

FACTS ABOUT DANISH ASSOCIATION OF ARCHITECTURAL FIRMS

Danish Association of Architectural Firms (DANSKE ARK) has more than 730 members¹ in Denmark. In total the firms employ around 4,300 graduate architects, constructing architects and other technical and administrative employees. DANSKE ARK comprises most private Danish architectural companies. The size of the member firms ranges from one man firms to Denmark's largest architectural firms with more than 200 employees in Denmark and abroad.

The member firms had in 2010 a total turnover² of 397 million Euro. This is an increase of 1,4 pct. from 2009.

The Danish architects experienced in 2010 an increase in foreign projects. From 2009 to 2010 the foreign turnover³ increased by almost 12 per cent to 62 million Euro. In 2010 16 per cent of the total turnover derives from projects abroad. Of the foreign turnover of 62 million Euro, exports accounts for 70 per cent with the rest is coming from foreign subsidiaries, project offices and partners.

Table 1

From 2009 to 2010 the total turnover increased by 1,4 per cent.

Turnover in the architectural profession

EUR million	2008	2009	2010
Total turnover	450	392	397
Foreign turnover	63	55	62
- Foreign turnover as share of total (pct.)	14,0	14,0	16,0

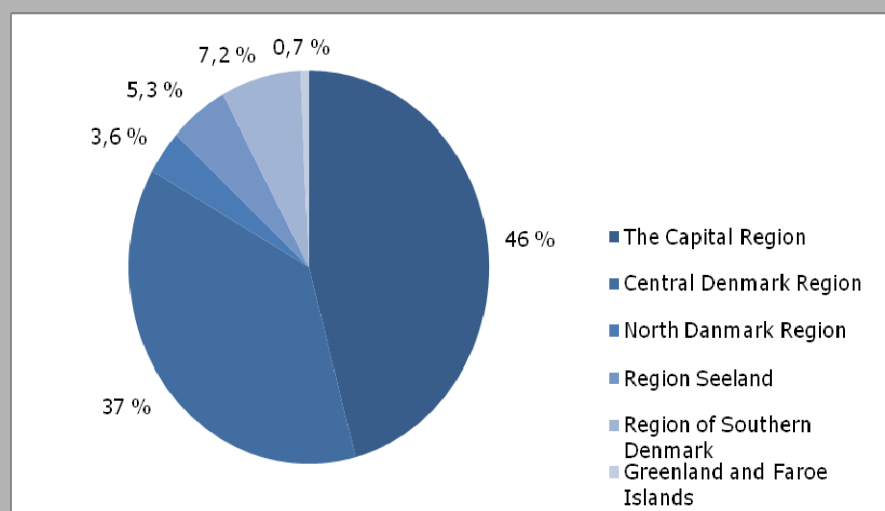
Note: The turnover is corrected for amounts charged and forwarded to sub-consultants in a full-service consultancy.

Source: DANSKE ARK, Membership Database and Export Analysis 2011

Chart1

Architectural firms in The Capital Region and The Central Denmark Region make up almost 83 per cent of the total turnover in the architectural profession.

Turnover by region in the architectural profession



Note: The turnover is corrected for amounts charged and forwarded to sub-consultants in a full-service consultancy.

Source: DANSKE ARK, Membership Database

¹ As of in January 2010.

² The turnover is corrected for amounts charged and forwarded to sub-consultants in a full-service consultancy.

³ The foreign turnover is calculated as the part of the total turnover resulting from exports and from foreign subsidiaries, project offices and partners.

Chart 2

Scandinavia is by far the largest market for exports of Danish architecture and accounts for approx 59 per cent of the total foreign market. Apart from Scandinavia it is especially the Middle East, the rest of Europe and USA and Canada provide most of the remaining part of the foreign turnover.

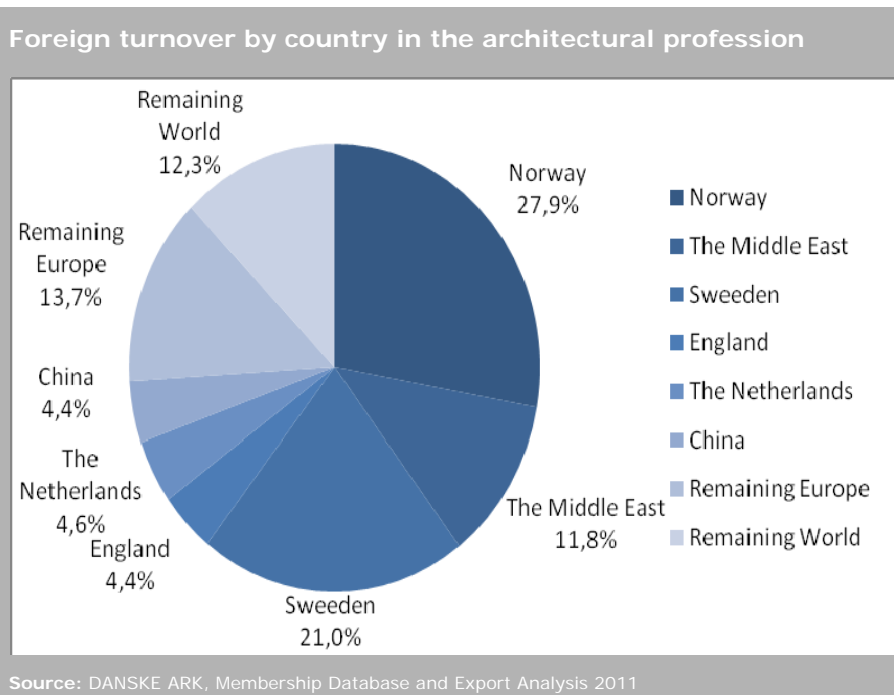


Table 2

The architectural profession consists mainly of small firms with 1 to 9 employees.

Architectural firms by number of employees

Number of employees	Number of firms (per cent)
1 - 9 employees	87,5
10 - 24 employees	7,1
25 - 75 employees	4,6
Over 75 employees	0,8
Total	100,0

Source: DANSKE ARK, Membership Database

Chart 3

Although firms with more than 75 employees represent only 0,8 per cent of the total number of firms, this group of firms accounts for over 20 per cent of the total turnover in the architectural profession.

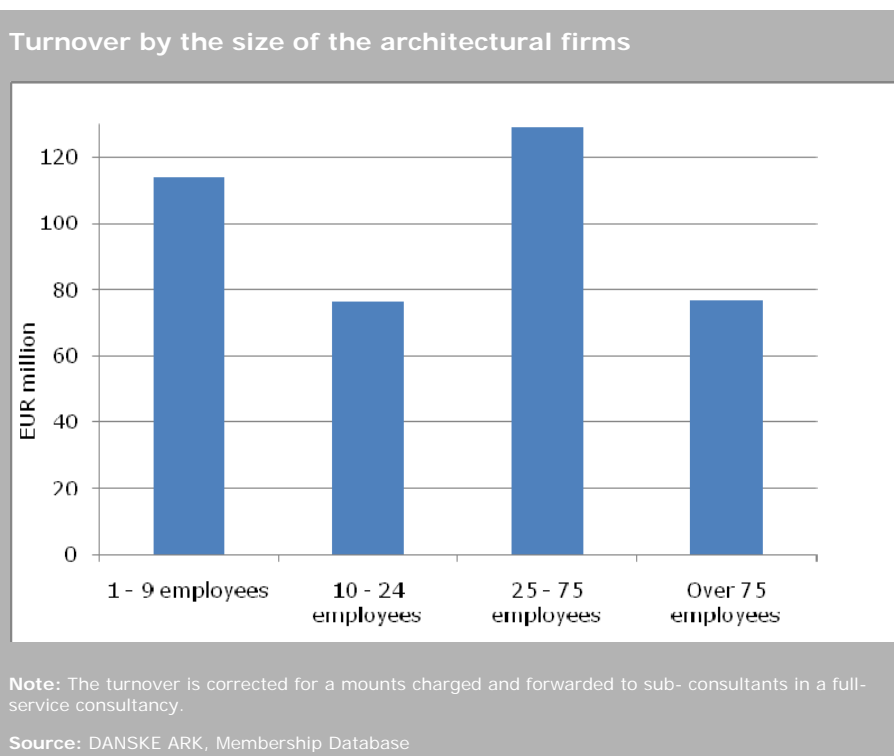


Table 3
More than 50 per cent of the employees are graduate architects.

Employees by education / task	
Education / task	Number (per cent)
Graduate architects	52,3
Constructing architects	18,5
Administration, accounting finance	7,3
Technical Assistant	4,4
Support and facility management	3,0
Other	14,5
Total	100,0

Source: DANSKE ARK, Wages and Employee Statistics 2009

Table 4
More than 90 per cent of the boards of directors are graduate architects and constructing architects.

The board of directors by education	
Education	Number (per cent)
Graduate architects	68,8
Constructing architects	22,5
Other academic degree	6,4
Other	2,3
Total	100,0

Source: The newsletter Mandag Morgen, Fremtidens arkitektbranche, november 2010 and own calculations

The analysis in Mandag Morgen from 2010 shows that 68,8 per cent of the board of directors are graduate architects and 22,5 per cent is constructing architects. Only 8,7 per cent have another education.

Table 5
24 per cent of the Danish companies have a turnover where more than 50 per cent comes from public tender.

Part of turnover from public tender	
	Share (per cent)
More than 50 per cent	24,0
Between 25 and 50 per cent	18,0
Between 10 and 24 per cent	11,0
Between 0 and 10 per cent	45,0
Don't know	2,0
Total	100,0

Source: The newsletter Mandag Morgen, Fremtidens arkitektbranche, november 2010

The analysis shows that 24 per cent of the Danish companies have a turnover where more than 50 per cent comes from public tender. 45 pct. of the companies have a turnover where less than 10 per cent comes from public tender.

The analysis show that in the last couple of years there has been a improved focus on energy and climate adaptation among owners of buildings and other clients. 89 per cent of the companies think that it is important that the architects are prepared to work with energy optimizing and climate adaptation. The architectural firms also consider themselves better prepared than other professional groups for this type of work. The table below shows that 40 per cent find the architectural firms are in a strong competitive position in this area compared with other professional groups. 40 per cent do not share this view but only 15

per cent disagree, with the proposition.

Table 6

40 per cent finds that the architectural firms are in a strong competitive position in this area.

The Danish architectural firms are a strong competitive position in comparison other professional groups the area of energy with optimizing and climate adaptation area.

	Share (per cent)
Complete agreement	9,0
Mostly in agreement	31,0
Do not agree or disagree	40,0
Mostly disagreement	11,0
Complete disagreement	4,0
Doesn't know	5,0
Total	100,0

Source: The newsletter Mandag Morgen, Fremtidens arkitektbranche, november 2010

FURTHER INFORMATION

For further information please contact Bjarne Bonné DANSKE ARK, tel +45 32 83 05 14 or bb@danskeark.dk.