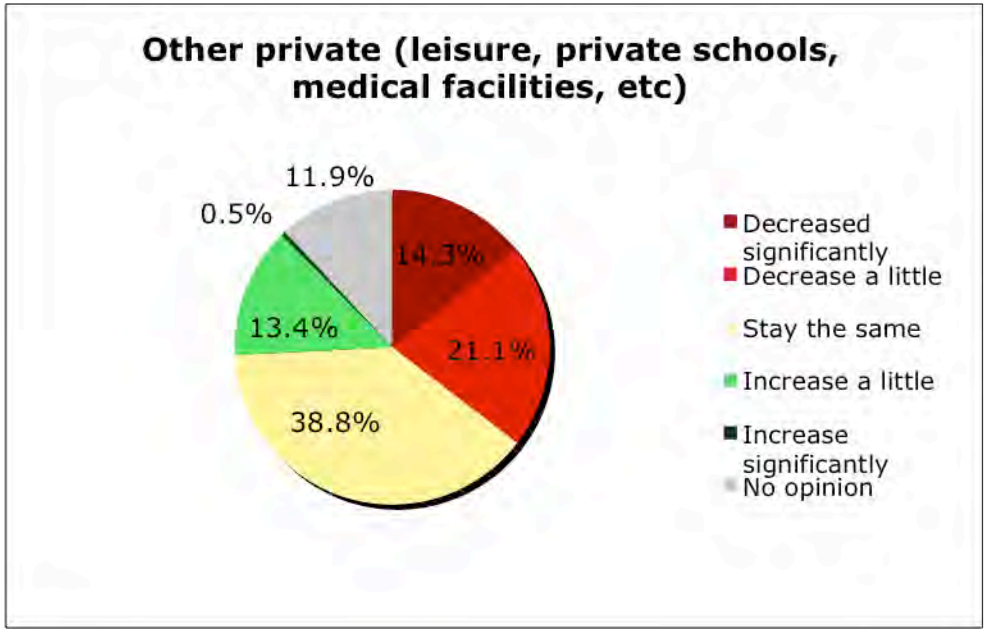
Expected Change in Workload Over Next 3 Months: Commercial

Expected Change in Workload Over Next 3 Months: Other Private



	Decrease	Increase
December 2010	**35,40%**	**13,90%**
June 2010	27,50%	13,40%
April 2010	36,50%	10,00%
December	48,50%	11,40%
September 2009	43,12%	14,06%
June 2009	58,16%	11,05%
April 2009	62,07%	3,12%

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

Expected Change in Workload Over Next 3 Months: Other Private

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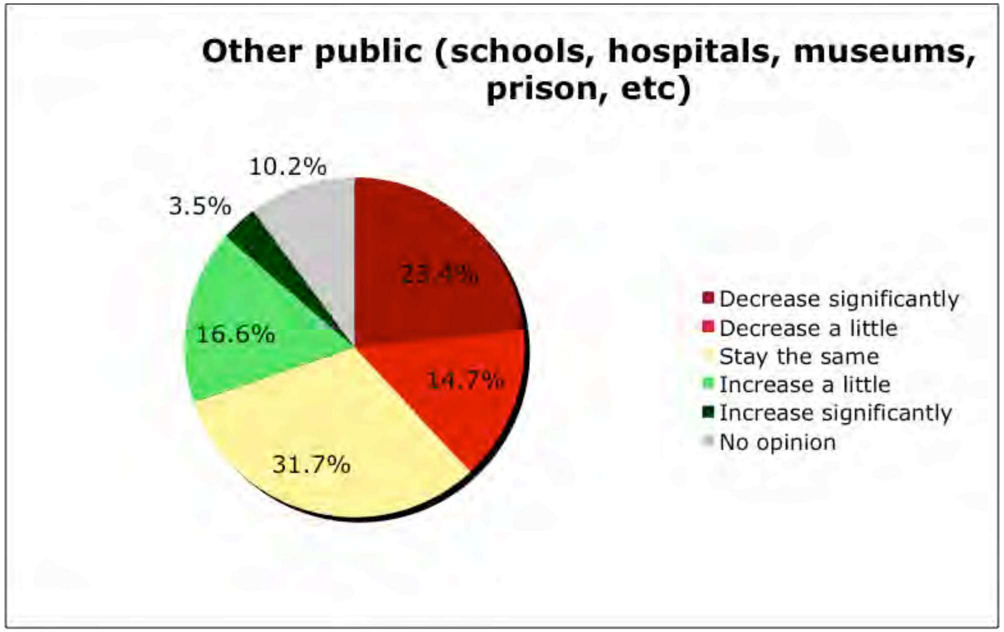
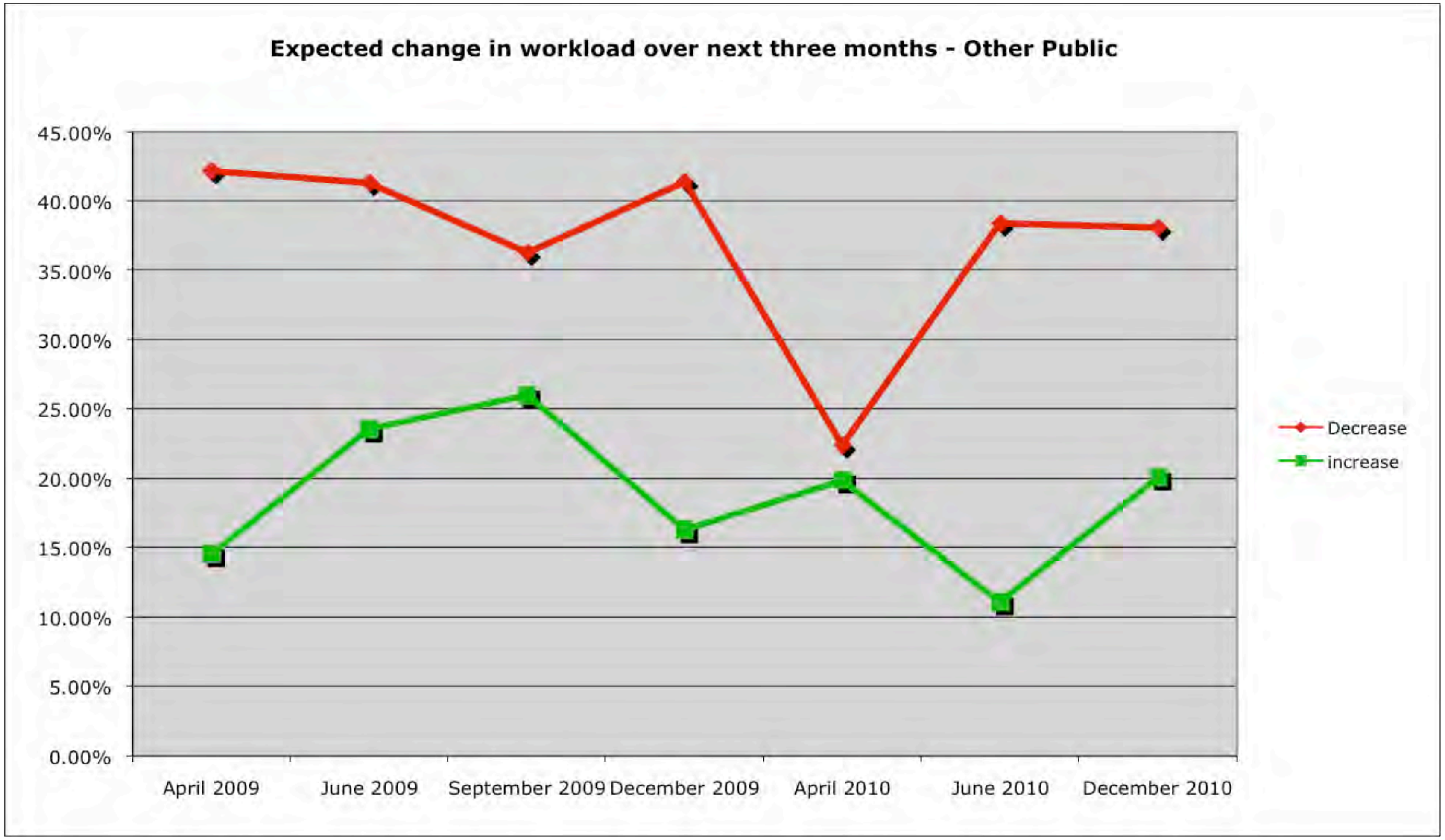
Expected Change in Workload Over Next 3 Months: Other Public



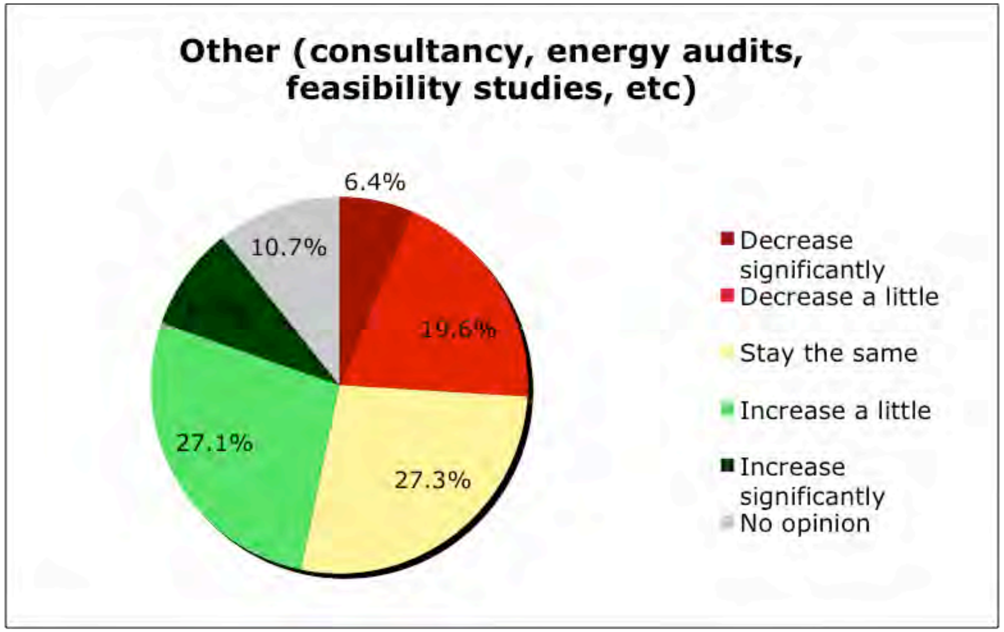
	Decrease	Increase
December 2010	**38,10%**	**20,10%**
June 2010	38,40%	11,10%
April 2010	22,40%	19,90%
December 2009	41,40%	16,30%
September 2009	36,29%	26,02%
June 2009	41,34%	23,56%
April 2009	42,18%	14,58%

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

Expected Change in Workload Over Next 3 Months: Other Public



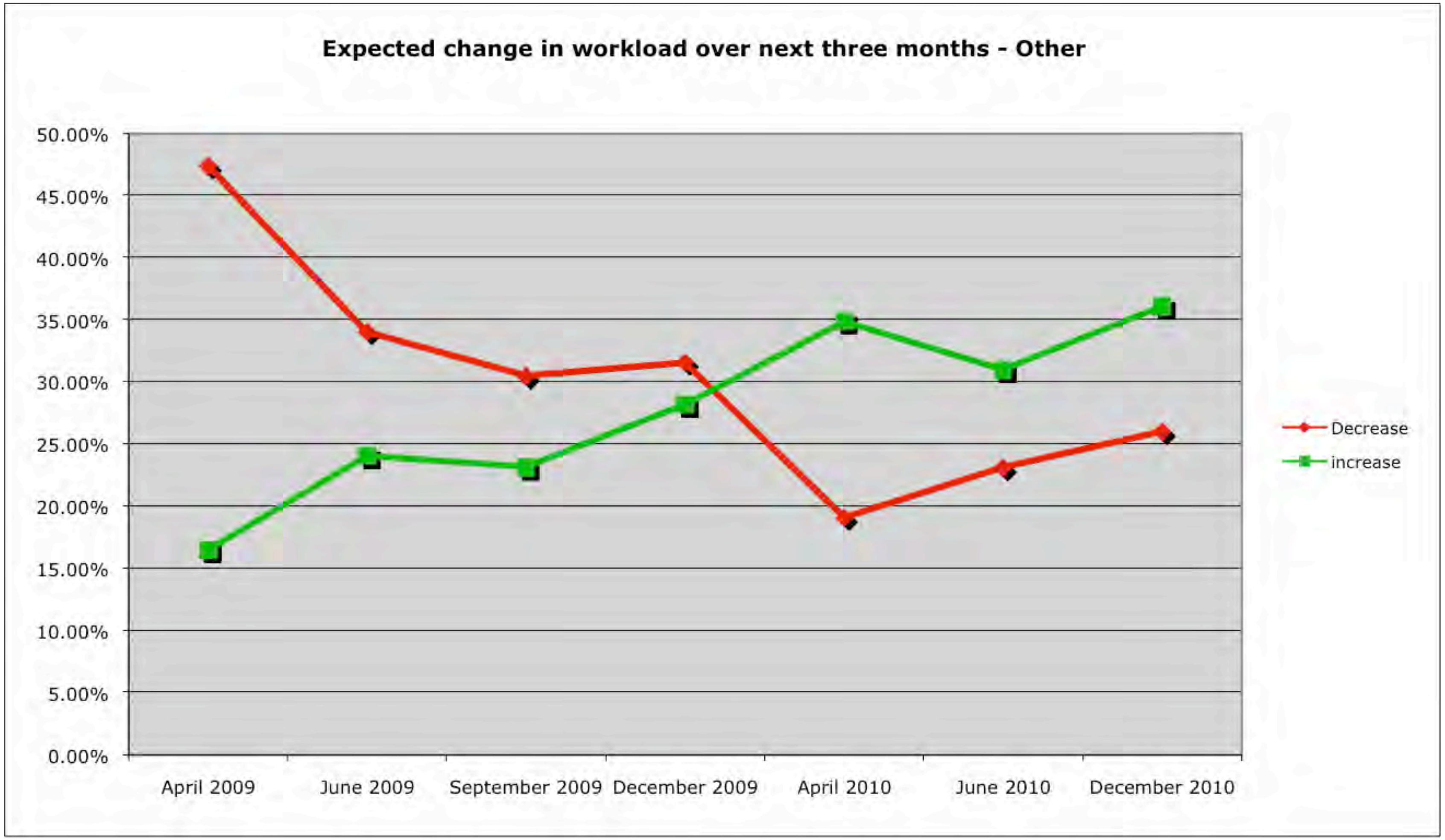
Expected Change in Workload Over Next 3 Months: Other



	Decrease	Increase
December 2010	**26,00%**	**36,10%**
June 2010	23,10%	31,00%
April 2010	19,10%	34,90%
December 2009	31,60%	28,20%
September 2009	30,47%	23,14%
June 2009	34,05%	24,07%
April 2009	47,38%	16,51%

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

Expected Change in Workload Over Next 3 Months: Other



Conclusions:

- The profession is reporting a “double-dip” recession and continues to be badly affected by the economic downturn
- There is little sense of optimism and a continued lack of confidence in the public sector
- A small recovery in terms of employment for architects is noted but no longer seems to be strengthening, as compared to June 2010.