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COVID-19: European overview - ACE Survey#2

May 2020



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About the survey

In May, the Architects' Council of Europe conducted a second survey to understand how its members are dealing with the COVID-19 crisis, as well as the first impacts on the profession.

The second survey, conducted from 12/05 to 20/05 received responses from **20 countries of Europe**. Read the results below.



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Actions taken by ACE Member Organisations



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Information, guidelines, advice to architectural offices

- Information on State financial support available for architects (95%)
- Legal advice regarding the running of architectural offices and businesses (85%)
- Economic advice to keep business afloat (70%)
- Post-Covid 19 advice on strength, creativity and new ways of working (50%)

Other initiatives:

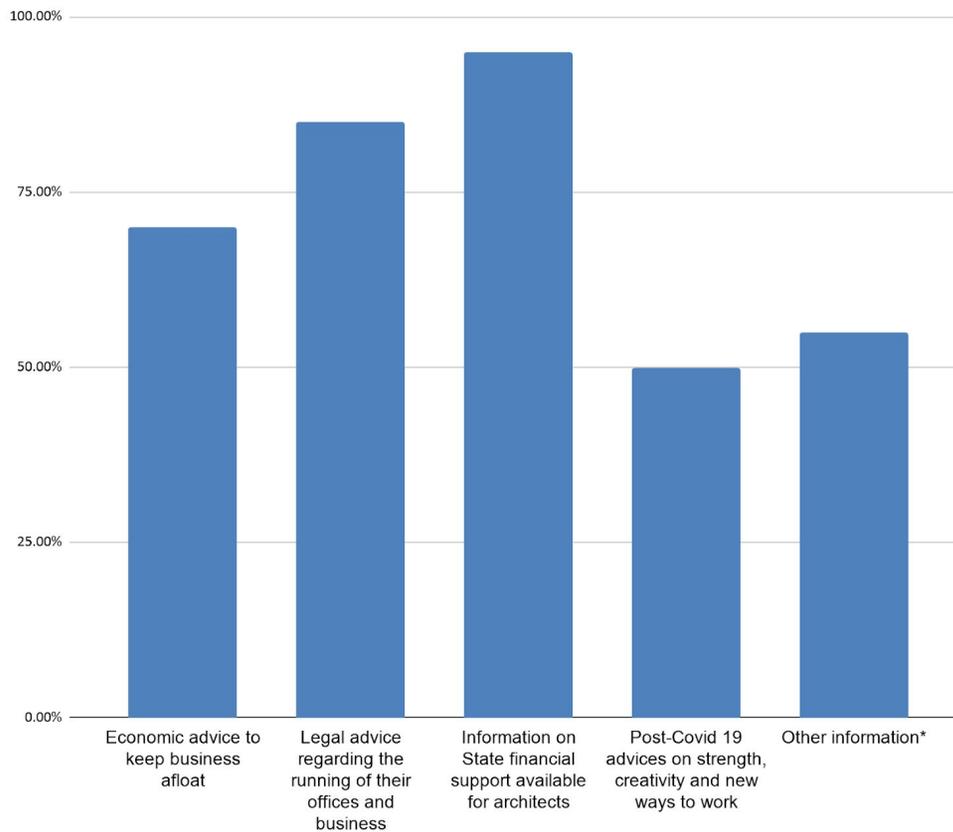
- Contributions to enhance the legal framework for digitisation of architectural services - *Romania*
- Information covering architects' regulatory responsibilities at this time - *The UK*
- Practical tips on how to work remotely productively - *The Netherlands*
- Launching the Slovak Chamber of Architects' 2020 Prize for Architecture CE ZA AR despite the limitations and restrictions during the pandemic - *Slovakia*

Information and Advocacy towards governments

- Measures to support SMEs and self-employed professionals (80%)
- Post crisis proposals (65%)
- Suitable protocols for working environments (40%)



Information, guidelines, advices to architectural offices



Economic advice to keep business afloat **70%**

Legal advice regarding the running of their offices and businesses **85%**

Information on state financial support available for architects **95%**

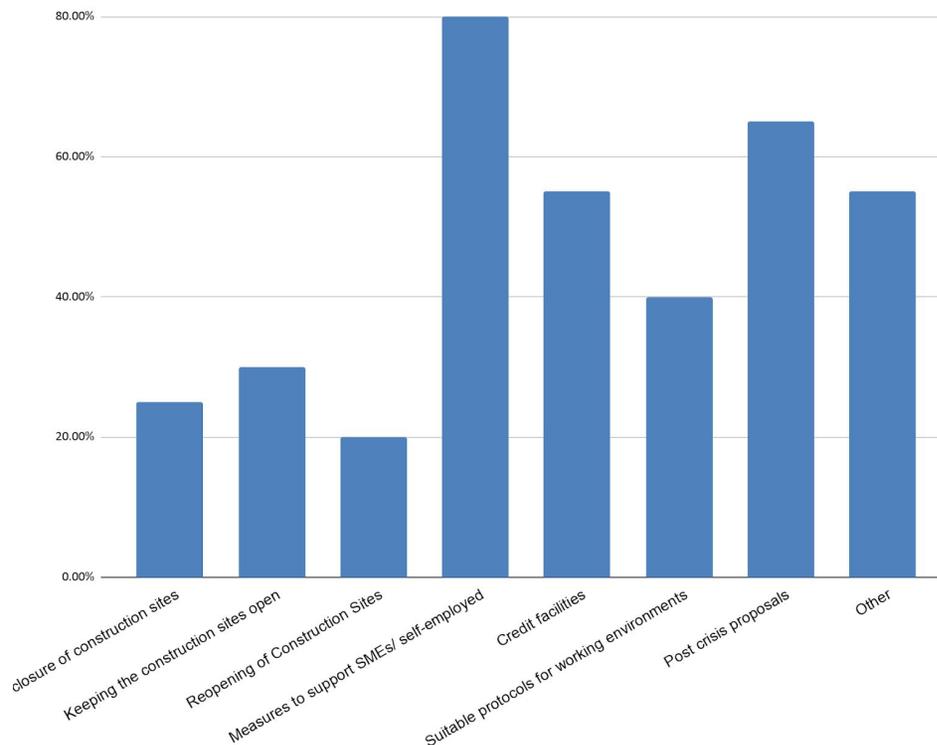
Post-Covid 19 advice on strength, creativity and new ways of working **50%**

Other information* **55%**

Contributions to enhance the legal framework for digitisation of architectural services, information covering architects' regulatory responsibilities, launch of the Slovak Chamber of Architects 2020 Prize for Architecture, CPD, information on market developments and impact of Covid-19, How to lead and manage a team during lockdown, home working and new tech, meeting CPD requirements during lockdown, cash flow and business management, marketing and looking for new work, the economy and future architects' market home-office recommendations, questionnaires & surveys, new safety measures relating to the construction sites, providing the governmental information.



Information and Advocacy towards governments



Temporary closure of construction sites **25%**

Keeping the construction open **30%**

Reopening of Construction sites **20%**

Measures to support SMEs/ self-employed professionals **80%**

Credit facilities **55%**

Suitable protocols for working environments **40%**

Post crisis proposals **65%**

Others **55%**

**Other information:*

Lowering VAT, keeping stimulation and quickening formal procedures of issuing building permits, launching more architectural design competitions and state construction investment programs, adjustment of government support measures to better fit the needs of members.

Measures to support employees, tax payment deferral schemes, planning system updates.



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Impact on the Architectural Sector



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Impact on the Architectural sector:

Public work – Architects mainly report:

- Projects continue but at a slower pace (90% of respondents)
- Investment decisions are postponed (75% of respondents)
- Delays in the approval process due to an understaffed public administration (70% of respondents)
- Clients are cancelling or suspending projects (50% of respondents)

Private work – Architects mainly report:

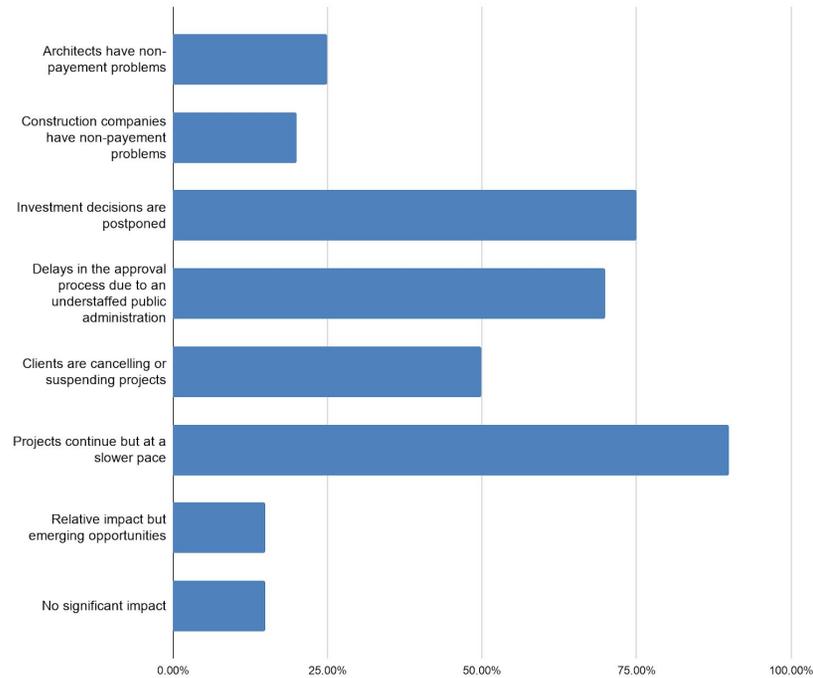
- Non or late payment problems (65%)
- Investment decisions are postponed (90%)
- Projects continue but at a slower pace (90% of respondents)

Architectural Design Competitions:

- New ADCs continue to be launched in most responding countries (76.5%)



SITUATION IN THE PUBLIC SECTOR

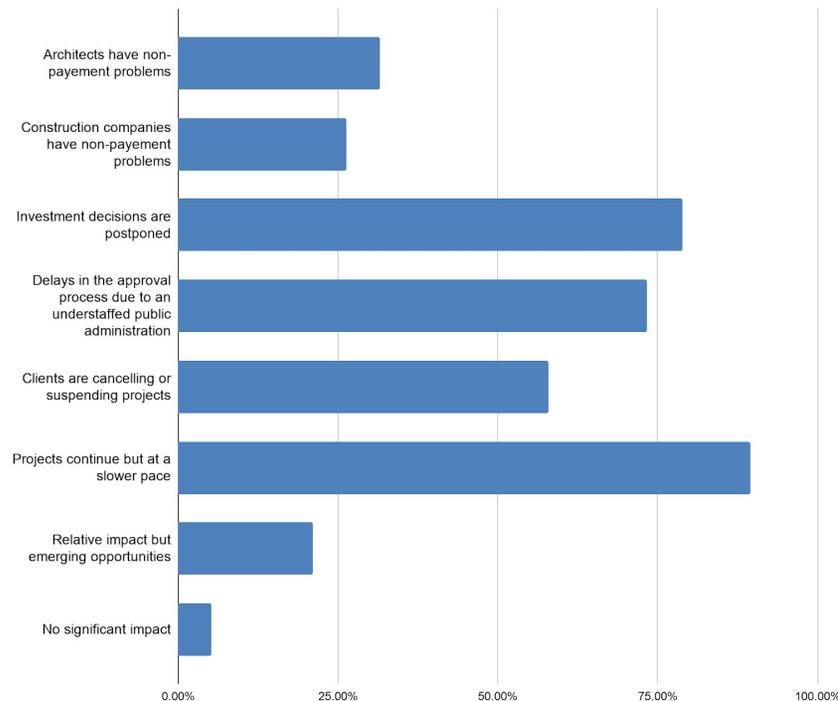


Public sector – Architects mainly report:

Architects have non-payment problems **25%**
Construction companies have non-payment problems **20%**
Investment decisions are postponed **75%**
Delays in the approval process due to an understaffed public administration **70%**
Clients are cancelling or suspending projects **50%**
Projects continue but at a slower pace **90%**
Relative impact but emerging opportunities **15%**
No significant impact **15%**



SITUATION IN THE SEMI- PUBLIC SECTOR



Semi-Public sector – Architects mainly report:

Architects have non-payment problems **31,6%**

Construction companies have non-payment problems **26,3%**

Investment decisions are postponed **78,9%**

Delays in the approval process due to an understaffed public administration **73,7%**

Clients are cancelling or suspending projects **57,9%**

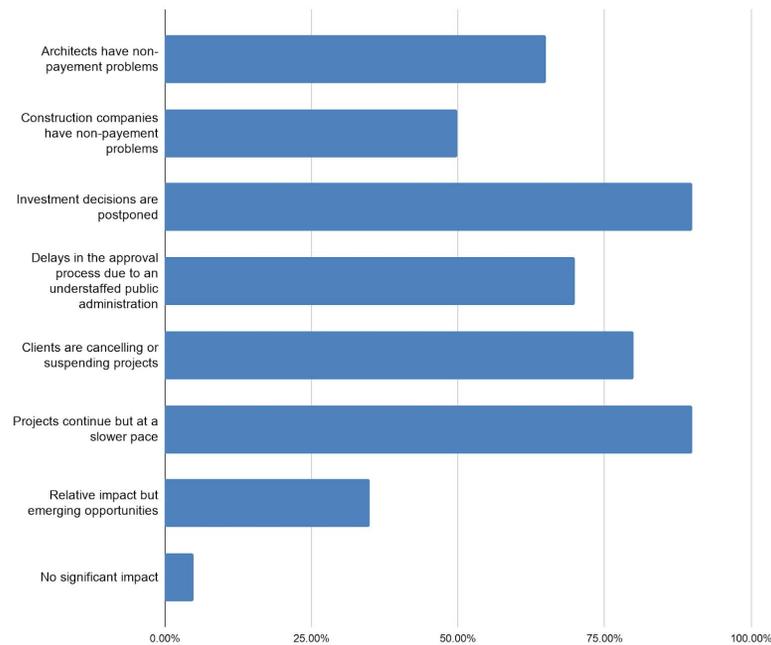
Projects continue but at a slower pace **89,5%**

Relative impact but emerging opportunities **21,1%**

No significant impact **5,3%**



SITUATION IN THE PRIVATE SECTOR



Private sector – Architects mainly report

Architects have non-payment problems **65%**

Construction companies have non-payment problems **50%**

Investment decisions are postponed **90%**

Delays in the approval process due to an understaffed public administration **70%**

Clients are cancelling or suspending projects **80%**

Projects continue but at a slower pace **90%**

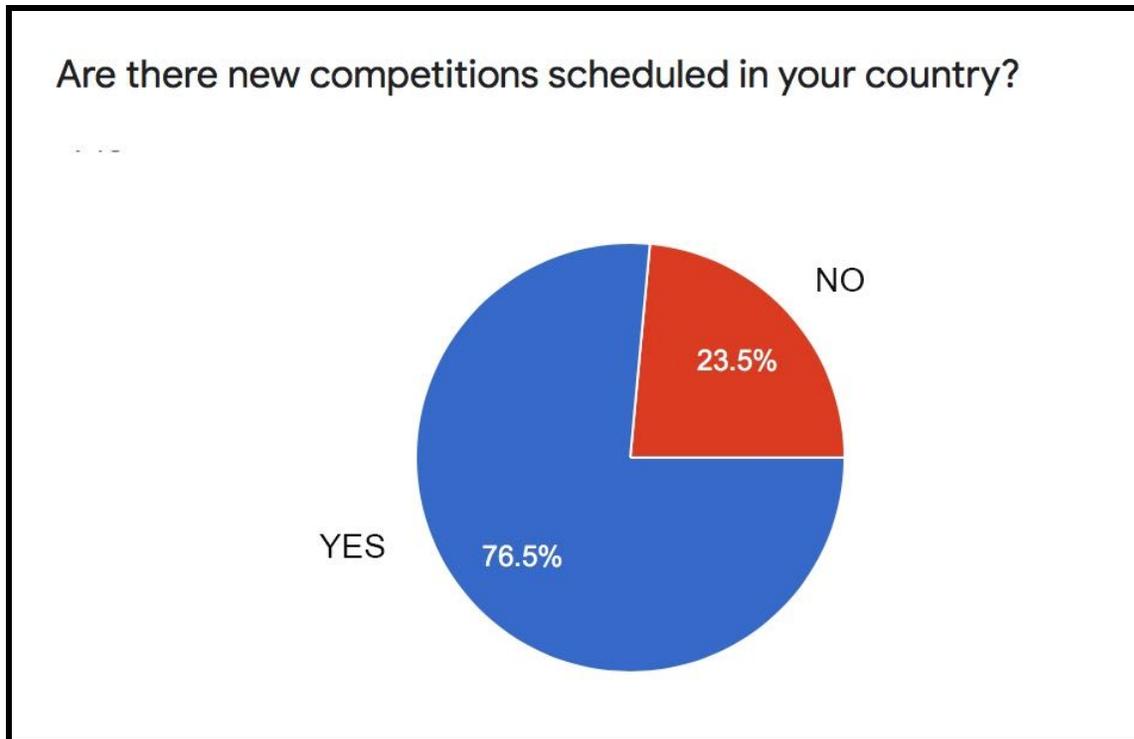
Relative impact but emerging opportunities **35%**

No significant impact **5%**



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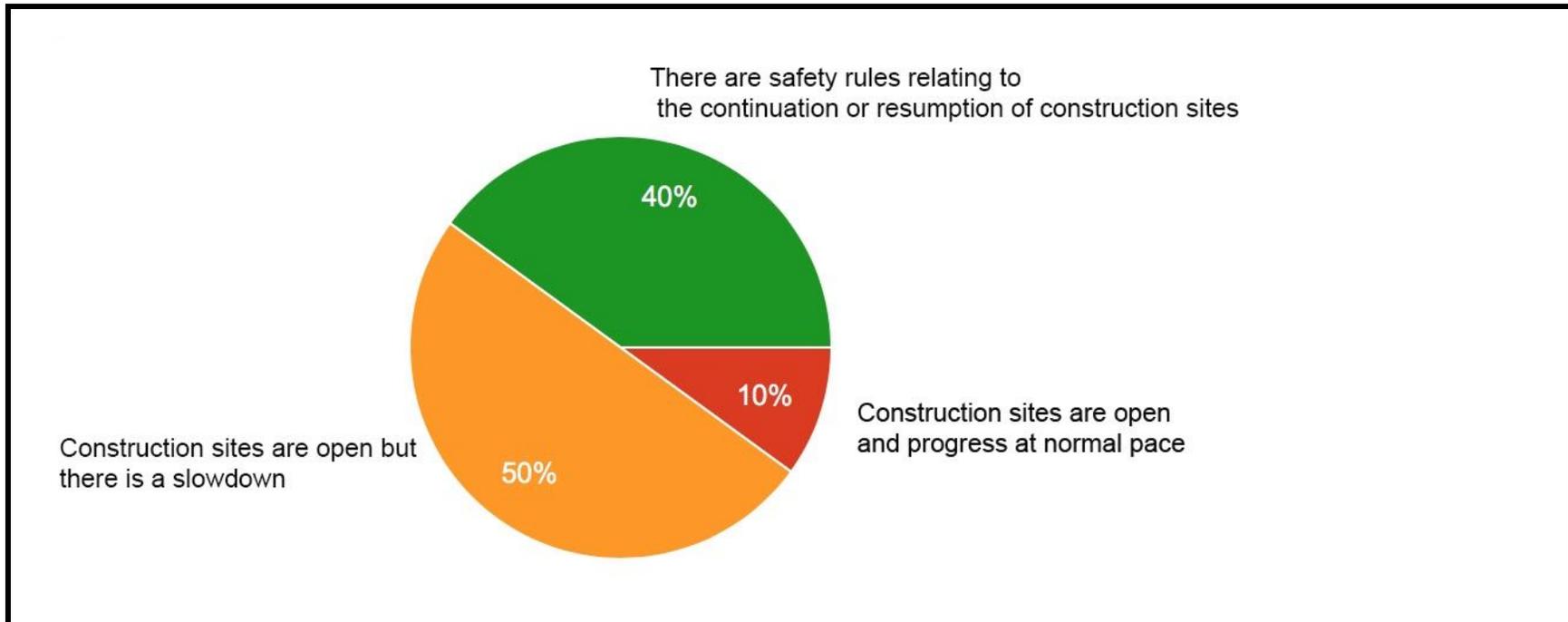
Architectural Design Competitions



= New Architectural Design Competitions (ADCs) continue to be launched in most responding countries (76.5%)



Situation on construction sites

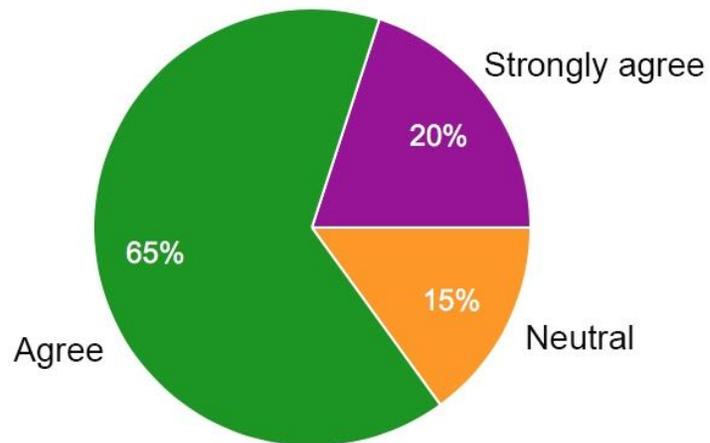


= Construction sites in most countries have been temporarily closed or have experienced slowdown, due to problems with the delivery of materials and new health and safety measures introduced to protect workers



Impact on the architectural sector

Do you think that the COVID-19 pandemic will lead to a recession in the architectural sector?

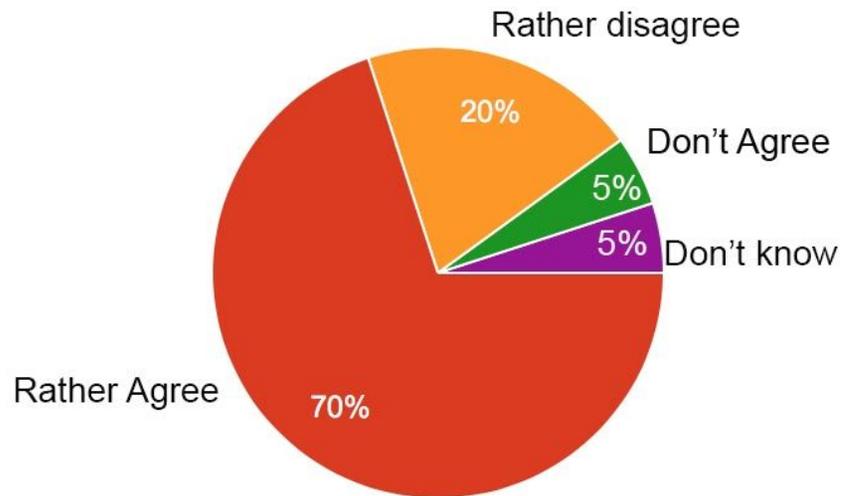


= More than 80% of respondents think that the pandemic will lead to a recession in the architectural sector.



State support to the sector

The measures announced by the government in your country to support in SMFs and self-employed are appropriate:



= 70% of respondents estimate that their government provides appropriate support to SMEs and self-employed.



Desired additional measures, at national and EU levels:

- Greater public investments in the construction sector, with special focus on the renovation of the EU building stock;
- Better public procurement, favouring green investments and promoting circular and local economy;
- Promotion of ADCs and architectural policies, to achieve greater quality in the built environment;
- Simplification and higher efficiency of administrative procedures;
- Faster release and extension beyond the end of May of subsidies to SMEs and self-employed;
- Compensation for turnover loss;
- Better solutions to guarantee a strong kick-start of the construction value chain after the pandemic period.



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Prospective



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Several ACE member organisations launched 'think tanks' to reflect on how the pandemic will affect the way we design buildings and plan cities, taking into account new parameters:

- Social distancing in public spaces and at work
- Home becoming the new working place: review the production and design of housing, which is a multifunctional place of use
- Lightweight adaptable architecture
- More home-working > less commuting
- Greater use of public transport and active mobility
- Rethinking offices/ working environments
- Rethink cities in the light of health crises, industrial risks and climate change, particularly heatwaves.
- Accelerate the ecological transition as a driving force for economic recovery



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- Putting well-being back at the centre of economic development issues;
- Creating a better awareness of the respect for a natural balance
- Planning for affordable housing, energy-efficient renovation and school construction shall continue and programmes for implementing the European Green Deal for more climate protection in urban and rural areas should not falter.
- “Nothing should go back to "normal". Normal wasn't working. If we go back to the way things were, we will not have learnt any lessons”.



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Highlights and links

Actions or initiatives that the organisations have taken in relation to the COVID-19 pandemic.



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Romania	<p>Webinars on economic and social measures undertaken by government;</p> <p>Webinars on psychology (pressure mitigation, depression prevention, customer psychology etc.); webinar on funding opportunities; in preparation: webinar on crisis management.</p>
UK ARB RIBA	<p>A dedicated website page which provides information for key audiences, e.g., architects, schools of architecture, students, etc - http://www.arb.org.uk/coronavirus/. Although the organisation is operating remotely, we are open and we are responding to calls as usual. We are in regular dialogue with key stakeholders to ensure we fully understand the situation and to inform the development of the information we are issuing.</p> <p>https://www.architecture.com/knowledge-and-resources/knowledge-landing-page/coronavirus-covid-19-advice</p> <p>https://www.architecture.com/knowledge-and-resources/knowledge-landing-page/coronavirus-covid-19-advice/digest</p>
The Netherlands	<p>Please check the www.bna.nl/nieuws tag 'corona'</p>



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Malta	<p>The KTP has kept its members updated on a regular basis and conducted surveys periodically; see our last circular https://kamratalperiti.org/cir-13-20-covid-19-pandemic-site-inspections-and-site-operating-procedures-update-6</p>
France	<p>A free "covid-19" training kit for all architects</p> <ul style="list-style-type: none">- Guide to recommendations for a safe resumption of construction sites,- FAQs,- Proposals for a recovery plan,- Pandemic Special Feature,- Support tool for assessing the resumption of work and drawing up the Memorandum of Understanding between the parties,- Model memorandum of understanding for the resumption of construction work,- Logbook Covid 19, <p>All these elements can be found on the CNOA website www.architectes.org</p>
Slovenia	<p>Website with legal advices and informations about state legal measures, links to the adopted laws: http://www.zaps.si/index.php?m_id=covid_poslovanje http://www.zaps.si/index.php?m_id=covid_predpisi http://www.zaps.si/index.php?m_id=covid_prostorski_akti</p>
Slovakia	<p>Webinar on dealing with the impacts of the pandemic on the profession with legal consultancy and advice https://www.komarch.sk/webinar-ako-spravne-na-covid</p>



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<p>Sweden</p> <p>Swedish arkitekt</p> <p>Federation of Swedish Innovation Companies</p>	<p>Legal advice - to employees, students and offices. Analysis of the market Communication - new on the website every day (and other social media) Lobbying towards the Government - CPD - special support för redundant members. https://www.arkitekt.se/coronakrisen-det-har-gor-sveriges-arkitekter-for-att-hjalpa-dig/</p> <p>We have performed 3 surveys and reports on the impact on the market. 4th is on the way. We have held several webinars with information on furloughing rules, governmental support and other measures relevant to the employer situation.</p>
<p>Italy</p>	<p>www.architettiperilfuturo.it A new electronic platform to detect and share proposals, policy actions, general discussion between the architect's community and italian society. In May, June, July, there is scheduled a marathon (24h of discussion among government, scientist community, associations, people and, of course, architects), 6 forums on topics (built environment, nature and climate changes, new urban design and planning tools, innovative Public Procurement, digitalization and mobility, new urban finance tools).</p>



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Denmark	Website, newsletters, hotline (normal), Teams-meetings with large numbers of companies, Video transmitted General Assembly meeting including reports and information (no member participants except president, members were allowed to come but asked to stay away, they Q+A were used on video facility) Interviews in newspapers.
Switzerland	Information on the website (www.sia.ch/coronavirus), e-mail hotline www.sia.ch/coronavirus/information/beratung and letter proposal to the regional administrations (sent to all regional sections), education as webinars.
Germany	The BAK has carried out a survey on the consequences of COVID among 9.000 members that will be followed up by two additional questionnaires in July and September. -The BAK has initiated an Online Live Talk with BAK president Barbara Ettinger-Brinckmann and the state secretary for building issues Anne Katrin Bohle moderated by BAK Secretary General Tillman Prinz on the impact of the COVID 19 crisis. -Recording of the Live Talk: https://www.dabonline.de/live-talks/bak/ -The BAK has initiated three Online webinars with the federal subsidies bank (KfW) to inform about subsidized loans for architects.



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Portugal	<p>https://www.arquitectos.pt/?no=2020497222.154</p> <p>The Portuguese Association of Architects, the Portuguese Association of Landscape Architects, the Portuguese Association of Geographers, the Portuguese Association of Urban Planners and the Portuguese Association of Engineers, meeting on 22 April, signed the document entitled “Professional Associations and the Post-Covid Territory”, Which contribute to the necessary social and economic reform that the country requires. This document was sent to the Prime Minister, to the Minister for the Environment and Climate Action and to the President of the National Association of Portuguese Municipalities and can be downloaded from the pdf available below https://www.arquitectos.pt/documentos/1588268701D2sYH3ok9Ej75PM0.pdf</p> <p>https://www.arquitectos.pt/?no=2020497224.155</p>
Hungary	Questionnaire & surveys www.mek.hu
Cyprus	<p>During lockdown Cyprus Architects Association (CAA) successfully held the following webinars: “COVID-19 and Construction Contracts”, Antis Christoforidis, https://architecture.org.cy/diadykyaka-seminaria-sak-%e2%88%99-cao-webinar-series/ "COVID-19 and H&S on building sites", Dr Floros Pantelis, https://architecture.org.cy/diadykyaka-seminaria-sak-%e2%88%99-cao-webinar-series-%e2%88%99-02 Furthermore, CAA provided a "Guide for the electronic submission of urban/ building permits" which was acquainted to all relevant authorities, in order to find a common ground for its implementation.</p>



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Belgium	<p>We (CNOA) emphasized the importance of homework. (at the peak of the crisis 90% of personnel were working at home). We provided personnel and representatives with tips & tricks on how to deal with the crisis: how to create the perfect working spot at home/tips for home workers. We (CNOA) installed Microsoft Teams on all computers (personel) for online communications (1-to-1, team meetings...) Our yearly trainee event went online, with a Q&A and video calls. We implemented a more flexible judgement of the traineeship (obligate in Belgium). We (CNOA) did a joint communication with professional associations to all flemish architects. We (CNOA) kept the website up to date on a daily base and kept the architects informed directly by mailings.</p>
Spain	<p>We have drawn up a set of proposals to reactivate the construction sector, supporting the country's economic recovery.</p> <p>https://www.cscae.com/index.php/conoce-cscae/area-presidencia/6230-los-arquitectos-proponen-una-recuperacion-economica-que-se-apoye-en-la-edificacion-para-promover-el-acceso-a-la-vivienda-asequible-y-la-renovacion-urbana</p> <p>http://www.cscae.com/images/stories/Noticias/Presidencia/PROPUESTAS_PARA_LA_REACTIVACION_DEL_SECTOR_DE_LA_CONSTRUCCION_-_CSCAE_v84_.pdf</p>
Bulgaria	<p>None up to now. Vladimir Milkov suggest to call on the Government for implementing certain amendments in Public Procurement Law, diminishing the administrative burden and giving bigger chances to SME for awarding a PP is waiting for the decision of the Executive Board.</p>