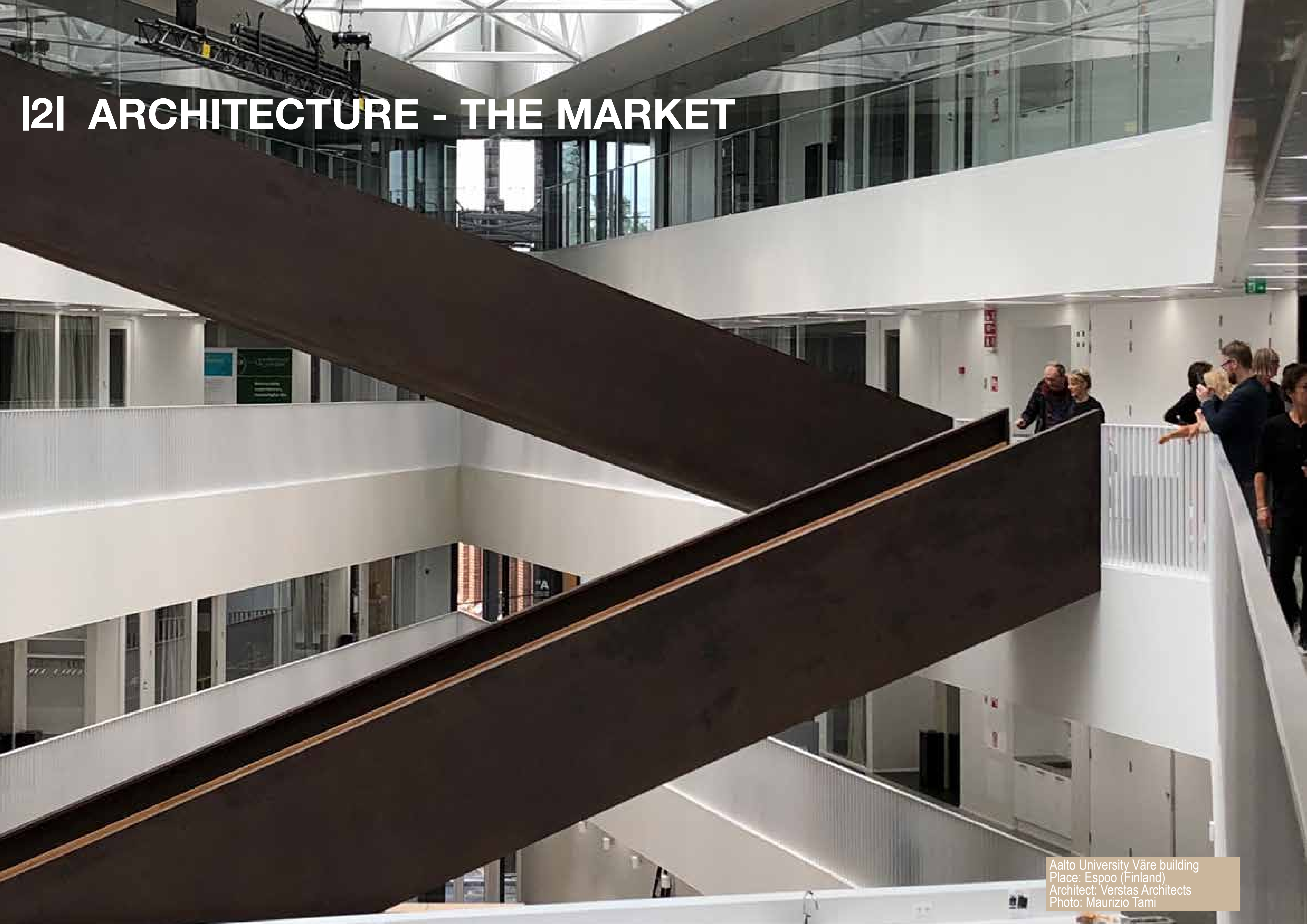
|2| ARCHITECTURE - THE MARKET



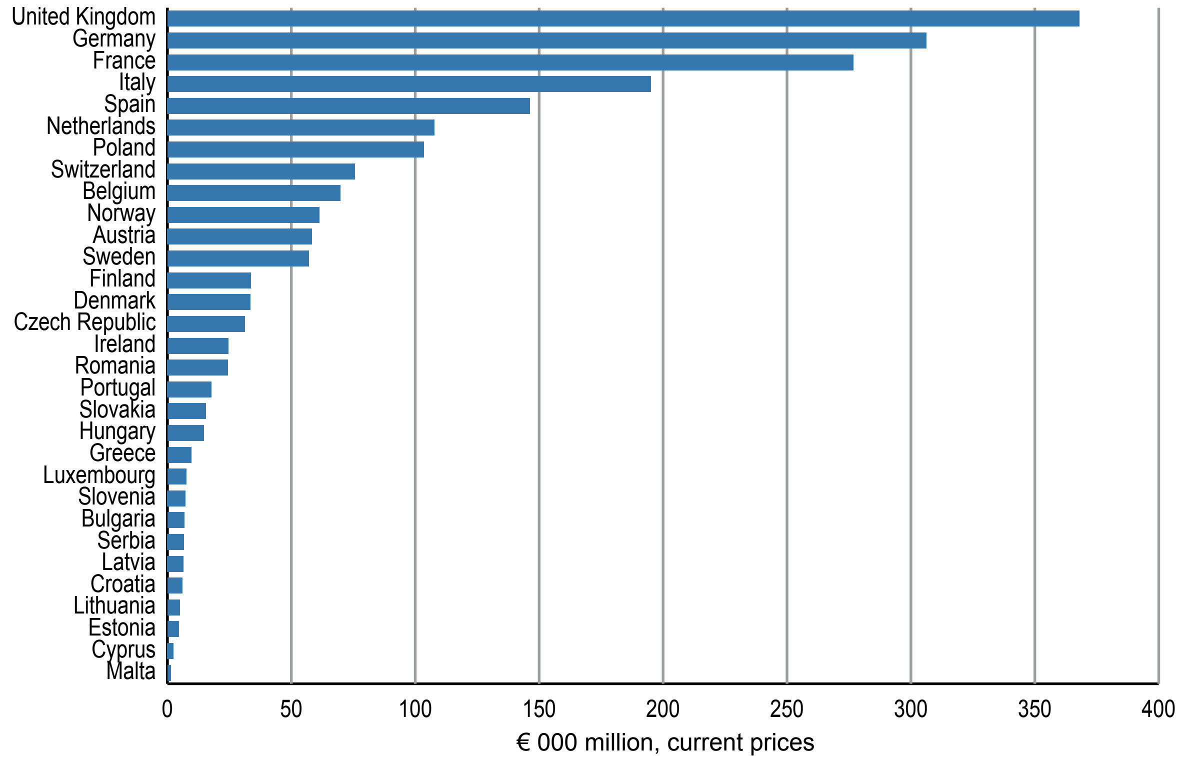
Aalto University Väre building
Place: Espoo (Finland)
Architect: Verstas Architects
Photo: Maurizio Tami

2.1 THE CONSTRUCTION MARKET IN EUROPE

The total value of the European construction market ('EUROPE - 31') is estimated to be worth €2,085 billion in 2018. This includes civil engineering and infrastructure work.

There are four countries - the UK, Germany, France and Italy - which together account for more than half of Europe's total construction output. Significant volumes of construction work are also recorded in Spain, the Netherlands and Poland. When measured per head of the general population, the highest values per head are recorded in Luxembourg and Norway.

CHART 2-1
ESTIMATED SIZE OF EUROPE CONSTRUCTION MARKET 2018



Base: all 31 European countries
Source: Mirza & Nacey estimates based on data sourced from Eurostat updated using the most recent Eurostat Construction Output Production Indices.

TABLE 2-1
SIZE OF CONSTRUCTION MARKET MILLIONS OF EUROS CURRENT PRICES

€ million	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017 *	2018 **
Austria	45 137	43 927	43 654	44 932	46 813	47 248	48 263	50 171	51 342	54 338	58 318
Belgium	58 141	58 062	59 531	66 014	65 947	65 253	66 685	67 913	71 325	68 495	69 845
Bulgaria	11 767	10 397	7 967	7 829	7 765	6 608	7 788	9 211	6 401	6 813	6 775
Croatia	10 397	8 810	6 845	6 413	5 886	5 561	5 378	5 473	5 794	5 826	6 046
Cyprus	5 280	4 152	3 930	3 374	2 786	2 041	1 832	1 890	1 993	2 544	2 490
Czech Republic	36 672	32 024	33 084	32 512	28 949	26 880	26 125	28 310	27 331	29 660	31 278
Denmark	32 470	27 244	25 679	27 394	27 622	27 472	28 434	29 504	31 320	32 782	33 425
Estonia	3 548	2 285	2 025	2 658	3 053	3 106	3 044	3 006	3 241	3 973	4 574
Finland	31 819	27 570	27 998	30 130	30 303	29 728	28 832	29 800	32 675	35 057	33 745
France	283 736	264 335	264 969	279 230	279 221	282 417	277 398	270 528	272 223	279 807	276 669
Germany	221 117	221 003	231 376	251 671	260 057	264 450	276 494	279 630	295 079	312 605	306 168
Greece	34 799	31 780	20 959	16 868	14 960	12 731	10 366	9 100	10 533	10 121	9 621
Hungary	11 892	10 296	9 160	8 672	7 945	8 806	9 852	10 246	9 473	12 220	14 655
Ireland	41 004	16 526	13 682	10 312	10 297	10 840	16 296	17 030	19 404	21 646	24 519
Italy	277 718	257 869	253 789	255 297	229 554	212 194	199 654	196 261	193 574	197 517	195 035
Latvia	7 883	4 456	3 589	4 505	4 835	5 108	5 427	5 215	4 280	4 949	6 518
Lithuania	6 353	3 070	2 754	3 408	3 333	3 782	4 424	4 320	3 981	4 243	4 984
Luxembourg	5 127	5 009	4 869	5 382	5 207	5 418	6 031	6 694	7 165	7 364	7 616
Malta	780	781	793	828	841	857	996	1 077	1 085	1 197	1 300
Netherlands	99 184	96 582	87 770	91 512	84 506	79 607	80 907	84 840	92 352	98 460	107 798
Norway	43 746	37 109	40 974	47 973	57 008	57 100	56 496	55 646	57 609	58 099	61 260
Poland	77 321	65 288	77 417	84 489	79 472	75 103	77 002	80 993	78 359	84 857	103 477
Portugal	33 674	30 992	30 333	27 104	20 763	18 284	16 878	17 015	17 036	17 019	17 832
Romania	34 195	28 589	30 652	28 722	30 276	28 011	23 587	27 510	27 681	24 297	24 414
Serbia	6 620	4 946	4 551	5 471	5 144	4 613	4 619	5 051	5 324	5 391	6 727
Slovakia	14 213	13 918	13 351	13 755	12 775	11 959	12 839	15 205	14 819	14 787	15 430
Slovenia	9 830	8 240	7 084	6 101	5 654	5 285	5 536	5 553	5 347	5 913	7 309
Spain	328 204	281 543	213 668	176 656	147 747	132 271	136 188	142 478	144 793	145 211	146 327
Sweden	40 263	33 516	39 956	43 729	44 906	45 418	46 639	49 285	52 489	57 979	57 032
Switzerland	39 386	42 078	48 032	57 474	60 352	60 829	63 391	72 426	71 016	72 513	75 721
United Kingdom	282 047	220 016	235 533	241 633	265 967	264 347	299 278	362 113	336 399	361 425	367 926
EUROPE - 31 (€ 000 million)	2 134	1 892	1 846	1 882	1 850	1 803	1 847	1 943	1 951	2 037	2 085

Source of all data: Eurostat National Accounts - output at current prices.

* Data for several countries 2017 (and Sweden 2016): Mirza & Nacey estimates derived from the most recent Eurostat Construction Output Production Indices.

** Data for 2018: Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices.

Construction output includes civil engineering and infrastructure work.

Construction output in Europe-31 is rising, but still remains lower than it was in 2008. The last two years have seen consistent growth in output, and the trend is clearly up. Output is rising in most countries, with the fastest growth between 2016 and 2018 recorded in Poland. It is a similar picture of growth for the majority of countries between 2017 and 2018, although in two of the largest - France and Germany - output is estimated to be slightly lower in 2018 than it was in 2017.

CHART 2-2
CHANGE IN CONSTRUCTION OUTPUT IN EUROPE-31 2008 TO 2018

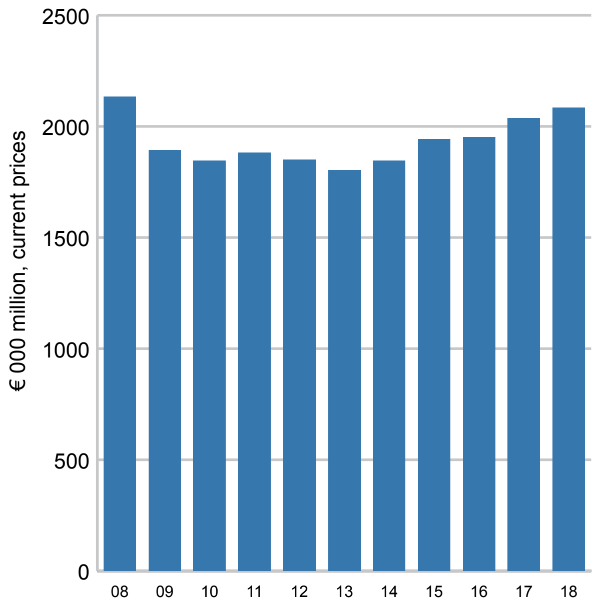
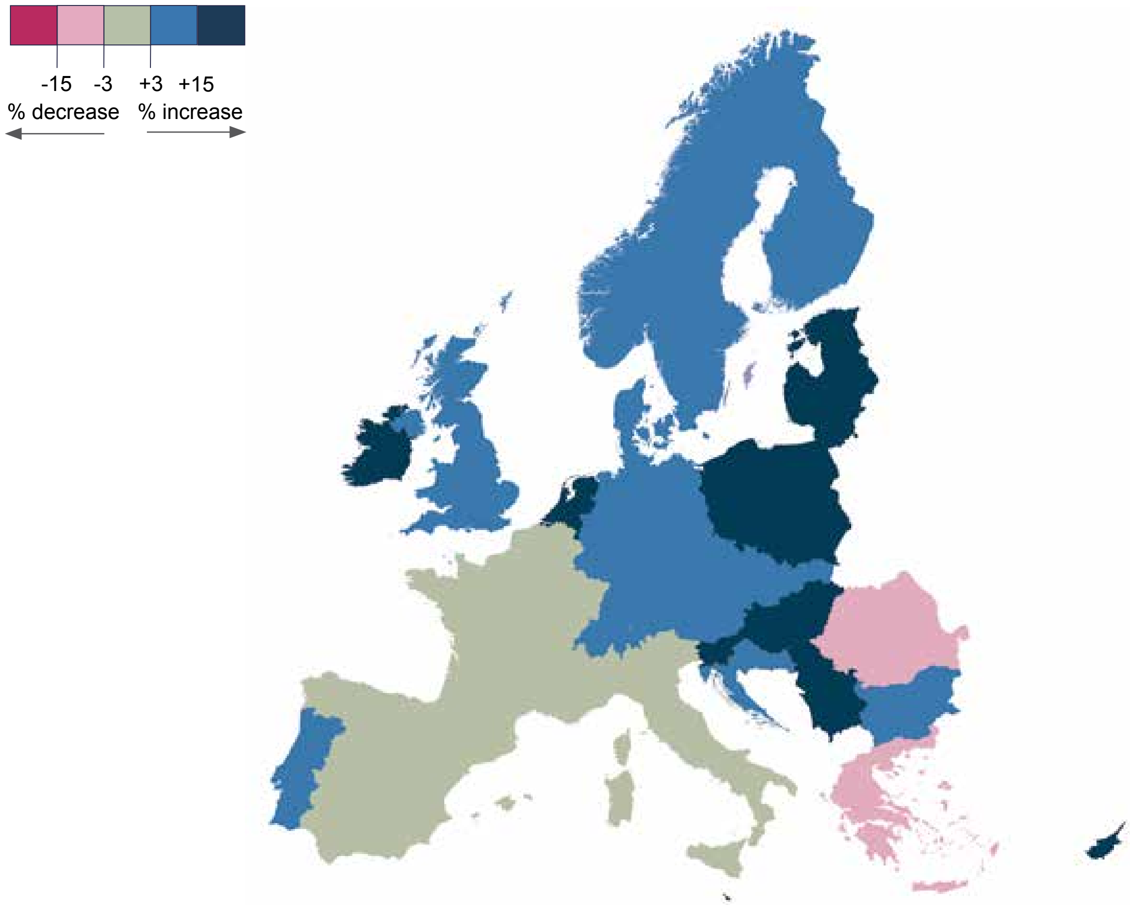


CHART 2-3
CHANGES IN CONSTRUCTION OUTPUT 2016 TO 2018



Base for both map above and chart left: all 31 European countries
Source: Mirza & Nacey estimates based on data sourced from Eurostat updated using the most recent Eurostat Construction Output Production Indices.

TABLE 2-2

ESTIMATED SIZE OF CONSTRUCTION MARKET 2018 BY COUNTRY AND COMPARATIVE VALUES

	construction output (estimated € million)	population (number as at 01.01.2018)	construction output per head of population (€)	architects (estimated number)
Austria	58 318	8 822 267	6 610	5 400
Belgium	69 845	11 413 058	6 120	14 800
Bulgaria	6 775	7 050 034	961	2 000
Croatia	6 046	4 105 493	1 473	2 200
Cyprus	2 490	864 236	2 881	950
Czech Republic	31 278	10 610 055	2 948	8 300
Denmark	33 425	5 781 190	5 782	10 300
Estonia	4 574	1 319 133	3 467	800
Finland	33 745	5 513 130	6 121	3 600
France	276 669	67 221 943	4 116	30 000
Germany	306 168	82 850 000	3 695	111 200
Greece	9 621	10 738 868	896	18 500
Hungary	14 655	9 778 371	1 499	4 200
Ireland	24 519	4 838 259	5 068	2 500
Italy	195 035	60 483 973	3 225	160 000
Latvia	6 518	1 934 379	3 369	820
Lithuania	4 984	2 808 901	1 774	1 400
Luxembourg	7 616	602 005	12 651	950
Malta	1 300	475 701	2 733	1 006
Netherlands	107 798	17 118 084	6 297	10 600
Norway	61 260	5 295 619	11 568	3 825
Poland	103 477	37 976 687	2 725	14 000
Portugal	17 832	10 291 027	1 733	23 000
Romania	24 414	19 523 621	1 250	9 900
Serbia	6 727	7 001 444	961	8 000
Slovakia	15 430	5 443 120	2 835	1 730
Slovenia	7 309	2 066 880	3 536	1 380
Spain	146 327	46 659 302	3 136	55 700
Sweden	57 032	10 120 242	5 635	6 750
Switzerland	75 721	8 482 152	8 927	7 400
United Kingdom	367 926	66 238 007	5 555	41 000
EUROPE - 31 - 2018	2 084 835	533 427 181	3 908	562 211

Source: Construction output and population data - Eurostat Data for 2018 are Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices.
The total for EUROPE-31 is Mirza & Nacey estimate.

Construction output includes civil engineering and infrastructure work.

2.2 THE ARCHITECTURAL MARKET IN EUROPE

Just as the construction market is expanding, so too is the architectural market. The market has now been rising for the past three surveys, and the pattern emerging is that the construction market moves relatively gradually while the architectural market is prone to rather more exaggerated moves. It is also evident that there is a lag between movement in construction and a corresponding movement in the architectural market. The total value of the architectural market in Europe-31 is estimated to be €16.4 billion in 2018. This relates to the total turnover, or value of the revenue generated by the profession. Each individual country figure is an estimate and should be considered with caution. The estimate has been grossed-up from survey data (see Appendix I for methodology).

The largest architectural markets are Germany, the UK, Italy, France and the Netherlands. These five countries have consistently remained the five largest markets over the last ten years.

CHART 2-4
VALUE OF ARCHITECTURAL MARKET AVERAGE PER ARCHITECT

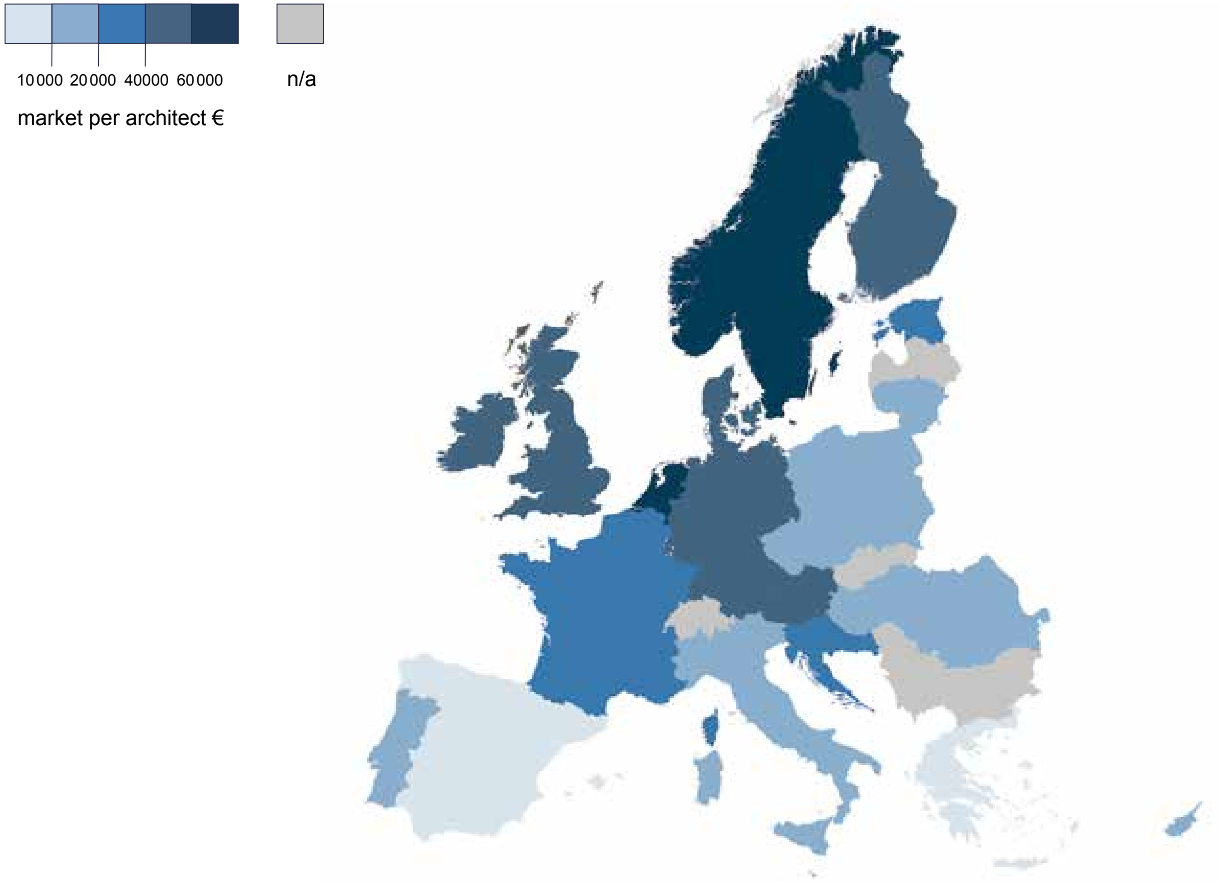
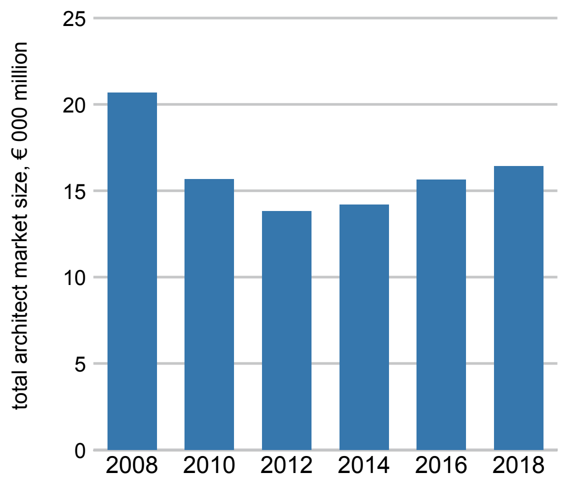


CHART 2-5
CHANGES 2008 TO 2018 IN ESTIMATED VALUE OF ARCHITECTURAL MARKET IN EUROPE-31



Base: all 31 European countries
Source: Mirza & Nacey estimates based on survey data

Note: The base 'EUROPE-31' is different from the base used for previous surveys. Figures for previous years have been re-calculated using the 2018 base number of countries so will be different from estimates published in previous survey reports.

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TABLE 2-3

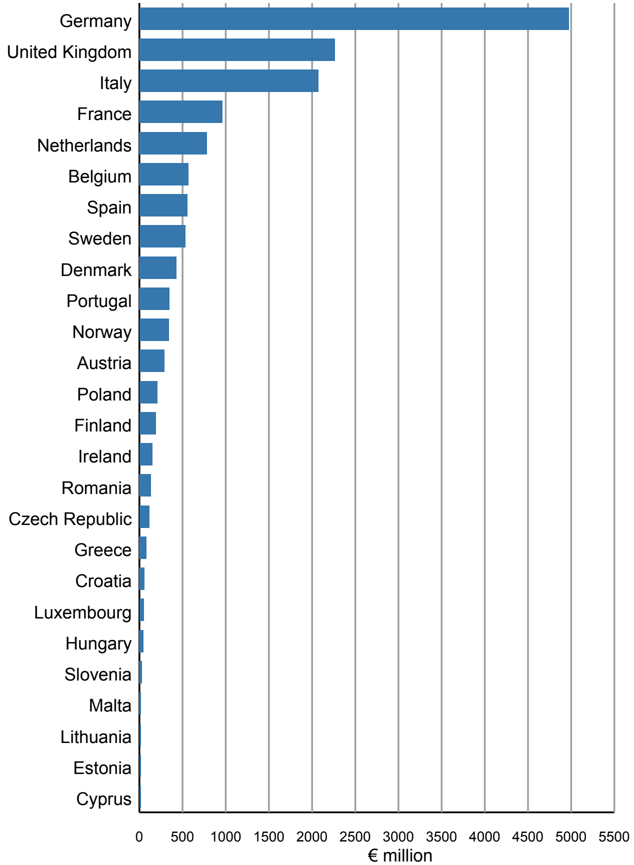
ESTIMATED SIZE OF ARCHITECTURAL MARKET 2018 BY COUNTRY AND COMPARATIVE VALUES

	market size (€000s)	value per architect (€)	value per 1000 population (€)	architectural market as per cent construction	*2016 market size (€000s)*	*2014 market size (€000s)*	*2012 market size (€000s)*	*2010 market size (€000s)*	*2008 market size (€000s)*
Austria	287 174	53 180	32 551	0.49	*279 307*	*281 241*	*262 774*	*256 292*	*296 789*
Belgium	569 489	38 479	49 898	0.82	*610 346*	*436 306*	*529 292*	*556 280*	*327 108*
Croatia	59 602	27 092	14 518	0.99	*54 841*	*44 798*	*50 235*	*64 290*	*n/a*
Cyprus *	16 694	17 573	19 317	0.67	*17 859*	*n/a*	*n/a*	*n/a*	*n/a*
Czech Republic	112 931	13 606	10 644	0.36	*92 210*	*139 458*	*153 433*	*73 045*	*n/a*
Denmark	429 470	41 696	74 288	1.28	*482 321*	*392 062*	*447 607*	*308 697*	*356 228*
Estonia *	16 730	20 912	12 682	0.37	*14 396*	*16 330*	*29 277*	*12 667*	*27 524*
Finland	188 952	52 487	34 273	0.56	*178 017*	*133 689*	*161 704*	*117 456*	*42 580*
France	961 483	32 049	14 303	0.35	*984 215*	*907 837*	*1 254 376*	*1 301 699*	*1 103 778*
Germany	4 970 740	44 701	59 997	1.62	*5 015 212*	*5 047 349*	*4 192 657*	*4 094 601*	*3 988 103*
Greece	82 696	4 470	7 701	0.86	*n/a*	102 646	170 961	*289 623*	*294 149*
Hungary *	47 024	11 196	4 809	0.32	*33 267*	*n/a*	*60 566*	*n/a*	*n/a*
Ireland	149 498	59 799	30 899	0.61	*110 600*	*90 682*	*112 102*	*172 362*	*408 855*
Italy	2 072 306	12 952	34 262	1.06	*1 758 087*	*1 916 761*	*2 775 280*	*2 708 910*	*n/a*
Lithuania	16 850	12 036	5 999	0.34	*10 641*	*n/a*	*9 676*	*11 455*	*n/a*
Luxembourg *	49 588	52 198	82 372	0.65	*68 308*	*49 361*	*38 264*	*n/a*	*31 828*
Malta *	19 379	19 263	40 737	1.49	*9 659*	*13 050*	*15 565*	*n/a*	*13 320*
Netherlands	782 773	73 847	45 728	0.73	*939 867*	*910 000*	*807 000*	*976 000*	*902 000*
Norway	340 447	89 006	64 288	0.56	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*
Poland *	208 042	14 860	5 478	0.20	*212 481*	*n/a*	*210 575*	*258 803*	*n/a*
Portugal	348 279	15 143	33 843	1.95	*276 051*	*176 636*	*261 110*	*n/a*	*n/a*
Romania	135 682	13 705	6 950	0.56	*76 954*	*79 471*	*90 111*	*63 551*	*112 659*
Slovenia *	30 396	22 026	14 706	0.42	*35 700*	*24 874*	*42 110*	*10 359*	*40 501*
Spain	555 550	9 974	11 907	0.38	*461 124*	*332 999*	*336 420*	*n/a*	*n/a*
Sweden	532 201	78 845	52 588	0.93	*470 484*	*347 110*	*330 785*	*356 300*	*145 073*
United Kingdom	2 265 051	55 245	34 196	0.62	*2 169 202*	*1 978 835*	*2 006 403*	*1 955 929*	*2 800 042*
2018 EUROPE-26	15 249 028	28 121	30 285	0.77					
2016 EUROPE-27	*15 603 101*	*27 300*	*26 651*	*0.9*	*15 603 101*				
2014 EUROPE-26	*14 340 253*	*26 109*	*27 176*	*0.9*		*14 340 253*			
2012 EUROPE-25	*14 424 668*	*27 770*	*25 870*	*1.0*			*14 424 668*		
2010 EUROPE-23	*14 636 411*	*33 253*	*28 716*	*1.1*				*14 636 411*	
2008 EUROPE-17	*11 616 874*	*45 405*	*31 017*	*1.1*					*11 616 874*

'Market size' refers to the architectural market as measured as the sum of the turnover earned by private architectural practices in each country. Data refers to 2017/18. The market size has been estimated see Appendix for an explanation of the methodology.
* caution - small sample

CHART 2-6

ESTIMATED VALUE OF ARCHITECTURAL MARKET



2.3 THE ARCHITECTURAL MARKET ANALYSED BY TYPE & SECTOR

Refurbishment is more important, overall, for architects than new build. Refurbishment accounts for 59 per cent of work, new build for 41 per cent. This is exactly the same split as was recorded in the previous survey. Refurbishment work is not universally dominant - in more than half of the countries, new build accounts for more 50 per cent of all work. The importance of refurbishment is slightly inflated by Italy, where refurbishment work accounts for 78 per cent of all work. Poland stands out as having a particularly large volume of new build work; 86 per cent.

The largest building sector, by quite some margin, is private housing. And within private housing, work to individual houses dominates. More than one third of architects' total work (36 per cent) relates to individual houses, and another 18 per cent is other private housing. Private housing is the most important sector in every country, and in sixteen out of the 27 countries it accounts for more than half of all work. By contrast, in Finland and Sweden this sector is much less important, accounting for less than 15 per cent of work. Commercial, other private and mixed projects account for 30 per cent of architects' work, which varies less between the countries although is highest in Estonia and Sweden (over 40 per cent) and lowest in Belgium (14 per cent).

Health, education, public housing and other public represents 17 per cent of architects' work. It is more than twice this proportion in Finland, Denmark and, due to a high volume of public housing, Austria. The lowest proportion of public sector work is reported by architects in Spain, Portugal and Cyprus.

TABLE 2-4
PROPORTION OF WORK UNDERTAKEN
BY BUILDING TYPE ANALYSED BY COUNTRY

per cent	new build	refurbishment
Austria	57	43
Belgium	43	57
Croatia	56	44
Cyprus *	77	23
Czech Republic	54	46
Denmark	43	57
Estonia *	70	30
Finland	58	42
France	43	57
Germany	46	54
Greece	37	63
Hungary *	64	36
Ireland	49	51
Italy	22	78
Lithuania	68	32
Luxembourg *	57	43
Malta *	57	43
Netherlands	53	47
Norway	65	35
Poland *	86	14
Portugal	42	58
Romania	64	36
Slovenia *	57	43
Spain	48	52
Sweden	57	43
United Kingdom	41	59
2018 EUROPE-26	41	59
2016 EUROPE-27	*41*	*59*
2014 EUROPE-26	*37*	*63*
2012 EUROPE-25	*n/a*	*n/a*
2010 EUROPE-23	*n/a*	*n/a*
2008 EUROPE-17	*n/a*	*n/a*

* caution - small sample

TABLE 2-5
MARKET SHARE AND INVOLVEMENT
BY BUILDING SECTOR

per cent	per cent of market	per cent of practices involved
private housing	54	88
offices	8	34
retail	5	21
leisure and the arts	4	15
industrial	6	23
health	3	12
education	6	20
public housing	3	12
other private	8	29
other public	4	13

involved = have worked on at least one job in this sector in year

CHART 2-7
PROPORTION OF MARKET BY BUILDING SECTOR

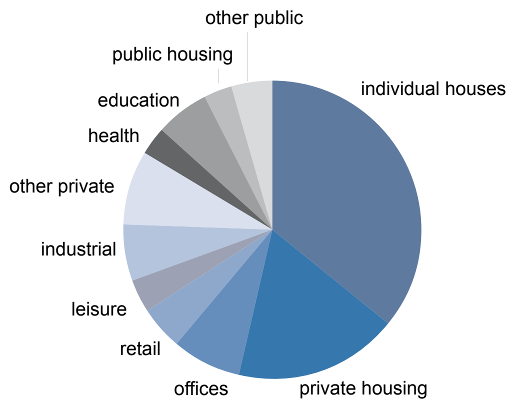
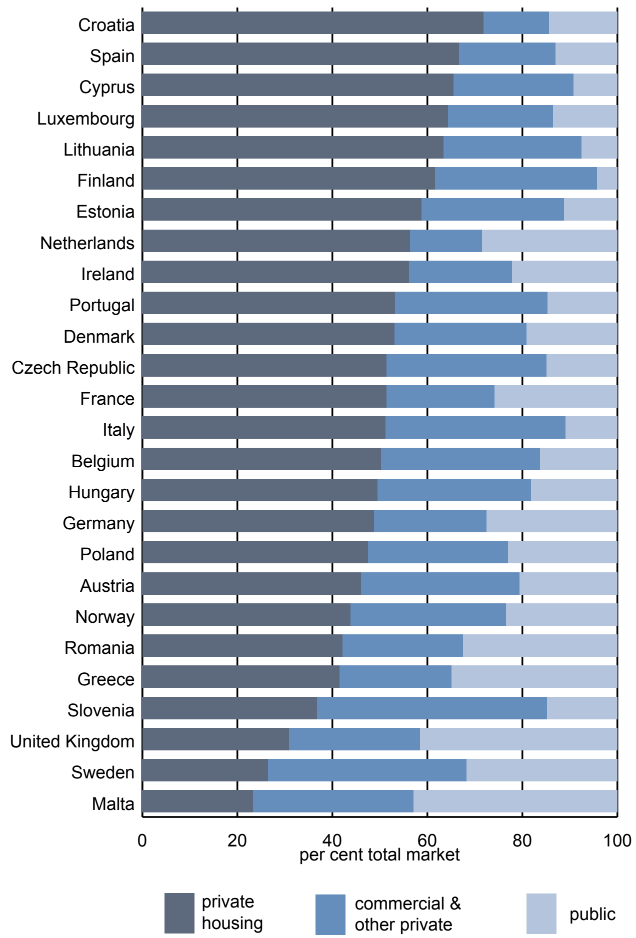


TABLE 2-6
PROPORTION OF WORK UNDERTAKEN BY BUILDING SECTOR ANALYSED BY COUNTRY

per cent	individual houses extensions loft conversions	private housing	offices	retail	leisure	industrial	health	education	public housing	other private	other public	TOTAL
Austria	29	12	7	4	2	5	4	9	14	5	7	100
Belgium	55	17	3	3	1	4	2	5	4	2	4	100
Croatia	36	17	8	1	4	5	2	5	2	10	11	100
Cyprus *	45	16	11	11	10	1	1	1	0	1	2	100
Czech Republic	29	15	9	4	7	9	2	7	2	4	12	100
Denmark	17	14	8	1	4	5	5	5	6	10	26	100
Estonia *	26	11	14	8	7	10	5	0	7	9	3	100
Finland	14	10	12	7	5	4	6	13	10	7	13	100
France	35	16	6	5	3	4	3	7	7	5	8	100
Germany	30	22	11	3	5	7	4	9	2	8	0	100
Greece	56	11	4	3	2	3	1	5	1	8	6	100
Hungary *	29	19	4	1	8	12	6	8	3	4	7	100
Ireland	43	13	6	5	2	3	5	9	6	6	2	100
Italy	42	17	5	7	2	5	1	2	1	11	7	100
Lithuania	30	16	11	4	6	6	3	5	3	6	9	100
Luxembourg *	40	16	8	3	2	1	3	10	8	1	7	100
Malta *	32	18	15	2	0	2	1	1	0	13	15	100
Netherlands	38	11	4	3	4	6	5	5	8	7	10	100
Norway	24	18	7	3	5	8	10	10	3	3	9	100
Poland *	31	22	8	0	0	8	0	3	4	16	8	100
Portugal	52	12	4	9	4	5	2	2	1	7	3	100
Romania	38	12	5	6	3	11	3	5	5	8	3	100
Slovenia *	44	7	17	5	3	11	1	3	1	3	6	100
Spain	51	14	6	8	1	4	2	3	1	6	4	100
Sweden	13	14	16	7	7	4	5	8	10	8	8	100
United Kingdom	49	16	5	4	5	3	2	5	2	6	4	100
2018 EUROPE-26	36	18	8	5	4	6	3	6	3	8	4	100
2016 EUROPE-27	*39*	*16*	*7*	*7*	*4*	*5*	*3*	*4*	*2*	*9*	*6*	*100*
2014 EUROPE-26	*40*	*13*	*6*	*6*	*3*	*6*	*3*	*5*	*3*	*7*	*9*	*100*
2012 EUROPE-25	*42*	*9*	*6*	*6*	*3*	*5*	*2*	*4*	*3*	*9*	*11*	*100*
2010 EUROPE-23	*30*	*14*	*8*	*5*	*4*	*6*	*4*	*6*	*6*	*7*	*10*	*100*
2008 EUROPE-17	*31*	*14*	*10*	*5*	*3*	*8*	*4*	*6*	*4*	*7*	*10*	*100*

* caution - small sample

CHART 2-8
PROPORTION OF WORK UNDERTAKEN IN EACH MAIN BUILDING SECTOR RANKED IN ORDER OF HIGHEST PRIVATE HOUSING WORK



2.4 THE ARCHITECTURAL MARKET ANALYSED BY TYPE OF CLIENT

Just over half of architects' work is for Individual clients, a proportion which has been increasing steadily since 2010. Public sector clients account for 17 per cent of work, similar to the level recorded in the last three surveys but lower than in 2008 and 2010. Fifteen per cent of clients are limited companies or PLCs, while 10 per cent of work is generated by developers.

CHART 2-9
PROPORTION OF MARKET BY CLIENT TYPE

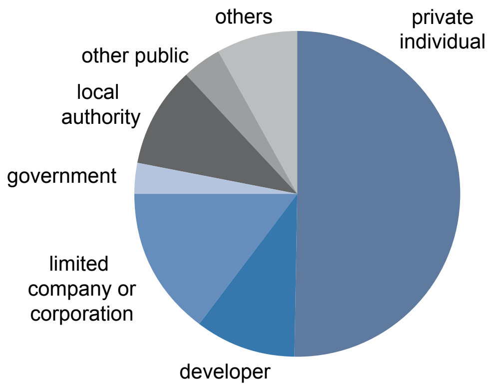


TABLE 2-7
MARKET SHARE AND INVOLVEMENT BY CLIENT TYPE

per cent	per cent of market	per cent of practices involved
individuals	51	87
developer	10	30
limited company / PLC	15	38
central government	3	8
local government	10	27
other public	4	12
other private	8	22

involved = have worked for at least one of these clients in year

TABLE 2-8
PROPORTION OF WORK UNDERTAKEN FOR DIFFERENT CLIENTS ANALYSED BY COUNTRY

per cent	individuals	developer	limited company or corporation (PLC)	central government	local government	other public	other private	TOTAL
Austria	42	12	17	14	9	3	4	100
Belgium	61	12	11	2	6	7	3	100
Croatia	44	3	27	2	14	6	4	100
Cyprus *	60	16	16	2	4	0	1	100
Czech Republic	41	15	12	2	21	6	3	100
Denmark	21	18	12	13	19	10	8	100
Estonia *	30	27	36	0	3	4	0	100
Finland	17	17	28	6	14	17	2	100
France	44	13	12	1	10	14	7	100
Germany	48	9	17	4	14	0	9	100
Greece	73	8	7	2	5	2	6	100
Hungary *	38	13	27	5	17	0	5	100
Ireland	47	18	12	7	7	7	4	100
Italy	60	8	13	1	4	6	9	100
Lithuania	41	8	32	5	8	4	3	100
Luxembourg *	37	28	8	6	16	4	1	100
Malta *	40	25	16	4	0	1	14	100
Netherlands	41	20	13	2	7	8	9	100
Norway	28	25	10	6	19	8	4	100
Poland *	43	22	24	0	11	0	0	100
Portugal	55	13	20	1	4	4	3	100
Romania	49	14	25	1	5	4	4	100
Slovenia *	47	3	31	2	9	3	4	100
Spain	63	12	12	0	9	4	2	100
Sweden	22	21	25	4	15	11	1	100
United Kingdom	50	20	10	2	4	7	8	100
2018 EUR-26	51	10	15	3	10	4	8	100
2016 EUR-27	*52*	*10*	*15*	*3*	*8*	*6*	*7*	*100*
2014 EUR-26	*50*	*8*	*18*	*4*	*8*	*6*	*6*	*100*
2012 EUR-25	*45*	*11*	*19*	*2*	*8*	*8*	*6*	*100*
2010 EUR-23	*41*	*12*	*18*	*4*	*10*	*9*	*6*	*100*
2008 EUR-17	*47*	*10*	*14*	*6*	*9*	*7*	*7*	*100*

* caution - small sample

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2.5 THE ARCHITECTURAL MARKET ANALYSED BY TYPE OF SERVICE

Two thirds of architects' work relate to building design; this is the most important type of service offered by architects in every country. In most countries, building design accounts for at least 60 per cent of work, but in Italy and Malta it is a substantially lower proportion - although still the most important service type offered.

Of the other service types, only interior design is significant. Ten per cent of work relates to interior design - double this proportion in Italy and Greece. Less than 5 per cent of architects' work in Europe relates to other service types. In Sweden, 10 per cent of work is planning; over 10 per cent of work in Malta and Lithuania relate to project management; and over 10 per cent of work in Denmark is landscape design.

CHART 2-10
PROPORTION OF MARKET BY TYPE OF SERVICE

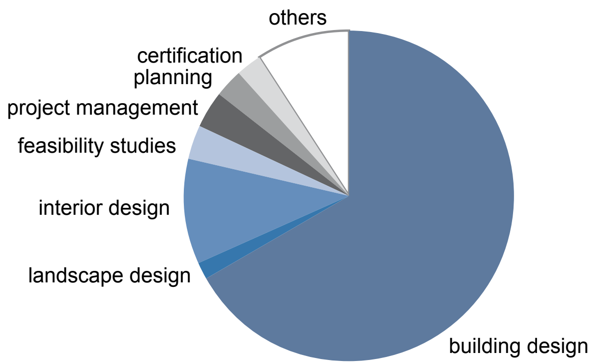


TABLE 2-9
PROPORTION OF WORK UNDERTAKEN BY EACH SERVICE TYPE

per cent	building design	landscape design	interior design	feasibility studies	project management	planning	certification	property valuation	other service	TOTAL
Austria	75	2	4	5	3	2	3	1	4	100
Belgium	78	1	7	4	6	0	0	0	4	100
Croatia	65	4	10	0	3	5	3	0	9	100
Cyprus *	76	3	14	1	4	1	0	1	0	100
Czech Republic	58	9	13	1	3	11	0	0	4	100
Denmark	47	12	6	3	8	6	1	1	16	100
Estonia *	73	2	13	0	7	2	2	0	0	100
Finland	71	1	6	1	3	9	0	0	8	100
France	71	1	9	7	4	3	0	0	5	100
Germany	86	1	4	0	1	1	2	1	4	100
Greece	48	4	20	2	6	1	3	3	14	100
Hungary *	65	6	7	3	1	0	8	0	10	100
Ireland	71	2	5	5	3	2	4	0	9	100
Italy	41	3	21	5	6	3	4	5	13	100
Lithuania	55	7	12	3	12	9	0	0	2	100
Luxembourg *	63	2	5	6	10	7	5	1	3	100
Malta *	32	2	15	4	19	3	3	9	14	100
Netherlands	63	2	10	7	8	2	0	0	8	100
Norway	68	5	5	8	5	7	1	0	2	100
Poland *	92	0	0	3	2	3	0	0	0	100
Portugal	60	1	12	4	5	6	4	1	7	100
Romania	66	2	11	6	4	7	1	0	3	100
Slovenia *	62	3	10	7	10	6	0	1	2	100
Spain	66	1	6	1	3	4	10	3	7	100
Sweden	64	1	9	5	1	12	1	0	5	100
United Kingdom	65	1	5	7	7	2	2	0	12	100
2018 EUR-26	67	2	10	3	4	3	2	2	7	100
2016 EUR-27	*62*	*2*	*11*	*3*	*4*	*3*	*3*	*2*	*9*	*100*
2014 EUR-26	*57*	*3*	*11*	*4*	*5*	*4*	*4*	*2*	*11*	*100*
2012 EUR-25	*50*	*2*	*14*	*6*	*7*	*6*	*n/a*	*n/a*	*16*	*100*
2010 EUR-23	*69*	*2*	*8*	*4*	*6*	*7*	*n/a*	*n/a*	*4*	*100*
2008 EUR-17	*66*	*3*	*9*	*3*	*5*	*4*	*n/a*	*n/a*	*9*	*100*

* caution - small sample

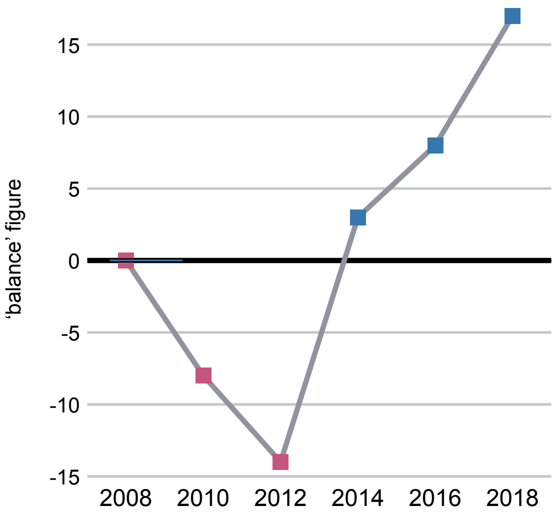
2.6 FUTURE PROSPECTS

Architects' confidence in future prospects for work in the coming year, 2019, is currently high. The chart below plots how confidence has changed over the past ten years, and the latest 'balance' figure - the difference between the optimists and the pessimists - is +17.

At least half of architects in Malta, Ireland and Luxembourg expect workloads to rise in 2019 and it is these three countries, together with Norway, which score the highest positive 'balance' figures.

The 'balance' figure is negative in only three out of the 26 countries this year. These are Finland, the Czech Republic and Italy. In Finland and Italy, as well as the United Kingdom, at least 20 per cent of respondents expect workloads to fall in 2019.

CHART 2-11
CHANGE IN WORKLOAD PREDICTIONS
(BALANCE FIGURE).
ALL SURVEY COUNTRIES 2008 TO 2018 SURVEYS
(workload predictions made in survey year
for the following year)



The 'balance' statistic is calculated by subtracting the per cent of respondents who predict workloads will fall from those who predict a rise

CHART 2-12
WORKLOAD PREDICTIONS FOR 2019

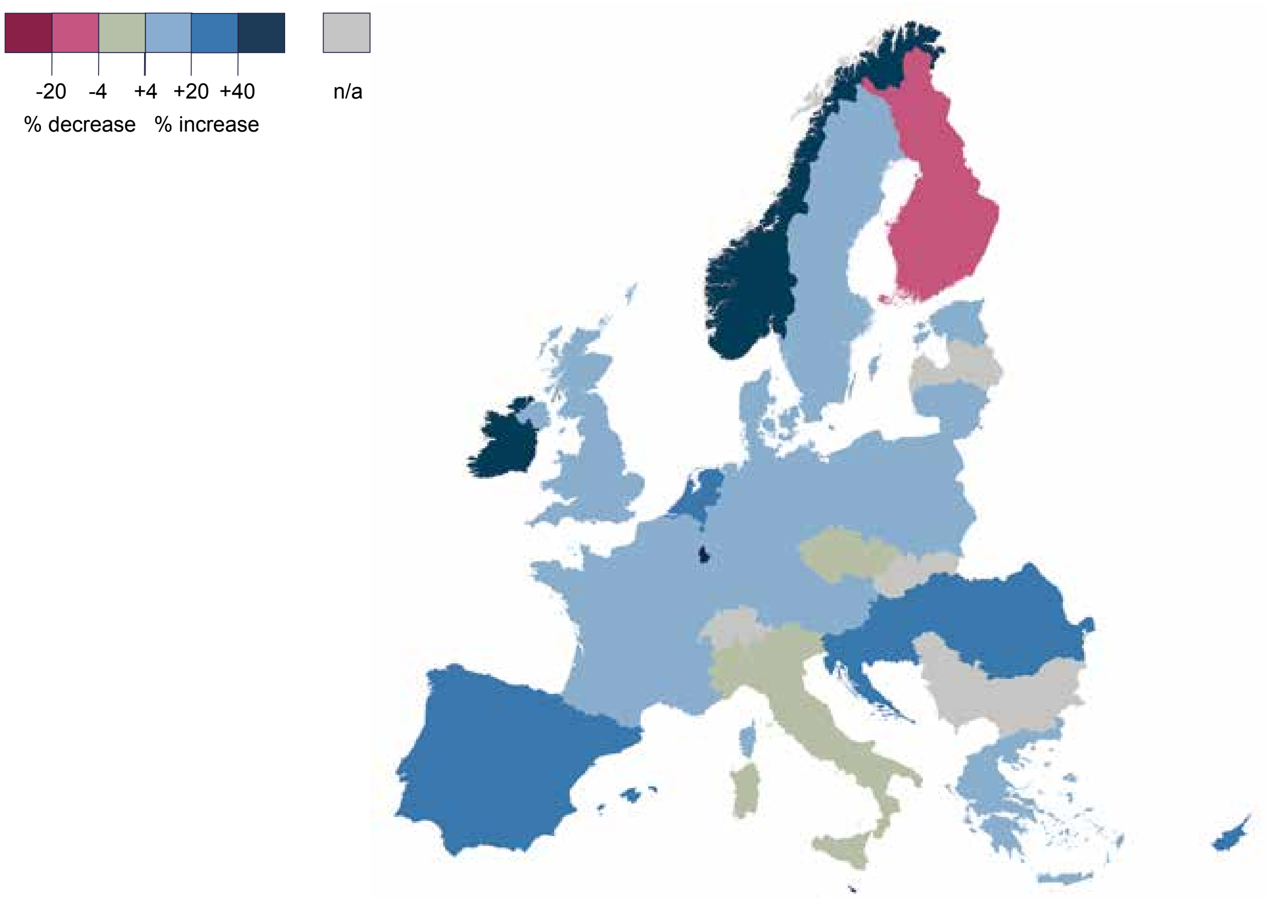


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TABLE 2-10
FUTURE WORKLOAD PROSPECTS FOR 2019 ANALYSED BY COUNTRY

per cent	per cent of Principals who expect their practice workloads to change over the coming 12 months			balance**
	rise	no change	fall	
Austria	29	56	15	+13
Belgium	31	54	15	+17
Croatia	40	52	8	+31
Cyprus *	38	63	0	+38
Czech Republic	15	66	19	-4
Denmark	33	53	14	+19
Estonia *	18	71	12	+6
Finland	14	66	21	-7
France	37	44	19	+18
Germany	30	59	11	+19
Greece	24	59	18	+6
Hungary *	39	44	17	+22
Ireland	58	33	9	+49
Italy	25	50	25	-1
Lithuania	33	53	15	+18
Luxembourg *	50	46	4	+46
Malta *	61	35	4	+57
Netherlands	47	45	8	+38
Norway	46	51	3	+44
Poland *	17	83	0	+17
Portugal	44	44	12	+33
Romania	48	43	10	+38
Slovenia *	41	52	7	+33
Spain	42	47	11	+31
Sweden	31	54	16	+15
United Kingdom	34	46	20	+14
2018 EUROPE-26	32	53	15	+17
2016 EUROPE-27	*31*	*46*	*23*	*+8*
2014 EUROPE-26	*28*	*47*	*25*	*+3*
2012 EUROPE-25	*21*	*43*	*35*	*-14*
2010 EUROPE-23	*24*	*44*	*32*	*-8*
2008 EUROPE-17	*28*	*45*	*28*	*0*

* caution - small sample
** 'balance' statistic is calculated by subtracting the per cent of respondents who predict workloads will fall from those who predict a rise

CHART 2-13
FUTURE WORKLOAD PROSPECTS FOR 2019

Countries ranked in order of the 'balance' statistic. The difference between the bars above and 100% = per cent expecting 'no change'.