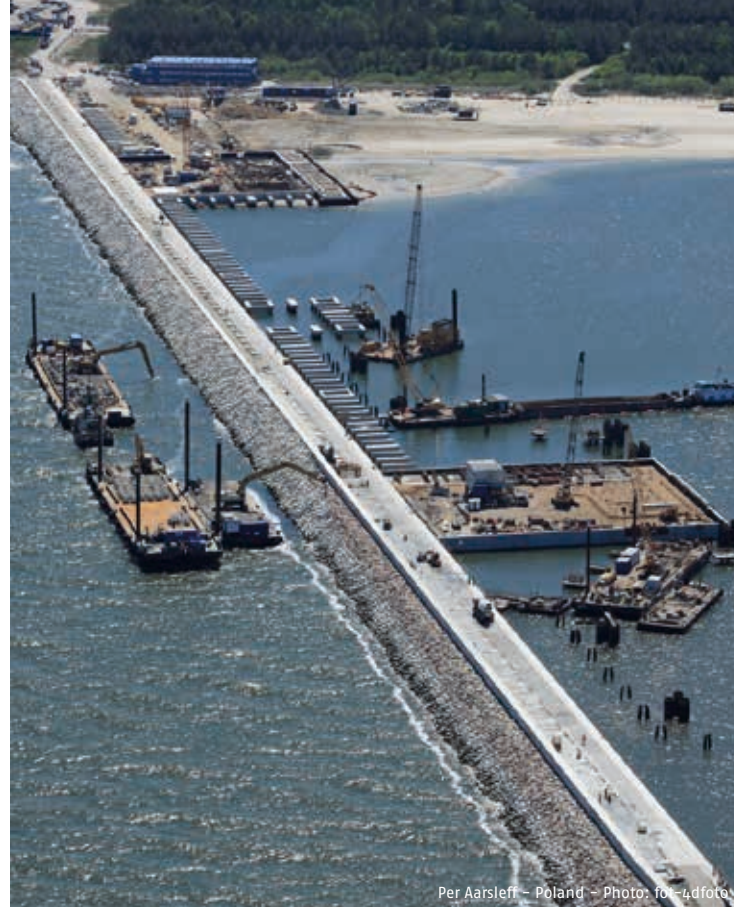




COWI - Qatar - Photo: Claus Knuth



Per Aarsleff - Poland - Photo: fotofoto



Ag5 - Indonesia

## Export Profile 2013

Danish Architects, Consulting Engineers  
and Contractors on Foreign Markets

## The Danish Architects, Consulting Engineers and Contractors

have an extensive international experience and have a strong presence in many foreign markets, Europe being the most important. In 2012 the main tendencies were:

- International turnover decreased slightly to 20.9 billion DKK due to setbacks in the European market
- Share of international turnover is still over 40 percent of total turnover, but can be increased given proper framework conditions
- There is a significant potential in the North American market which currently only amounts to 1.6 percent of the total international turnover

### Development in International Turnover 2009–2012

In million DKK	2009	2010	2011	2012
Danish Architects	409	460 ▲	580 ▲	546 ▼
Danish Consulting Engineers	7,455	8,566 ▲	9,699 ▲	10,816 ▲
Danish Contractors	10,303	9,261 ▼	11,213 ▲	9,605 ▼
In total	18,167	18,286 ▲	21,491 ▲	20,966 ▼

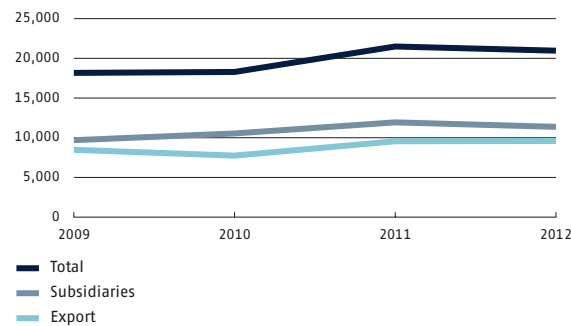
In 2012, Danish architects, consulting engineers and contractors saw a 2.4 percent decline in international turnover compared to 2011. The main reason for the decline was setbacks in the European market, which accounted for 67 percent of the international turnover generated in 2012. As a consequence of the decline, international turnover fell to 40.5 percent of the total turnover in 2012 compared to 42 percent in 2011. That is, however, still a very significant share of the total turnover, which accentuates the importance of the global market.

#### About the Export Profile

The aim of the Export Profile is to show the extent of international work and projects. The Profile is based on data from member companies from the Danish Association of Architectural Firms, the Danish Association of Consulting Engineers (FRI) and the Danish Construction Association, as there is no representative data available from Statistics Denmark.

## Direct Exports and Subsidiaries

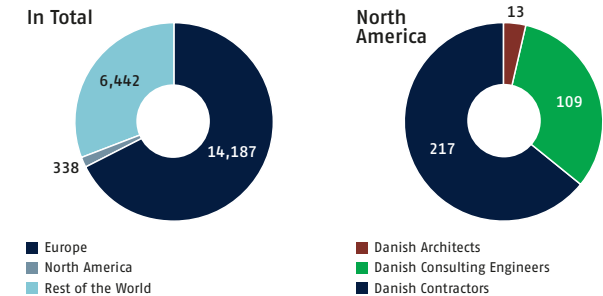
Parent Company or Subsidiary  
international Turnover in million DKK



For the sector as a whole, the share of turnover generated by local subsidiaries exceeds the export based turnover that is generated from home offices in Denmark. In our experience, exports can therefore no longer be viewed in the traditional way of selling a product from country A to country B, but must be seen as international activities in a globalised environment, where the companies gather the team to match the specific project, and the choice of team members is based on qualifications and costs, and not on the parent companies country of origin (defined as Mode 3 trade by the WTO). However, the growth effect of this global approach is directly beneficial for Denmark: Our analyses show that every Danish job created in international projects generates 1½ jobs in related sectors in Denmark.

It is therefore vital that the framework conditions in Denmark are supportive for companies that compete internationally. Essential needs are access to finance and to a highly qualified workforce as well as facilitation of cross-border mobility.

## International Turnover 2012 in million DKK



Danish activities are spread all over the world, but most of the international turnover is still generated in Europe. It seems surprising that the share of international turnover in North America amounts only to 1.6 percent. Especially if one considers the fact that the U.S. economy is still by far the world's largest, and the U.S. is now Denmark's fourth largest export market: The total Danish export, export in services included, exceeded 100 billion DKK in 2012.

There is a great potential for Danish architects, consulting engineers and contractors in the North American market which is showing signs of improvement. In June 2013, unemployment in the U.S.-construction industry was the lowest since 2008. In July builder confidence in the market for newly built, single-family homes rose six points to reach the strongest level since January 2006.

### Annual US Construction Spending

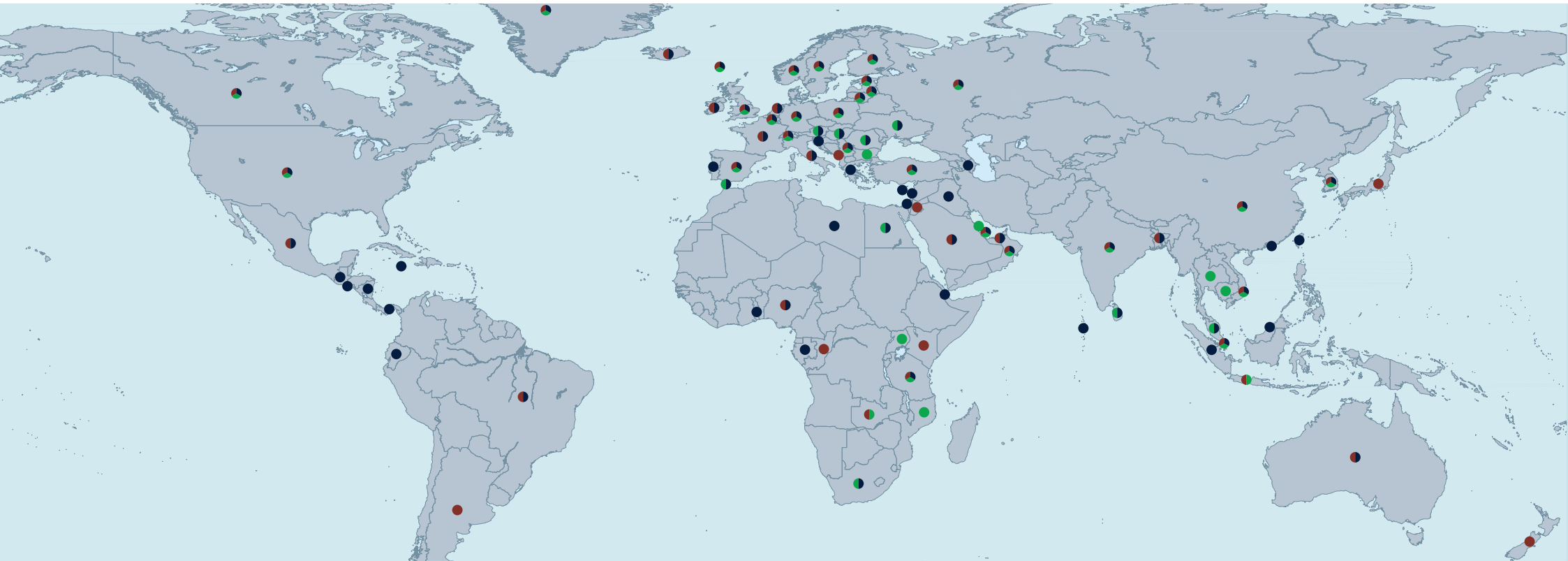
In million dollars (USD)



Source: U.S. Census Bureau

In order to gain foothold on the North American market, Danish companies will have to assert themselves against other global and American competitors. Framework conditions must secure the companies a level playing field. A very important stepping stone is the success of the forthcoming negotiations for a free trade agreement between the U.S. and the EU, the so called Transatlantic Trade and Investment Partnership. The agreement could bring the EU economic gains of 119 billion € a year when fully implemented.

■ Danish Architects, Consulting Engineers (only offices or subsidiaries), and Contractors have had activities in 2012 in the following countries



● Argentina	● Djibouti	● Hungary	● Lithuania	● Qatar	● Thailand
● Australia	● Ecuador	● Iceland	● Malaysia	● Romania	● Togo
● Austria	● Egypt	● India	● Maldive Islands	● Russia	● Turkey
● Azerbaijan	● El Salvador	● Indonesia	● Mexico	● Saudi Arabia	● Uganda
● Bahrain	● Estonia	● Iraq	● Montenegro	● Serbia	● Ukraine
● Bangladesh	● Faroe Islands	● Ireland	● Mozambique	● Singapore	● United Arab Emirates
● Belgium	● Finland	● Israel	● Netherlands	● Slovenia	● United Kingdom
● Brazil	● France and Monaco	● Italy	● New Zealand	● South Africa	● USA
● Brunei	● Gabon	● Jamaica	● Nicaragua	● South Korea	● Vietnam
● Bulgaria	● Germany	● Japan	● Nigeria	● Spain	● Zambia
● Cambodia	● Gibraltar	● Jordan	● Norway	● Sri Lanka	
● Canada	● Greece	● Kenya	● Oman	● Sweden	
● China	● Greenland	● Latvia	● Panama	● Switzerland	
● Congo	● Guatemala	● Lebanon	● Poland	● Taiwan (China)	
● Cyprus	● Hongkong	● Libya	● Portugal	● Tanzania/Zanzibar	

● Danish Association of Architectural Firms   ● Danish Consulting Engineers (only offices or subsidiaries)   ● Danish Contractors



Spæncm - Norway



BIG - USA - Photo: BIG & GLESSNER



Atkins Danmark - Norway  
- Photo: Peter Sørensen



Danielsen Architectur - Norway



Münck Asfalt - Bangladesh



Schmidt Hammer Lassen - UK



MT Højgaard - Panama



DEKO - China



Grontmij - Bangladesh



Henning Larsen Architects - Iceland - Photo: Nic Lehoux

## DANSKE ARKITEKT VIRKSOMHEDER



Foreningen af  
Rådgivende Ingeniører  
FRI

dansk  
byggeri

Danish Association of Architectural firms is the Danish business association of private firms of consulting architects. The association has approximately 800 members in Denmark. In total the firms employ around 5,000 graduate architects, constructing architects and other technical and administrative employees. Nearly all private Danish architectural companies are members of DANSKE ARK. The size of the member firms ranges from single-person firms to Denmark's largest architectural firms with more than 325 employees in Denmark and abroad.

### Danish Association of Architectural firms

Kristen Bernikows Gade 6, DK-1105 Copenhagen K,  
Phone +45 32 83 05 00, info@danskeark.dk, www.danskeark.dk

The Danish Association of Consulting Engineers (FRI) is a trade association for Danish consulting firms providing consulting services, planning and project management on a technical-scientific basis. In addition, member firms provide services in economic as well as non-technical fields with delivery of the relevant systems involved.

FRI member firms provide independent consulting services on market terms. FRI represents the majority of businesses in the industry. FRI member firms employ 12,000 people in Denmark and 23,000 worldwide. Total turnover in the industry amounts to DKK 11.6 bn (€1.6 bn) in Denmark and DKK 8.1 bn (€1.1 bn) in subsidiaries abroad.

### Danish Association of Consulting Engineers (FRI)

Vesterbrogade 1E, 3rd floor, P.O. 367, DK-1504 Copenhagen V,  
Phone +45 35 25 37 37, fri@frinet.dk, www.frinet.dk

The Danish Construction Association is an employers' organisation for approximately 6,000 companies, comprising about 70,000 workers from contracting and manufacturing companies within the Danish building and construction sector.

The member companies, composed of major building contractors, small and medium-sized construction companies and manufacturers of building components, are involved in a range of core activities, from infrastructure and turnkey projects, to contractor work specializing in bricklaying, carpentry and roofing, as well as manufacturing building components, such as doors and windows.

### Danish Construction Association

Noerre Voldgade 106, P.O. 2125, DK-1015 Copenhagen K,  
Phone +45 72 16 00 00, info@danskbyggeri.dk, www.danskbyggeri.dk