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Architectural and Engineering Activities and related Technical Consultancy

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Introduction

In mid-1999 Eurostat, with the support of DG Enterprise, began a project to improve the statistical coverage of the business services sector. This Statistics In Focus (SIF) presents results from the reference year 2001 survey on architectural and engineering activities and related technical consultancy (NACE 74.2). Eight Member States (Denmark, Spain, France, Ireland, Portugal, Finland, Sweden and the United Kingdom) have provided partial or full sets of data on a voluntary basis to Eurostat.

Total turnover share of architectural and engineering activities products

The main products as listed in Table 1 of architectural and engineering activities generate a majority of total turnover for this NACE group (NACE 74.2) in most reporting Member States. In Denmark and the United Kingdom this share is just below 50%. In France, Portugal and Finland on the other hand, this share is around 80%. Related Technical Consultancy contributes between 10% and 42% to the total turnover. Urban planning, project management, construction and other architectural services are important contributors to this group.

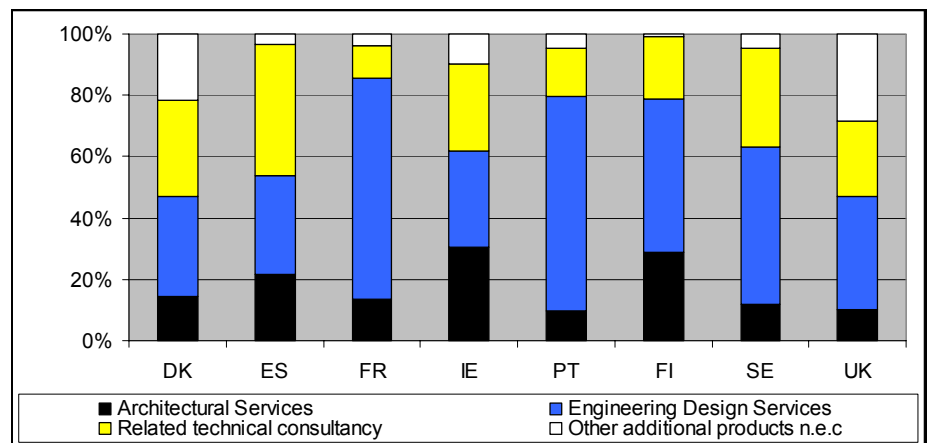


Figure 1: Main products share of total turnover

Detailed turnover by product

As Table 1 shows, in addition to the architectural and engineering activities main products, project management services generate a significant turnover share in Denmark, Spain, Finland, Sweden and the United Kingdom. Construction is an important product in Ireland and the United Kingdom. The residual heading "Other products n.e.c" is a difficult category as it contains products that the enterprises were not able to classify under proper headings. This residual category should preferably have only a small share of turnover – but in Denmark, Ireland and the United Kingdom it represents 22%, 10% and 28% respectively of turnover for NACE 74.2 whereas for other countries it represents less than 5% of total turnover for this sector.



	DK	ES	FR	IE	PT	FI	SE	UK
Advisory and pre-design services	4,6	3,4	3,8	6,5	1,1	3,5	2,8	2,2
Architectural services for buildings	7,8	12,9	8,2	20,4	8,3	24,7	8,4	6,9
Other architectural services	2,0	5,4	1,6	3,3	0,4	0,7	0,6	1,1
Engineering services for buildings	4,2	2,9	6,3	12,2	6,9	8,9	6,8	3,6
Engineering services for M&E installations	5,4	3,8	1,9	5,8	15,5	6,3	11,3	5,4
Engineering services for civil works	3,7	5,9	2,6	8,6	3,7	15,7	5,9	4,3
Engineering services for industrial works	11,1	4,7	9,4	3,0	23,5	6,4	10,0	9,8
Engineering design services n.e.c	8,1	14,8	51,8	1,6	20,1	12,4	16,9	13,5
Urban planning services	0,6	4,4	0,4	1,9	3,6	2,2	0,9	1,3
Project management services	14,7	15,6	4,4	2,5	5,2	12,3	11,3	9,2
Other architectural and engineering services	14,6	21,5	5,4	6,6	4,8	5,5	18,6	6,7
Construction	1,5	1,2	0,2	16,7	2,1	0,3	1,2	7,6
Training services	0,2	0,2	0,1	1,2	0,2	0,1	0,5	0,2
Other additional products n.e.c	21,5	3,3	3,9	9,7	4,6	1,0	4,8	28,2
Total	100	100	100	100	100	100	100	100

Table 1: Detailed Architectural and Engineering Activities Product Data

Total Turnover Share by Product Specialisation

Enterprises have been defined as product-specialised if more than 75% of their turnover comes from the main product of the economic activity group. The turnover share of product-specialised enterprises is over 90% in

Spain, France, Portugal, Finland and Sweden. In Denmark and the United Kingdom the specialisation rate is less than 75%.

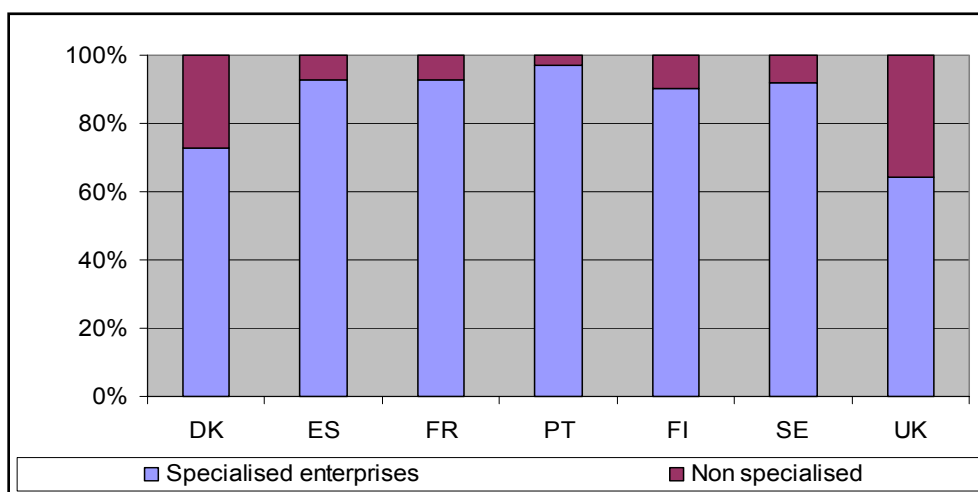


Figure 2: Turnover by Product Specialisation

Turnover by Type of Client

Enterprises are by far the most important group of clients for architectural and engineering activities and related technical consultancy in all reporting countries. The share of enterprise clients is never less than 70%. The public sector is also an important client with a share above 10%.

Households have a significant turnover share of around or above 5% in Denmark, Spain, Ireland, France and Portugal. Unlike other areas covered by the business services project, households are significant clients of this sector, with a share of between 2% and 11%.

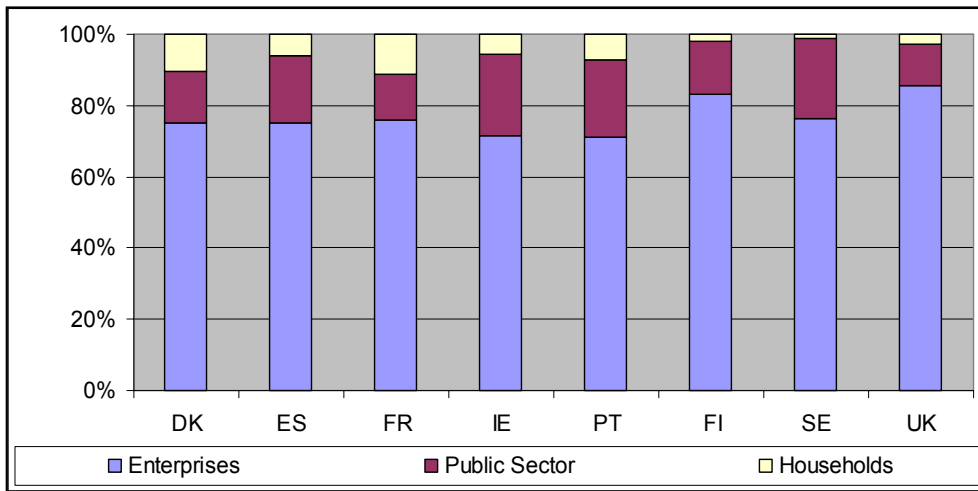


Figure 3: Turnover by Type of Client

Turnover by Residence of Clients

Data on the country of residence of clients, in addition to providing a very rough estimate of the location of clients, can naturally be compared with any data on exports of services available from other sources, thus providing an additional source and check on data that are relatively difficult to obtain. Resident enterprises form the clear majority of

architectural and engineering activities and related technical consultancy clientele, with a share around or above 80% in most reporting countries. The share of non-resident clients is around 20% in France, Finland and the United Kingdom, and nearly 40% in Denmark.

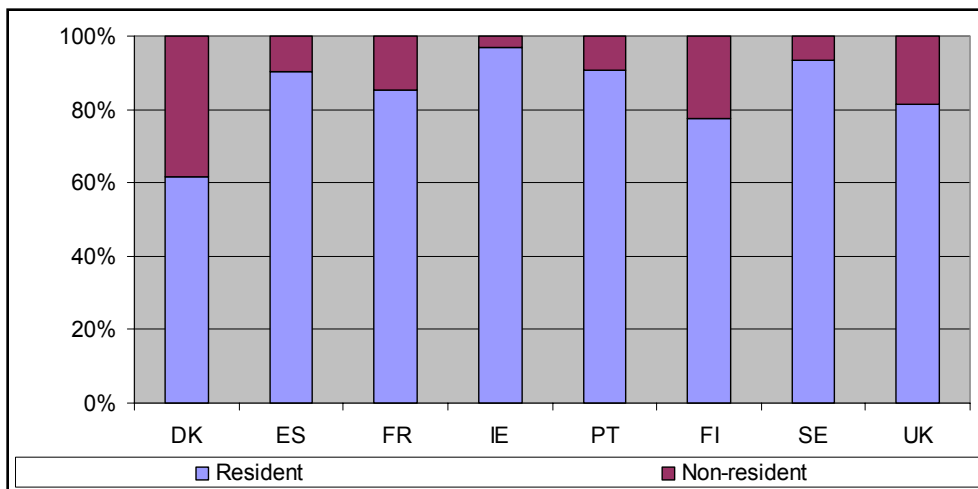


Figure 4: Turnover by Residence of Clients

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Economic activities have been classified using NACE Rev1. The third level of NACE Rev 1 consists of headings identified by a three digit numerical code. Three digit codes are called groups.

Turnover comprises the totals invoiced by the observation unit

during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes.

Further information:

➤ Reference publications

Title Market research and public opinion polling and advertising services
 Catalogue number KS-NP-04-006-EN-C

➤ Databases

NewCronos, Theme 4, Domain: sbs

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