Export Profile 2015
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 2014, the main tendencies were:

- International turnover decreased from 18,140 million DKK in 2013 to 18,092 million DKK in 2014. This could indicate that the negative development over the past two years has stabilised.
- More than 75 percent of international turnover is generated in subsidiaries in 2014.
- Sweden is, after Norway, the second largest international market for the sector and comprises close to 19 percent of the total international turnover.

Development in International Turnover

<table>
<thead>
<tr>
<th>In million DKK</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Danish Association of Architectural Firms</td>
<td>578</td>
<td>545</td>
<td>376</td>
<td>376</td>
</tr>
<tr>
<td>Danish Association of Consulting Engineers</td>
<td>9,698</td>
<td>10,815</td>
<td>11,253</td>
<td>11,259</td>
</tr>
<tr>
<td>Danish Construction Association</td>
<td>11,212</td>
<td>10,372</td>
<td>6,571</td>
<td>6,457</td>
</tr>
<tr>
<td>In total</td>
<td>21,488</td>
<td>21,733</td>
<td>18,140</td>
<td>18,092</td>
</tr>
</tbody>
</table>

In 2014, Danish architects, consulting engineers and contractors saw a marginal decline in international turnover of only 0.3 percent, which could indicate that the international market has somewhat stabilised. For Danish Contractors the adaptation of a more risk adverse strategy on the international markets seems to have halted the negative development over the past years. The impressive growth rates seen by the Danish consulting engineers since 2011 have stalled with the growth in 2014 being negligible.

Direct Exports and Subsidiaries

Development in International Turnover

In million DKK

Where the overall turnover remains close to status quo, the turnover generated by foreign subsidiaries has continued to grow. It now constitutes more than 75 percent of the total international turnover compared to just 56 percent in 2012. The main reason that subsidiaries now account for ¾ of the international turnover is of course the major decline in export turnover from 2012 to 2014.

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. 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 ½ 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.

Geography

International Turnover 2014

In million DKK

Swedish companies have especially had success when bidding for infrastructure projects in Sweden. As a result many of the roads, tunnels and harbours have been designed or built by Danish companies.

Parent Company or Subsidiaries

Turnover in Sweden

Subsidiaries are the predominant source of turnover in Sweden, as they account for 81.7 percent of the total turnover.
Danish Architects, Consulting Engineers (only offices or subsidiaries), and Contractors have had activities in 2014 in the following countries:

- Argentina
- Australia
- Austria
- Bahrain
- Bangladesh
- Belgium
- Brazil
- Brunei
- Bulgaria
- Canada
- Chile
- China
- Croatia
- Cyprus
- Ecuador
- Egypt
- El Salvador
- Estonia
- Ethiopia
- Faroe Islands
- Finland
- France and Monaco
- Georgia
- Germany
- Gibraltar
- Greece
- Greenland
- Guatemala
- Hong Kong
- Hungary
- Iceland
- India
- Indonesia
- Iraq
- Ireland
- Israel
- Italy
- Japan
- Kazakhstan
- Kenya
- Kuwait
- Laos
- Latvia
- Lebanon
- Lithuania
- Macedonia
- Malaysia
- Maldives Islands
- Malta
- Mauritius
- Mexico
- Mongolia
- Montenegro
- Mozambique
- Myanmar
- Namibia
- Nepal
- Netherlands
- New Zealand
- Nicaragua
- Nigeria
- Norway
- North Korea
- Oman
- Panama
- Philippines
- Poland
- Portugal
- Qatar
- Romania
- Russia
- Saudi Arabia
- Serbia
- Singapore
- Slovakia
- Slovenia
- South Africa
- South Korea
- Spain
- Sri Lanka
- Sweden
- Switzerland
- Taiwan (China)
- Tanzania/Zanzibar
- Thailand
- Turkey
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- USA
- Venezuela
- Vietnam
- Zambia
- Zimbabwe

*Note: The map indicates the countries where Danish Architects, Consulting Engineers (only offices or subsidiaries), and Contractors have had activities in 2014.*
Danish Association of Architectural Firms is the Danish business association of private firms of consulting architects. The association has approximately 750 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
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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 12,500 people in Denmark and 25,000 worldwide. Total turnover in the industry amounts to DKK 12.2 bn (€1.63 bn) in Denmark and DKK 9.0 bn (€1.2 bn) in subsidiaries abroad.

The Danish Association of Consulting Engineers (FRI)
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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
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