

|2| ARCHITECTURE - THE MARKET



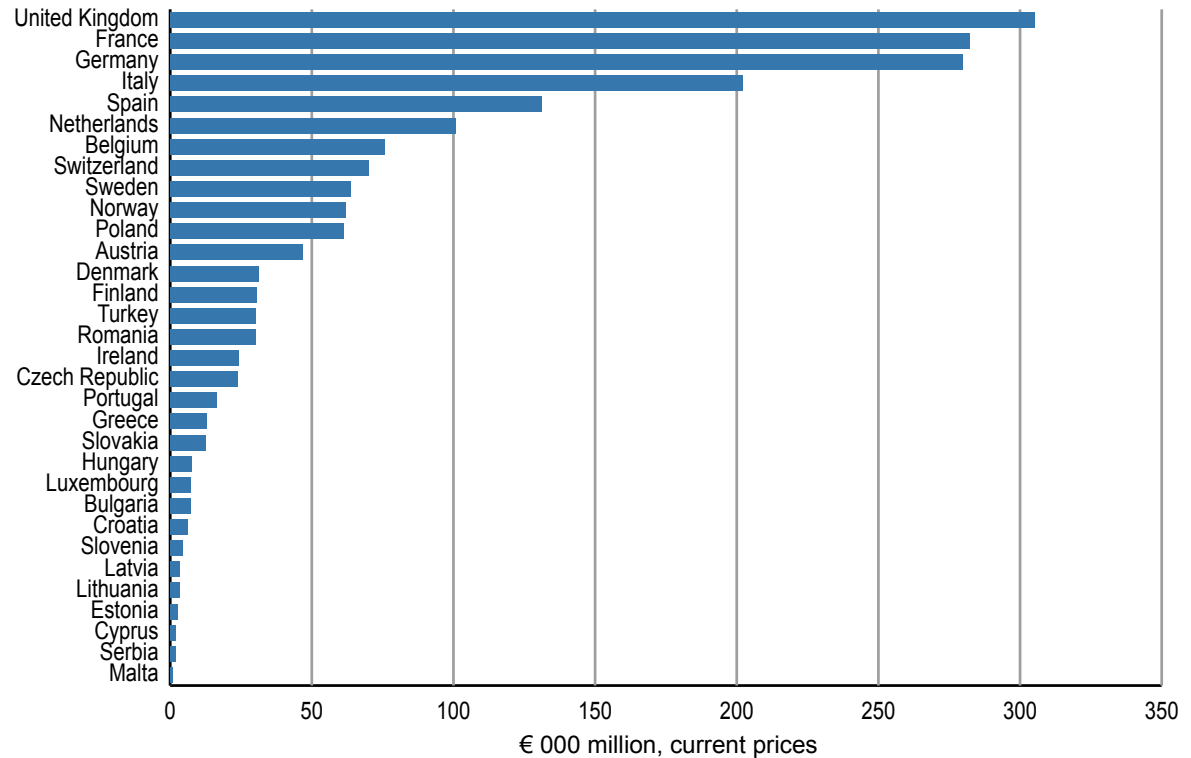
Architect: Aries Ltd
Project: Pine Beach Elo Reort
Photo: Tamas Bujnovszeky
Place: Pakoštane, Croatia

2.1 THE CONSTRUCTION MARKET IN EUROPE

The total value of the European construction market ('EUROPE - 32') is estimated to be worth €1 939 billion in 2016. This includes civil engineering and infrastructure work.

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

CHART 2-1
 ESTIMATED SIZE OF CONSTRUCTION MARKET, EUROPE, 2016



Base: all 32 European countries

Source: Mirza & Nacey estimates based on data sourced from Eurostat, Turkstat and Statistical Office of the Republic of Serbia updated using the most recent Eurostat Construction Output Production Indices.

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

€ million	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015 est *	2016 est **
Austria	37 042	40 603	45 137	43 928	43 654	44 931	46 814	47 257	48 248	48 527	46 745
Belgium	49 307	53 227	58 141	58 062	59 531	66 014	65 947	65 293	68 071	67 793	75 711
Bulgaria	6 363	8 851	11 767	10 397	7 966	7 828	7 764	6 603	7 790	8 003	7 067
Croatia	8 284	8 969	10 425	8 837	6 856	6 410	5 906	5 556	5 914	5 910	6 207
Cyprus	3 903	4 661	5 280	4 152	3 930	3 374	2 786	2 041	1 832	1 835	2 056
Czech Republic	26 523	32 020	36 672	32 024	33 084	32 512	28 949	26 880	26 125	28 460	23 658
Denmark	31 083	32 167	32 470	27 244	25 679	27 394	27 622	27 634	28 270	28 677	31 242
Estonia	3 031	3 780	3 548	2 285	2 025	2 658	3 084	3 178	3 085	2 923	2 768
Finland	25 752	29 703	31 819	27 570	27 998	30 130	30 303	29 728	28 794	29 216	30 558
France	247 409	270 093	283 736	264 335	264 969	279 230	279 221	282 417	275 235	267 244	282 377
Germany	199 117	207 877	221 117	221 003	231 376	251 671	260 057	264 450	274 340	278 365	279 619
Greece	43 009	41 191	34 799	31 780	20 959	16 868	14 960	12 731	11 395	10 866	12 926
Hungary	11 195	11 214	11 880	10 286	9 153	8 663	7 938	8 797	9 788	10 114	7 559
Ireland	47 720	49 642	41 004	16 526	12 096	10 877	14 816	16 949	19 236	20 738	24 200
Italy	261 318	274 065	277 718	257 869	253 789	255 297	229 554	212 194	199 657	199 335	202 126
Latvia	4 919	7 195	7 883	4 456	3 589	4 505	4 835	5 149	5 427	5 364	3 491
Lithuania	4 125	5 778	6 353	3 070	2 754	3 408	3 333	3 782	4 482	4 204	3 479
Luxembourg	4 186	4 868	5 135	4 998	4 859	5 379	5 210	5 416	6 173	6 694	7 284
Malta	716	724	780	781	793	828	842	857	878	1 018	1 043
Netherlands	83 751	91 580	98 935	96 326	87 521	91 131	83 931	79 002	80 232	85 041	100 870
Norway	34 054	41 319	43 746	37 109	40 974	47 973	57 008	57 100	56 496	57 316	61 934
Poland	46 309	59 062	73 104	62 183	77 413	84 485	79 460	75 085	76 333	77 218	61 170
Portugal	33 376	33 510	33 674	30 992	30 333	27 104	20 763	18 284	16 878	16 893	16 342
Romania	16 401	24 548	32 861	26 896	31 491	30 894	30 276	28 193	23 563	31 086	30 014
Serbia (1)	n/a	n/a	n/a	n/a	n/a	1 953	1 974	1 668	1 744	2 029	1 945
Slovakia	9 019	10 579	14 213	13 918	13 351	13 755	12 775	11 959	12 444	14 636	12 418
Slovenia	6 793	8 733	9 830	8 240	7 084	6 101	5 654	5 285	5 535	5 554	4 339
Spain	364 805	371 031	328 204	281 543	213 668	176 656	143 848	124 258	122 981	124 457	131 177
Sweden	36 720	41 164	40 263	33 516	39 956	43 729	44 906	45 418	46 639	52 717	63 559
Switzerland	36 542	36 152	39 328	42 081	48 034	57 474	60 352	60 878	63 391	72 159	70 218
Turkey (2)	18 184	23 315	23 572	16 958	23 120	24 752	27 160	27 753	27 495	28 737	30 221
United Kingdom	298 934	327 698	282 052	220 015	235 603	241 393	265 030	264 260	295 094	305 900	305 069
EUROPE - 32 (€ 000 million)	2 000	2 155	2 145	1 899	1 864	1 905	1 873	1 826	1 854	1 899	1 939

Source of all data except Turkey and Serbia: Eurostat, National Accounts (NACE 64) - aggregates at current prices. Copyright © Eurostat. All Rights Reserved.

* Data for 2015 (and, in some cases, 2014): Mirza & Nacey estimates derived from the most recent Eurostat Construction Output Production Indices.

** Data for 2016: Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices.

(1) Source: Derived from raw data sourced from Statistical Office of the Republic of Serbia. Raw data converted to Euros using conversion rates as at 30.06 each year.

(2) Source: Derived from raw data sourced from TurkStat, the Turkish Statistical Institute. Raw data (not reproduced here) is Copyright © TURKSTAT. Raw data converted from Turkish Lira to Euros using conversion rates as at 30.06 each year.

Construction output includes civil engineering and infrastructure work.

Construction output in Europe-32 has started to rise, very gradually, in the last four years. Whilst still a way short of the 2007-08 peak values, construction output is trending up. The rise between 2014 and 2016 is 5 per cent. The map, chart 2-3, shows a striking pattern of little or no change between 2014 and 2016 in several central European countries notably France, Germany and Italy; growth in countries on the northern, western and southern periphery of Europe; and falls in much of Eastern Europe. There are exceptions; construction output in Portugal continues to fall while Romania bucks the trend in the east to record rising values.

CHART 2-2
CHANGE IN CONSTRUCTION OUTPUT IN EUROPE-32, 2006 TO 2016

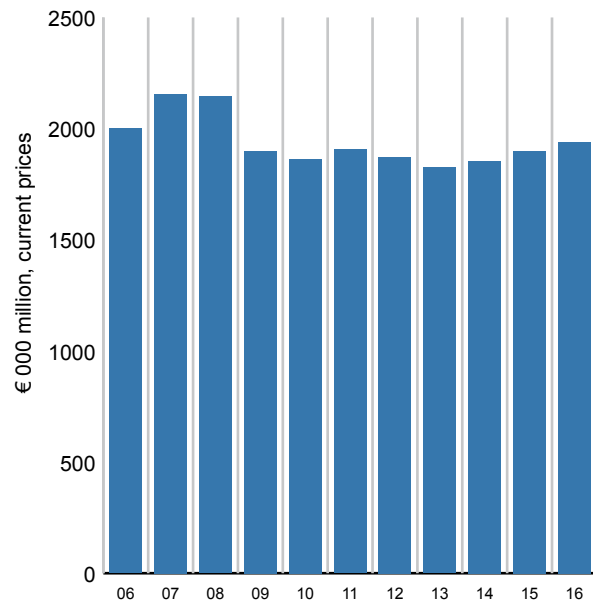
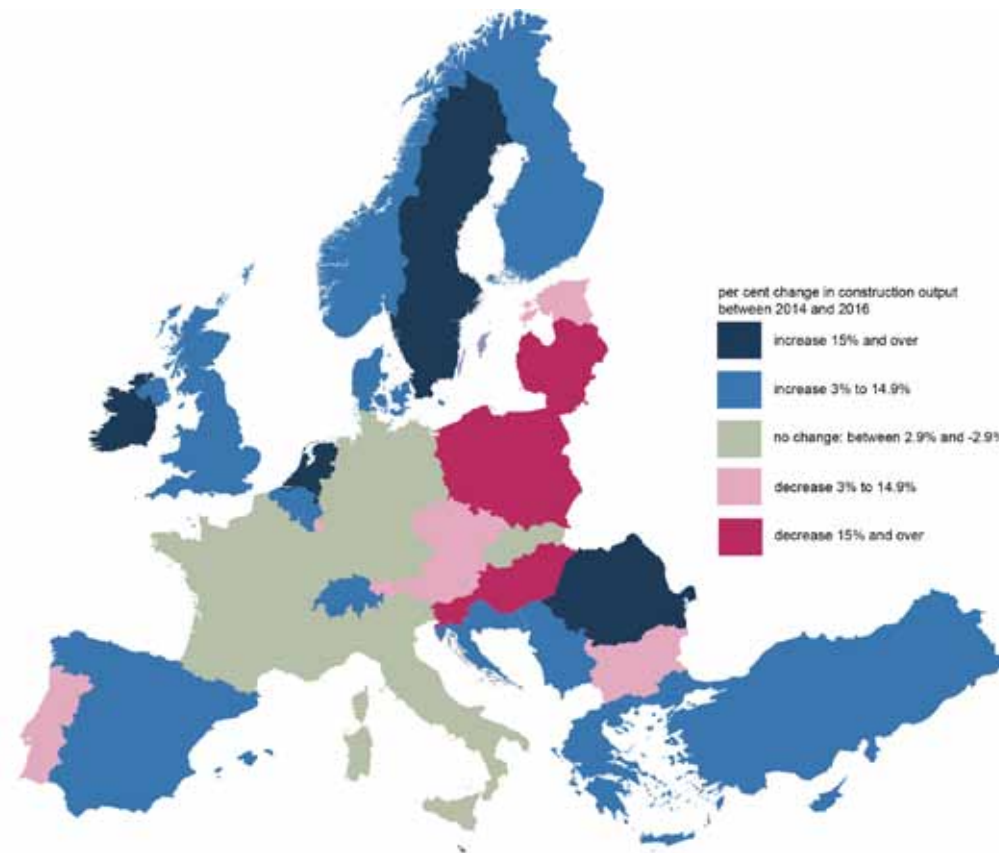


CHART 2-3
CHANGES IN CONSTRUCTION OUTPUT, 2014 TO 2016



Base for both map above and chart left: all 32 European countries
Source: Mirza & Nacey estimates based on data sourced from Eurostat, Turkstat and Statistical Office of the Republic of Serbia updated using the most recent Eurostat Construction Output Production Indices.



TABLE 2-2
ESTIMATED SIZE OF CONSTRUCTION MARKET, 2016 BY COUNTRY, AND COMPARATIVE VALUES

	construction output (estimated € million)	population (number as at 01.01.2016)	construction output per head of population (€)	architects (estimated number)
Austria	46 745	8 700 471	5 373	5 200
Belgium	75 711	11 289 853	6 706	15 100
Bulgaria	7 067	7 153 784	988	2 000
Croatia	6 207	4 190 669	1 481	2 200
Cyprus	2 056	848 319	2 424	950
Czech Republic	23 658	10 553 843	2 242	8 300
Denmark	31 242	5 707 251	5 474	10 000
Estonia	2 768	1 315 944	2 104	800
Finland	30 558	5 487 308	5 569	3 500
France	282 377	66 661 621	4 236	30 000
Germany	279 619	82 162 000	3 403	109 200
Greece	12 926	10 793 526	1 198	18 200
Hungary	7 559	9 830 485	769	4 200
Ireland	24 200	4 658 530	5 195	2 500
Italy	202 126	60 665 551	3 332	157 000
Latvia	3 491	1 968 957	1 773	900
Lithuania	3 479	2 888 558	1 204	1 350
Luxembourg	7 284	576 249	12 641	950
Malta	1 043	434 403	2 401	650
Netherlands	100 870	16 979 120	5 941	11 200
Norway	61 934	5 213 985	11 878	3 740
Poland	61 170	37 967 209	1 611	14 000
Portugal	16 342	10 341 330	1 580	22 200
Romania	30 014	19 759 968	1 519	7 600
Serbia	1 945	7 076 372	275	8 000
Slovakia	12 418	5 426 252	2 288	1 650
Slovenia	4 339	2 064 188	2 102	1 350
Spain	131 177	46 438 422	2 825	53 800
Sweden	63 559	9 851 017	6 452	6 550
Switzerland	70 218	8 325 194	8 434	7 300
Turkey	30 221	78 741 053	384	50 000
United Kingdom	305 069	65 341 183	4 669	36 700
EUROPE - 32 - 2016	1 939 393	609 412 615	3 182	598 700

Source: Construction output and population data - Eurostat
Copyright © Eurostat. All Rights Reserved. Data for Serbia was sourced from Statistical Office of the Republic of Serbia. Data for Turkey derived from raw data from Turkstat. In both cases data has been converted to Euros using historical exchange rates as at mid year. Data for 2016 are Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices. The total for EUROPE-32 is Mirza & Nacey estimate.

Construction output includes civil engineering and infrastructure work.

2.2 THE ARCHITECTURAL MARKET IN EUROPE

The total value of the architectural market in the 27 surveyed countries is estimated to be €15.6 billion in 2016. This relates to the total 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). Grossing up this figure to reflect all

32 European countries, the total estimated value of the architectural market in Europe is €16.8 billion.

This year's Europe-32 figure is 12 per cent higher than in 2014, and is the highest figure recorded since 2008. Most countries have seen an increase between 2014 and 2016. The largest market is in

Germany (€5.0 billion) followed by the United Kingdom (€2.2 billion) and Italy (€1.8 billion). These have been the three largest markets in each of the previous surveys.

CHART 2-4
VALUE OF ARCHITECTURAL MARKET, AVERAGE PER ARCHITECT

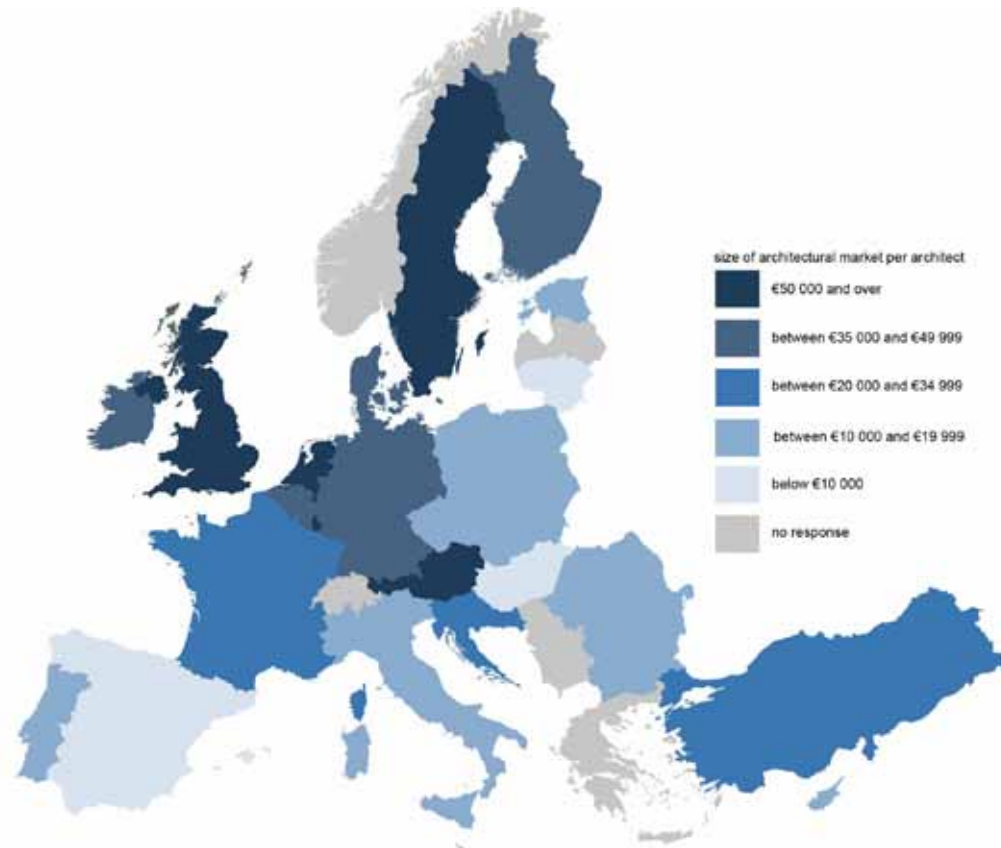
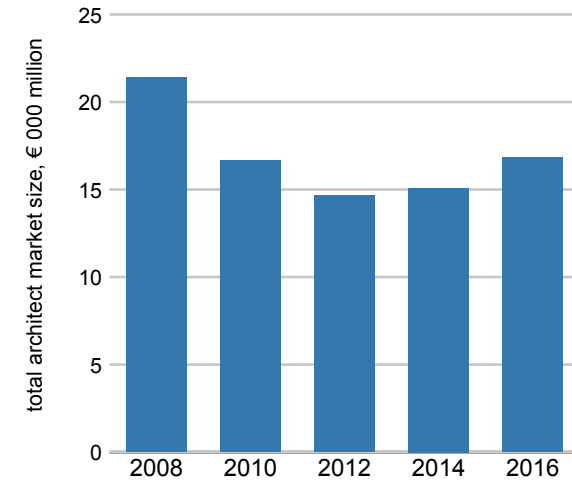


CHART 2-5
CHANGE IN ESTIMATED VALUE OF ARCHITECTURAL MARKET IN EUROPE-32, 2008-16



Base: all 32 European countries
Source: Mirza & Nacey estimates based on survey data

* Methodological Note: The base 'EUROPE-32' is different from the base used for previous surveys. Figures for 2008, 2010, 2012 and 2014 have been re-calculated using the 2016 base number of countries, so will be different from estimates published in previous survey reports.

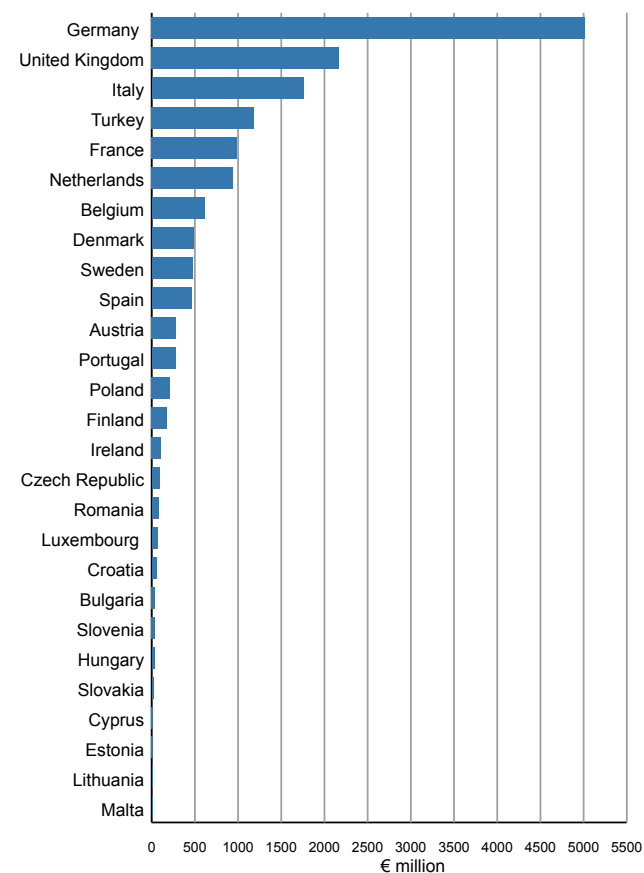
TABLE 2-3
ESTIMATED SIZE OF ARCHITECTURAL MARKET 2016, BY COUNTRY, AND COMPARATIVE VALUES

	market size (€000s)	value per architect (€)	value per 1000 population (€)	architectural market as per cent construction	2014 market size (€000s)	2012 market size (€000s)	2010 market size (€000s)	2008 market size (€000s)
Austria	279 307	53 713	32 103	0.6	281 241	262 774	256 292	296 789
Belgium	610 346	40 420	54 062	0.8	436 306	529 292	556 280	327 108
Bulgaria	36 905	18 452	5 159	0.5	20 358	26 792	46 116	n/a
Croatia	54 841	24 928	13 086	0.9	44 798	50 235	64 290	n/a
Cyprus *	17 859	18 799	21 053	0.9	n/a	n/a	n/a	n/a
Czech Republic *	92 210	11 110	8 737	0.4	139 458	153 433	73 045	n/a
Denmark	482 321	48 232	84 510	1.5	392 062	447 607	308 697	356 228
Estonia *	14 396	17 995	10 940	0.5	16 330	29 277	12 667	27 524
Finland	178 017	50 862	32 442	0.6	133 689	161 704	117 456	42 580
France	984 215	32 807	14 764	0.3	907 837	1 254 376	1 301 699	1 103 778
Germany	5 015 212	45 927	61 041	1.8	5 047 349	4 192 657	4 094 601	3 988 103
Hungary	33 267	7 921	3 384	0.4	n/a	60,566	n/a	n/a
Ireland	110 600	44 240	23 741	0.5	90 682	112 102	172 362	408 855
Italy	1 758 087	11 198	28 980	0.9	1 916 761	2 775 280	2 708 910	n/a
Lithuania	10 641	7 882	3 684	0.3	n/a	9,676	11,455	n/a
Luxembourg	68 308	71 903	118 538	0.9	49 361	38 264	n/a	31 828
Malta *	9 659	14 860	22 234	0.9	13 050	15 565	n/a	13 320
Netherlands	939 867	83 917	55 354	0.9	910 000	807 000	976 000	902 000
Poland	212 481	15 177	5 596	0.3	n/a	210,575	258,803	n/a
Portugal	276 051	12 435	26 694	1.7	176 636	261 110	n/a	n/a
Romania *	76 954	10 126	3 894	0.3	79 471	90 111	63 551	112 659
Slovakia	22 058	13 368	4 065	0.2	15 211	n/a	41 000	n/a
Slovenia	35 700	26 440	17 295	0.8	24 874	42 110	10 359	40 501
Spain	461 124	8 571	9 930	0.4	332 999	336 420	n/a	n/a
Sweden	470 484	71 830	47 760	0.7	347 110	330 785	356 300	145 073
Turkey	1 182 989	23 660	15 024	3.9	888 440	856 591	960 371	726 778
United Kingdom	2 169 202	59 106	33 198	0.7	1 978 835	2 006 403	1 955 929	2 800 042
2016 EUROPE-27	15 603 101	27 300	26 651	0.9				
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 revenue earned by private architectural practices in each country. Data refers to 2015/16. 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

Architects' work is weighted towards refurbishment; 59 per cent of work is refurbishment, compared with 41 per cent new build. There has been an increase in the proportion of new build work since the 2014 survey. Highest levels of new build are recorded by architects in Turkey and Poland, where new build has a 70 per cent share of work. More than 70 per cent of work in Italy is refurbishment.

Private housing dominates the market, and in particular one-off housing. This includes one-off houses, extensions and loft conversions. This sector alone accounts for 39 per cent of all work; other private housing (multiple houses, flats, housing developments) is a further 16 per cent of work so private housing overall represents 55 per cent of all work undertaken by Europe's architects. Private housing has consistently been the largest single work sector in all five surveys; up to 2010 private housing accounted for about 45 per cent of work; since 2012, the proportion has grown to over 50 per cent.

Offices and retail work each account for 7 per cent of total work; the overall share of private non-housing and commercial work totals 32 per cent. Eight per cent of work is public sector, plus another 7 per cent from health and education. The highest share of private housing work is undertaken by architects in Belgium and the UK (over 60 per cent); architects in Hungary and Poland have the highest proportion of commercial and other private work. The public sector accounts for 40 per cent or more of work in Finland and Denmark.

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

per cent	new build	refurbishment
Austria	54	46
Belgium	46	54
Bulgaria	56	44
Croatia	54	46
Cyprus *	62	38
Czech Republic *	43	57
Denmark	49	51
Estonia *	56	44
Finland	55	45
France	45	55
Germany	46	54
Hungary	52	48
Ireland	42	58
Italy	21	79
Lithuania	59	42
Luxembourg	56	44
Malta *	54	46
Netherlands	47	53
Poland	70	30
Portugal	38	62
Romania *	66	34
Slovakia	59	41
Slovenia	53	47
Spain	35	65
Sweden	55	45
Turkey	70	30
United Kingdom	39	61
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	55	87
offices	7	33
retail	7	23
leisure and the arts	4	15
industrial	5	22
health	3	10
education	4	17
public housing	2	9
other private	9	31
other public	6	14

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

CHART 2-7
PROPORTION OF MARKET BY BUILDING SECTOR

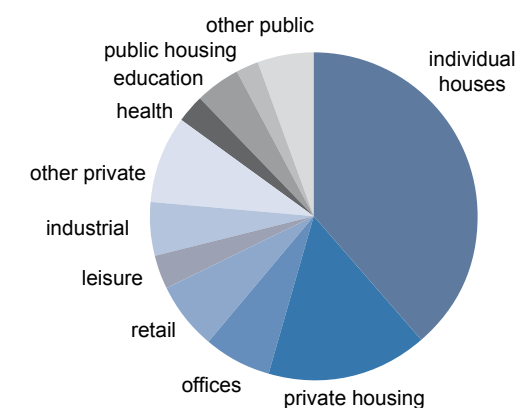
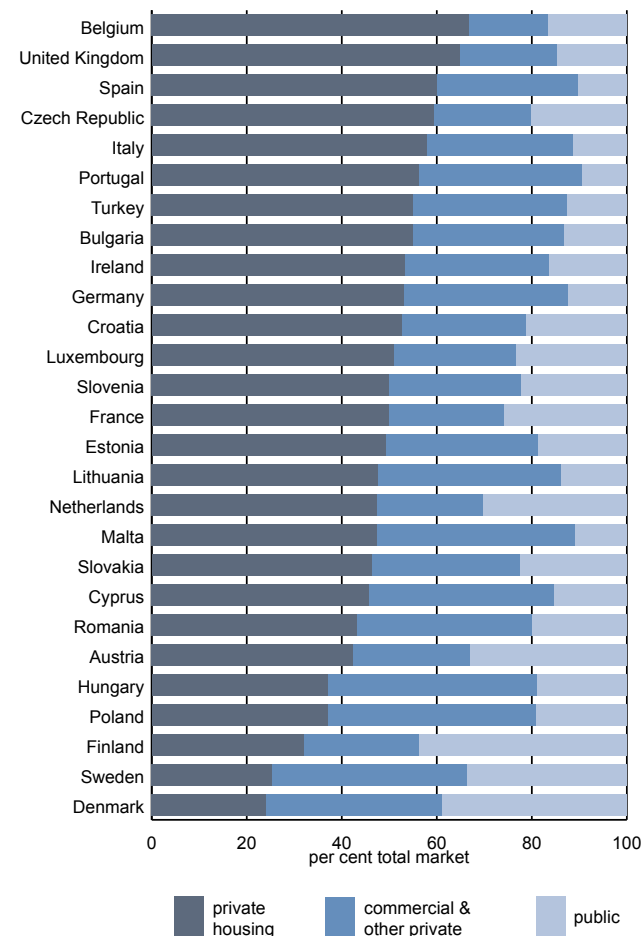


TABLE 2-6
PROPORTION OF WORK UNDERTAKEN BY BUILDING SECTOR, ANALYSED BY COUNTRY

per cent	individual houses, extensions, loft conversions	private housing	offices	retail	leisure	industrial	health	education	public housing	other private	other public	TOTAL
Austria	30	13	7	4	3	5	5	7	13	5	8	100
Belgium	54	13	4	4	1	5	3	4	5	3	4	100
Bulgaria	37	18	5	7	2	13	1	2	4	4	6	100
Croatia	36	17	5	2	5	5	2	6	1	10	13	100
Cyprus *	42	4	4	1	8	7	3	6	0	19	7	100
Czech Republic *	49	10	5	2	3	7	6	3	1	4	10	100
Denmark	16	8	14	3	7	4	7	12	7	8	12	100
Estonia *	40	9	7	2	6	10	0	8	1	7	10	100
Finland	20	12	7	4	4	2	8	9	11	7	16	100
France	36	14	7	5	4	4	5	6	6	5	9	100
Germany	32	21	10	3	5	7	3	7	2	9	0	100
Hungary	26	11	6	6	8	16	1	7	0	8	11	100
Ireland	46	8	7	8	4	3	6	7	1	8	3	100
Italy	42	16	5	8	2	4	1	2	1	12	8	100
Lithuania	35	12	10	4	4	9	2	2	2	11	8	100
Luxembourg	37	14	11	4	2	3	2	9	5	7	8	100
Malta *	38	10	26	8	0	2	0	1	0	5	10	100
Netherlands	38	10	3	3	4	6	5	8	6	7	12	100
Poland	15	22	10	5	3	13	7	3	3	13	6	100
Portugal	45	11	4	12	5	6	2	3	1	7	4	100
Romania *	32	11	12	9	3	10	6	6	3	4	5	100
Slovakia	37	10	10	5	4	6	3	4	8	5	7	100
Slovenia	44	6	16	2	3	4	3	8	1	3	10	100
Spain	46	14	5	12	2	2	2	3	1	9	5	100
Sweden	15	10	13	6	7	4	4	9	8	11	13	100
Turkey	37	18	7	11	3	6	2	3	2	5	6	100
United Kingdom	52	13	4	4	5	2	4	6	2	5	3	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

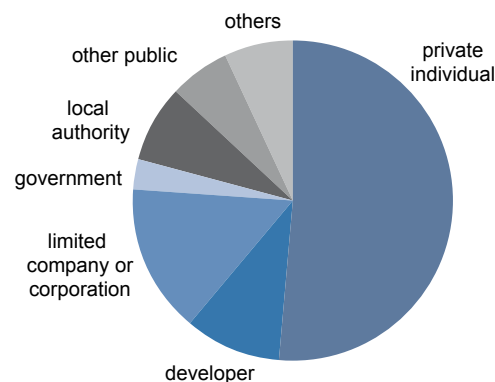


TABLE 2-7
MARKET SHARE AND INVOLVEMENT
BY CLIENT TYPE

per cent	per cent of market	per cent of practices involved
individuals	52	87
developer	10	33
limited company / PLC	15	23
central government	3	15
local government	8	22
other public	6	10
other private	7	17

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	44	10	16	14	8	3	6	100
Belgium	62	13	6	2	7	7	3	100
Bulgaria	42	19	16	2	11	5	5	100
Croatia	46	1	27	2	17	4	2	100
Cyprus *	56	20	9	2	4	8	1	100
Czech Republic*	64	3	8	2	8	12	3	100
Denmark	25	10	16	11	18	11	10	100
Estonia *	53	10	7	4	21	2	4	100
Finland	23	16	17	5	16	20	3	100
France	45	10	10	1	11	12	9	100
Germany	52	8	16	4	11	0	8	100
Hungary	36	10	20	2	16	7	1	100
Ireland	52	11	15	5	4	6	7	100
Italy	59	8	13	1	5	6	8	100
Lithuania	52	11	19	4	7	3	5	100
Luxembourg	46	20	5	9	9	8	4	100
Malta *	39	30	19	6	0	6	0	100
Netherlands	46	15	4	3	8	11	13	100
Poland	16	29	29	1	18	6	1	100
Portugal	50	14	19	1	5	4	6	100
Romania *	50	13	17	4	8	5	3	100
Slovakia	45	18	17	3	11	2	4	100
Slovenia	57	4	17	7	9	4	1	100
Spain	64	7	12	1	7	4	5	100
Sweden	17	15	29	9	13	13	4	100
Turkey	41	13	27	4	3	5	5	100
United Kingdom	50	17	11	3	3	11	6	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

2.5 THE ARCHITECTURAL MARKET ANALYSED BY TYPE OF SERVICE

Building design dominates the list of services offered, accounting for 62 per cent of work undertaken by architects in Europe. This is a higher proportion than in the last two surveys. In Belgium, Poland, Austria, Luxembourg and the Czech Republic, more than 70 per cent of architects' work is building design.

Only one other service offered is significant; interior design, which accounts for 11 per cent of work. Interior design accounts for a higher proportion of work in Italy (19 per cent) than in any other country. Other services account for 27 per cent of work; project management represents 10 per cent or more of work in Malta and Denmark; planning in Romania and Sweden; while certification is a major source of work in Hungary and property valuation in Malta.

CHART 2-10
PROPORTION OF MARKET BY TYPE OF SERVICE

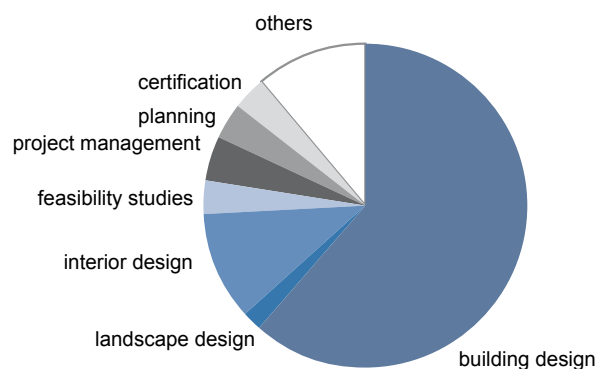


TABLE 2-9
PROPORTION OF WORK UNDERTAKEN BY EACH SERVICE TYPE

per cent	building design	landscape design	interior design	feasibility studies	project management	planning	certification	property valuation	other service	TOTAL
Austria	73	1	6	5	3	2	4	1	5	100
Belgium	75	1	7	4	5	2	1	1	6	100
Bulgaria	70	1	9	5	4	6	0	1	3	100
Croatia	59	4	10	0	5	9	6	1	6	100
Cyprus *	52	2	11	3	4	2	10	1	14	100
Czech Republic *	71	8	8	0	7	1	0	0	5	100
Denmark	47	5	8	2	10	8	3	2	15	100
Estonia *	82	1	3	1	1	6	2	0	3	100
Finland	67	2	6	3	3	9	0	0	8	100
France	70	1	8	8	5	2	0	0	6	100
Germany	86	1	4	0	1	2	2	1	4	100
Hungary	49	1	3	1	6	3	22	2	14	100
Ireland	67	3	6	5	6	1	4	0	9	100
Italy	41	3	19	4	6	3	5	5	14	100
Lithuania	57	5	15	2	8	6	0	0	5	100
Luxembourg	71	1	5	5	7	7	1	1	3	100
Malta *	45	2	7	1	15	0	3	17	10	100
Netherlands	60	2	12	6	6	3	0	0	10	100
Poland	74	0	8	1	2	9	0	0	4	100
Portugal	53	1	14	4	6	7	5	2	7	100
Romania *	66	1	6	7	4	12	0	0	4	100
Slovakia	59	6	14	3	6	8	0	0	4	100
Slovenia	56	3	13	10	9	6	1	0	2	100
Spain	59	1	5	2	3	4	9	4	13	100
Sweden	67	2	8	5	4	10	1	0	4	100
Turkey	63	3	14	2	8	3	1	1	6	100
United Kingdom	69	2	6	8	2	3	2	0	8	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

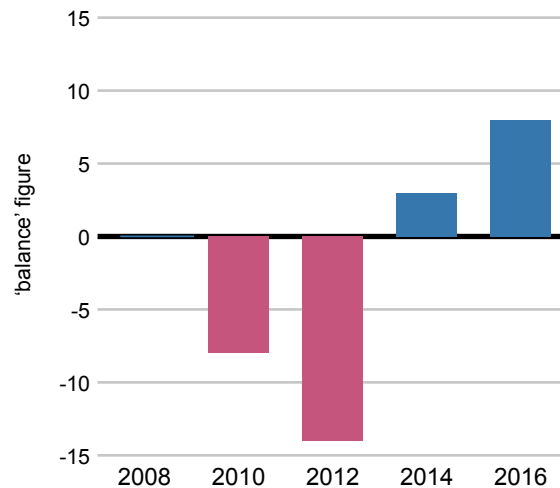
The mood amongst architects is distinctly more positive than it has been in any of the previous surveys. The 'balance' figure of +8 represents the difference between the proportion of architects who expect an increase in their workloads and the proportion who expect workloads to fall. The relatively modest balance figure - albeit the highest since the survey began in 2008 - disguises the fact that

18 out of 27 countries record positive 'balance' figures of +15 or more. Furthermore, only two countries record a negative 'balance' figure this year.

Those two negative countries are Italy ('balance' figure of -13) and the UK (-5). The negative prospects for the UK probably

reflect uncertainty in the lead up to Brexit. Neighbouring Ireland, by contrast, reports the highest positive 'balance' figure, of +59. Ireland's balance figure is well ahead of that in any other country; the next highest balance figures are in the mid thirties, reported by architects in Malta, Romania and Slovakia, followed by a balance of around +30 in Sweden and the Netherlands.

CHART 2-11
CHANGE IN WORKLOAD PREDICTIONS
(BALANCE FIGURE).
ALL SURVEY COUNTRIES, 2008-16 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 2017

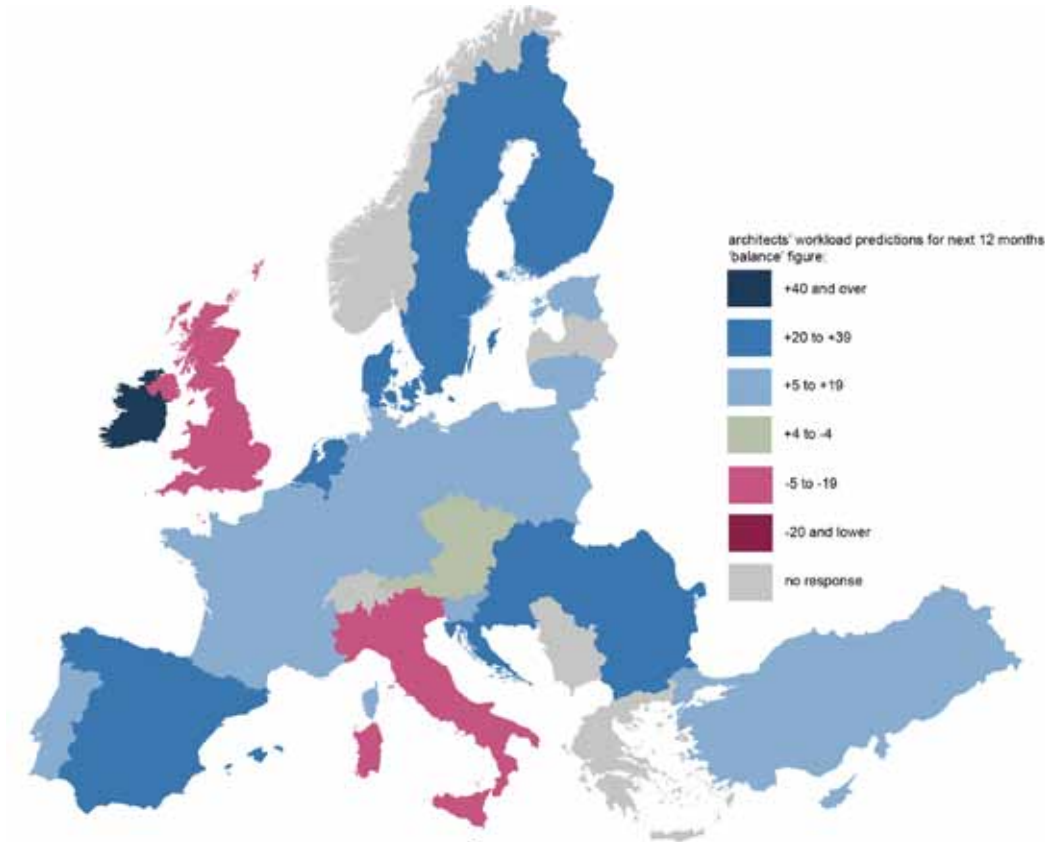




TABLE 2-10
FUTURE WORKLOAD PROSPECTS FOR 2017, ANALYSED BY COUNTRY

per cent	per cent of Principals who expect their practice workloads to change over the coming 12 months			balance**
	up	no change	down	
Austria	26	49	25	+1
Belgium	30	52	18	+12
Bulgaria	35	51	14	+22
Croatia	37	50	13	+23
Cyprus *	24	59	18	+6
Czech Republic *	19	63	19	0
Denmark	38	49	13	+24
Estonia *	35	39	26	+9
Finland	36	55	10	+26
France	34	43	23	+10
Germany	32	51	16	+16
Hungary	43	43	14	+29
Ireland	65	28	7	+59
Italy	20	46	33	-13
Lithuania	29	58	13	+16
Luxembourg	27	61	12	+16
Malta *	36	64	0	+36
Netherlands	41	48	11	+30
Poland	25	68	7	+18
Portugal	38	41	21	+16
Romania *	46	42	12	+35
Slovakia	42	51	7	+35
Slovenia	36	43	21	+14
Spain	39	46	15	+23
Sweden	42	48	10	+32
Turkey	41	32	27	+15
United Kingdom	27	41	32	-5
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

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

CHART 2-13
FUTURE WORKLOAD PROSPECTS FOR 2017, ANALYSED BY SIZE OF PRACTICE

