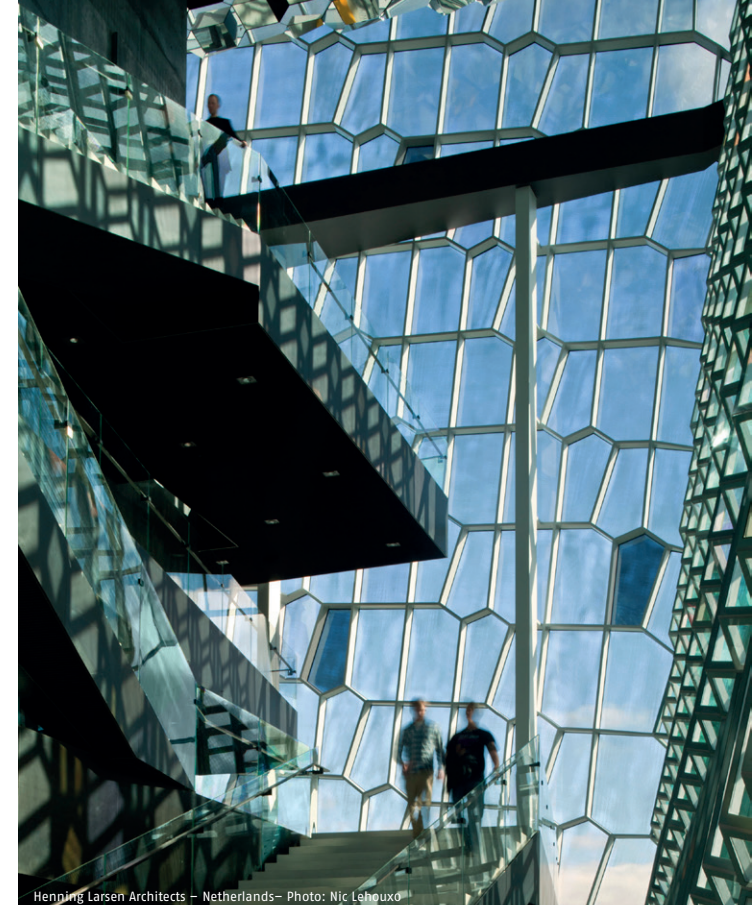




Munck Civil Engineering – Greenland



Ramboll – UK – Photo: Herzog & de Meuron Hayes Davidson



Henning Larsen Architects – Netherlands – Photo: Nic Lehoux

Export Profile 2016

Danish Architects, Consulting Engineers
and Contractors on Foreign Markets

The Danish Architects, Consulting Engineers and Contractors

have extensive international experience and have a strong presence in many foreign markets, Europe being the most important. In 2015 the main tendencies were:

- International turnover increased substantially from 18.5 billion DKK in 2014 to 22.3 billion DKK in 2015
- Export turnover showed minor growth while turnover in foreign subsidiaries increased by 3 billion DKK which was close to 22 percent
- More than 75 percent of international turnover is generated in subsidiaries in 2015
- Despite the close relations with Denmark, Greenland comprises less than one percent of international turnover for Danish Architects, Consulting Engineers and Contractors

Development in International Turnover

In million DKK	2012	2013	2014	2015
Danish Association of Architectural Firms	545 ▼	593 ▲	740 ▲	1,136 ▲
Danish Association of Consulting Engineers	10,815 ▲	11,253 ▲	11,259 ▲	14,321 ▲
Danish Construction Association	10,372 ▼	6,511 ▼	6,457 ▼	6,861 ▲
In total	21,733 ▲	18,357 ▼	18,140 ▼	22,318 ▲

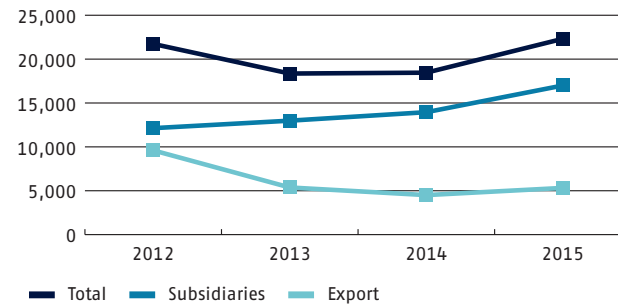
In 2015, Danish architects, consulting engineers and contractors reached an all-time record international turnover. After a few years of negative and stagnating growth, this is a most welcome development. Danish architects have almost tripled* their turnover in foreign subsidiaries in just three years, while the Danish consulting engineers have made several large acquisitions in the period. The Danish contractors are again showing growth in their international turnover after a few years of decline.

The record high turnover shows that the knowledge and expertise that Danish architects, consulting engineers and contractors have to offer are still in demand abroad. Their knowledge is often acquired by working on major projects with a high degree of innovation and complexity in the domestic market. It is therefore essential, that there is a continuous availability of projects in Denmark, so that this valuable knowledge may be maintained and expanded upon.

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.

Direct Exports and Subsidiaries in million DKK

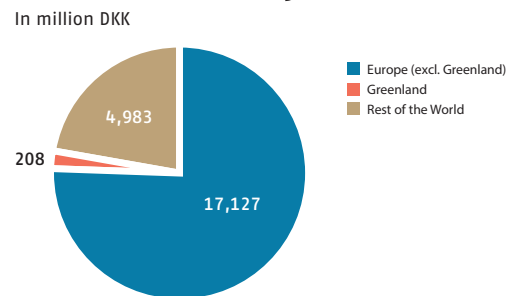


The increase in international turnover is not evenly divided between export and foreign subsidiaries. While export from Denmark grew by 800 million DKK from 2014 to 2015, foreign subsidiaries generated an additional 3 billion DKK in the same period. There was some organic growth, but the majority of this impressive increase in turnover was due to acquisitions of new firms. Turnover in foreign subsidiaries now constitutes more than 75 % of the total international turnover compared to just 56 % in 2012. This is also due to the overall decline in export turnover from 2012 to 2015.

Geography

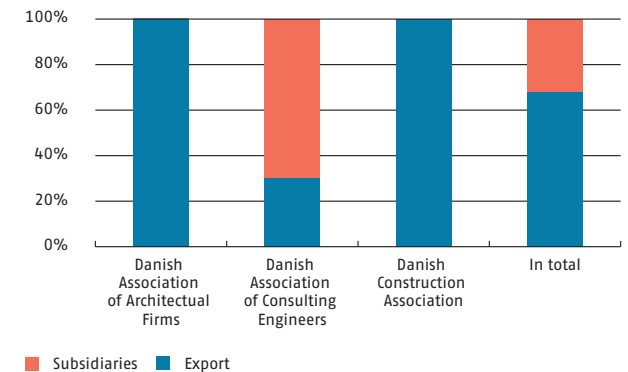
As seen on the following page, Danish architects, consulting engineers and contractors have widespread activities across the globe. The neighbouring markets and especially the Nordic countries generate a substantial amount of the total international turnover for Danish architects, contractors and consulting engineers. One exception to this however is Greenland.

International Turnover 2015



Being a Self-Government and an autonomous market within the Danish Kingdom, Greenland enjoys a special status. In recent years, Danish media have had a strong focus on what seemed to be endless possibilities – in light of climate changes, hidden deposits of gas, oil and rare earth elements, businesses would prosper and employment would thrive. Thus it was natural to see how Danish architects, consulting engineers and contractors have fared exploring these possibilities. But despite the very close ties with Denmark, Danish architects, consulting engineers and contractors only generated 208 million DKK in Greenland. That amounts to less than one percent of the total international turnover. While that might not seem to be a lot, it has to be seen in the context of Greenland's GDP, which is less than 14 billion DKK.

Turnover in Greenland

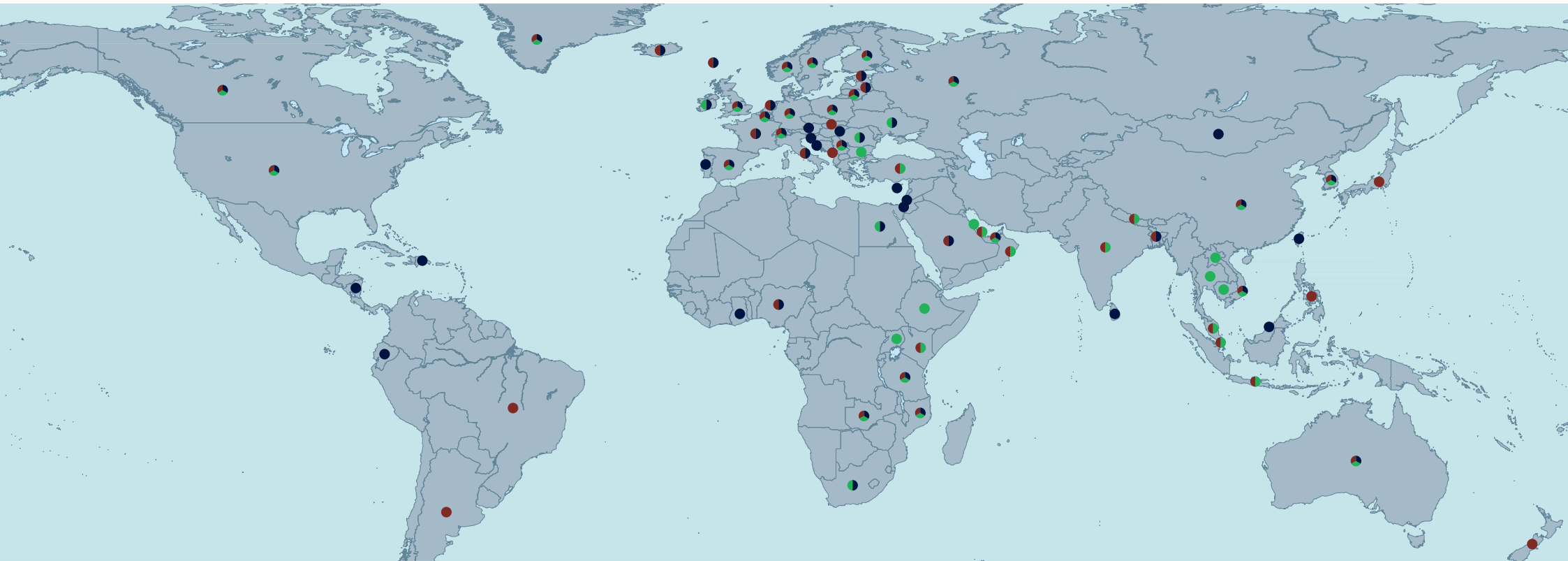


Most of the turnover generated in the Greenlandic market was export from Denmark, with only the consulting engineers having established subsidiaries in Greenland.

Because of the harsh climate, construction projects in Greenland require special skills to design, build and operate buildings and infrastructure in Greenland. This is a knowledge that Danish architects, consulting engineers and contractors possess. They are therefore well prepared to seize the future opportunities that increased availability to the arctic regions and the investments that follow will bring.

* All data from the Danish Association of Architectural Firms has been updated to include turnover in foreign subsidiaries, which did not appear in previous versions of the Export Profile.

■ Danish Architects, Consulting Engineers (only offices or subsidiaries), and Contractors have had activities in 2015 in the following countries



● Argentina	● Dominican Republic	● ● Indonesia	● ● Nepal	● ● Serbia	● Uganda
● ● Australia	● Ecuador	● ● Ireland	● ● Netherlands	● ● Singapore	● ● Ukraine
● Austria	● ● Egypt	● ● Israel	● ● New Zealand	● Slovakia	● ● United Arab Emirates
● Bahrain	● ● Estonia	● ● Italy	● Nicaragua	● Slovenia	● ● United Kingdom
● ● Bangladesh	● Ethiopia	● ● Japan	● ● Nigeria	● ● South Africa	● ● USA
● ● Belgium	● ● Faroe Islands	● ● Kenya	● ● Norway	● ● South Korea	● ● Vietnam
● Brazil	● ● Finland	● ● Laos	● ● Oman	● ● Spain	● ● Zambia
● Brunei	● ● France and Monaco	● ● Latvia	● Philippines	● Sri Lanka	
● Bulgaria	● ● Germany	● ● Lebanon	● ● Poland	● ● Sweden	
● Cambodia	● ● Ghana	● ● Lithuania	● ● Portugal	● ● Switzerland	
● ● Canada	● ● Greenland	● ● Malaysia	● ● Qatar	● ● Taiwan (China)	
● ● China	● ● Hungary	● ● Mongolia	● ● Romania	● ● Tanzania/Zanzibar	
● Croatia	● ● Iceland	● Montenegro	● ● Russia	● Thailand	
● Cyprus	● ● India	● ● Mozambique	● ● Saudi Arabia	● Turkey	

● Danish Association of Architectural Firms (2013) ● Danish Consulting Engineers (only offices or subsidiaries) ● Danish Contractors



Bjarke Ingels Group – UK



Blant Industries – Norway



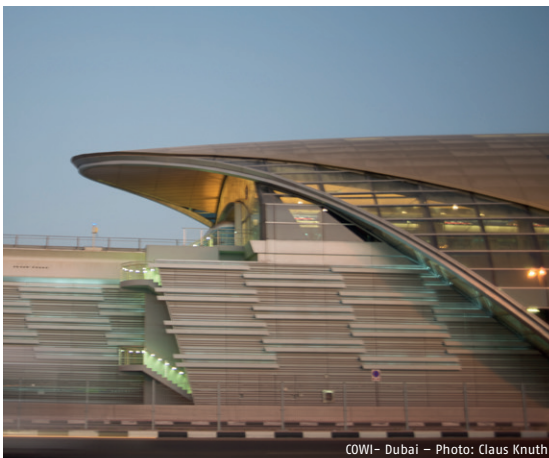
Dorte Mandrup Arkitekter – Greenland – Photo: MIR



Aarsleff – Ethiopia



Kruger ISTD – Switzerland



COWI – Dubai – Photo: Claus Knuth



Obicon – Sweden



Dissing+Weitling – Hongkong – Photo: Wilson Lee

DANSKE ARKITEKT VIRKSOMHEDER

Danish Association of Architectural Firms

Danish Association of Architectural Firms is the Danish business association of private firms of consulting architects. The association has approximately 650 members in Denmark. In total the firms employ around 5.000 graduate architects, constructing architects and other technical and administrative employees. Most of the 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 350 employees in Denmark and abroad.

Danish Association of Architectural Firms

Vesterbrogade 1E, 2.nd floor DK-1620 Copenhagen V
Phone +45 32 83 05 00, info@danskeark.dk, www.danskeark.dk



Foreningen af
Rådgivende Ingeniører
FRI

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 26,000 worldwide. Total turnover in the industry amounts to DKK 12.8 bn (€1.72 bn) in Denmark and DKK 12.1 bn (€1.6 bn) in subsidiaries abroad.

Danish Association of Consulting Engineers (FRI)

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

dansk
byggeri

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, DK-1358 Copenhagen K
Phone +45 72 16 00 00, info@danskbyggeri.dk, www.danskbyggeri.dk