European Architectural Barometer

Index & Trends Q3-2009 (SUMMARY)

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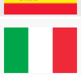
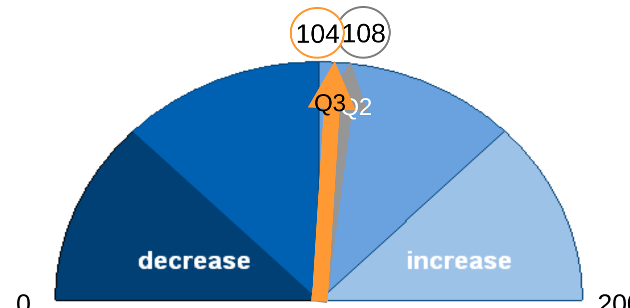
- This is the third quarter in 2009 in which the European Architectural Barometer has been conducted among architects in the UK, Germany, France, Spain, Italy and the Netherlands. The following pages show the key findings per country and comparisons with the previous quarters (Q1 and Q2). The developments in the backlog compared to 2008 and the expectations for the turnover for the next 12 months have been translated into an index to give a quick insight into the trends between the quarters (the explanation of the calculation of the index is found in the appendix). The index figures are shown in the table below.
- Similar to Q2, only in Germany the backlog development compared to 2008 is positive, with more architects that have seen an increase than a decrease in backlog. The comparison in backlog development with 2008 is still the most negative in Spain. However, in Spain as well as in the UK, France and the Netherlands, the backlog development is less negative than in Q2.
- In all countries, a positive trend is seen in the turnover expectations for the next 12 months. Architects in Germany and the UK are more positive and architects in the other countries have less negative turnover expectations compared to the previous quarter. For the turnover expectations as well, the index figure for Spanish architects is still the most negative.

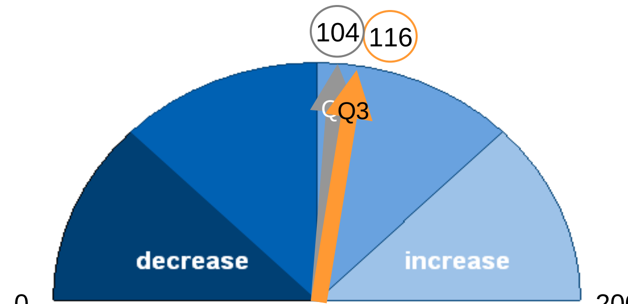
Short-term outlook among European architects (index, n=2,400)

	Index development backlog			Index expectation turnover next 12 months		
	Q1 '09 vs Q1 '08	Q2 '09 vs Q2 '08	Q3 '09 vs Q3 '08	Q1 2009	Q2 2009	Q3 2009
	78	81	99	82	103	115
	91	108	104	95	104	116
	79	72	87	82	86	99
	41	50	56	71	71	81
	54	81	81	57	92	96
	71	73	74	83	89	97

- The most positive picture is still seen with the German architects.
- However, even though the turnover development among German architects compared to Q2 shows a small improvement, the absolute backlog decreased from 7 months in Q2 to 6 months in Q3. In comparison with last year, the backlog development is also slightly lower.
- Yet, half of the architects have not yet experienced any consequences of a crisis at all, and 1 in 3 architects still does not expect any threats this year. As a consequence, the expectations of the German architects for the next 12 months have hardly changed since the previous quarter and turnover expectations remain positive for the next 12 months.



Development backlog 2009 vs 2008



Expectations turnover next 12 months

Short-term outlook among German architects (index)

		Q1 2009 (n=100)	Q2 2009 (n=100)	Q3 2009 (n=200)
Number of projects per FTE		0.6	1.0	1.0
Order backlog in months		5	7	6
Development turnover Q3 vs. Q2 (only Q3)	Index	*	*	102
Expectation empty backlog end year (% yes)		3%	1%	7%
Key consequences economic crisis	Decline in assignments	25%	20%	27%
	Assignments postponed	17%	5%	12%
	No consequences	61%	69%	50%
Segment with highest negative effect	Residential new build	60%	55%	46%
Biggest opportunity in 2009	Possibilities new segments	15%	26%	18%
Biggest threat in 2009	Finance decision postponed	58%	29%	9%
	No threats	26%	52%	33%

Building Information Modeling (BIM)

- Each quarter, our report focuses on a different topic that plays an important role for architects in Europe. This quarter's issue is BIM (Building Information Modeling). BIM is a design and building method whereby the building or construction is developed in a computer as a 3-D model and database. The structure of the software allows BIM to link calculation software to the model. The architecture and building sectors expect much of BIM. The following chapter focuses on the use and awareness of CAD software and BIM among architects, and on the future impact of BIM as well.
- The following topics will be discussed on the next pages:
  - Questions regarding the use of CAD software
  - The awareness of BIM
  - The suitability of CAD software for BIM
  - The advantages of BIM
  - BIM in the future
- The results show that the use of CAD software is very widely spread among architects in several countries. BIM, on the other hand, is barely known by the architects. The small number of architects using BIM consider quick and better planning as an advantage of BIM. Still, the architects do not know how strong the impact of BIM on construction and architecture will be in the future.

Design and data exchange

- The table below shows how architecture firms design and exchange data with other building parties.
- A large majority of the architects in all countries design and make detailed plans using special CAD software.
- Most architects send design or drawings digitally. Only in Spain the number of architects sending designs (44%) and drawings (64%) on paper is still relatively high.
- It is remarkable that in the Netherlands the percentage that still make their initial design on paper is the highest of all countries (21%) although when we are talking about the detailed plans the percentage using CAD software is the highest (93%).

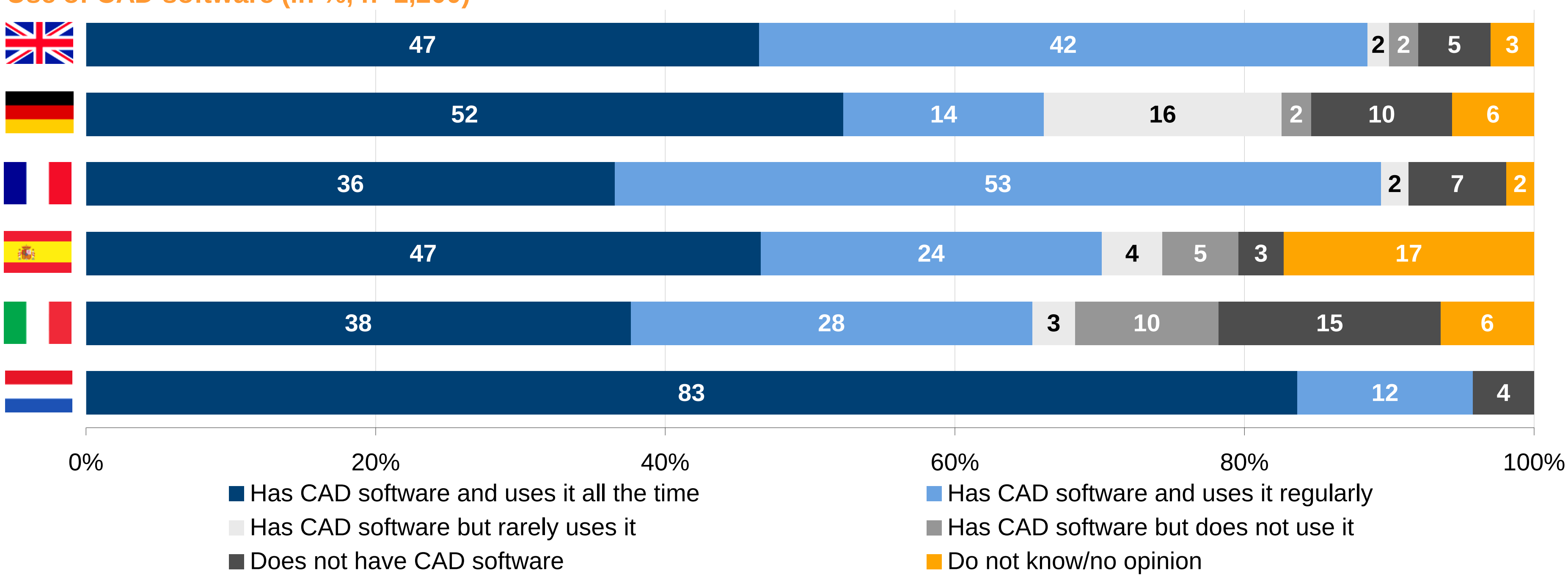
Design and data exchange (in %, n=1,200)

	UK	Germany	France	Spain	Italy	Netherlands
Design mostly on paper	8	19	8	11	17	21
Design using special CAD software	92	73	92	86	83	77
Make detailed plans mostly on paper	10	16	12	13	16	6
Make detailed plans using special CAD software	89	76	87	80	80	93
Clients receive designs on paper	30	31	14	44	37	27
Clients also receive a digital design	68	62	84	49	57	69
Contractors receive drawings on paper	34	39	30	64	27	16
Contractors also receive digital drawings	65	53	68	30	64	81

Use of CAD software

- A large majority of architects in all countries uses CAD software.
- The number of architects using (all the time or regularly) CAD software is the highest in in the Netherlands (96%), followed by the UK and France (both 89%).
- A quarter of the Italian architects does not use CAD software, of which 15% does not even have this kind of software.

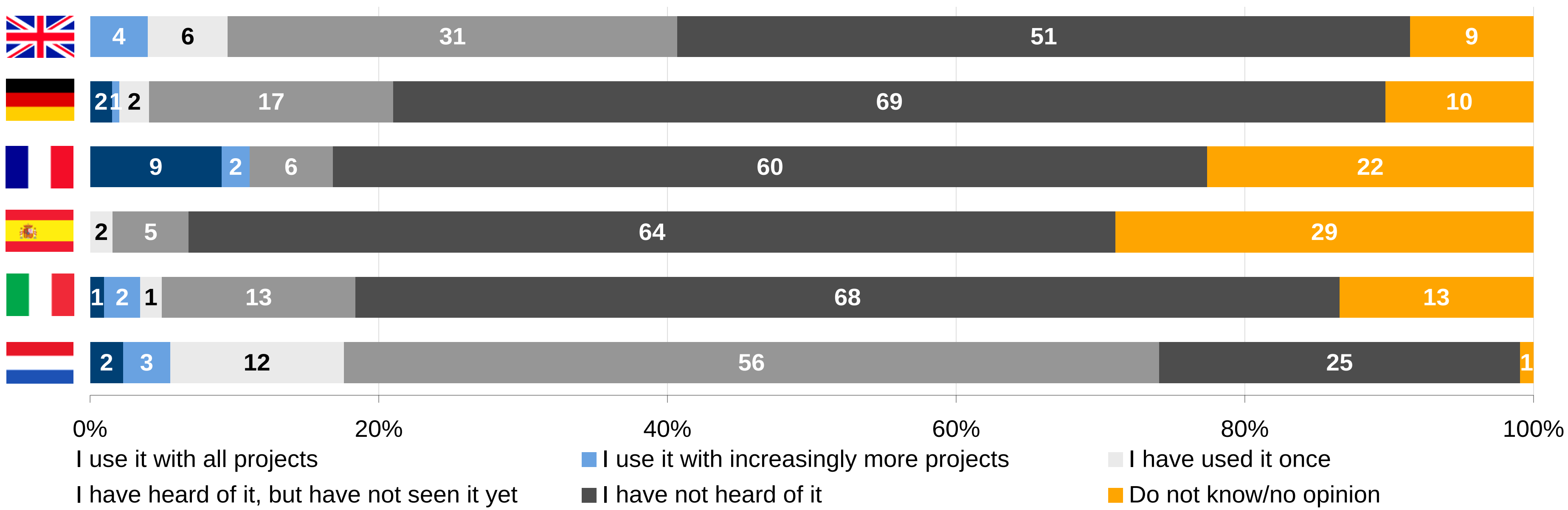
Use of CAD software (in %, n=1,200)



Awareness BIM

- The awareness (74%) and use (17%) of BIM is the highest among the architects in the Netherlands.
- UK architects are also comparably often acquainted with BIM (41%).
- In the other countries, a large majority is unacquainted with BIM.

Awareness BIM (in %, n=1,200)



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