

Economic indicators in the construction sector

The Flemish exercise

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Collecting economic indicators on immovable heritage in Flanders...

How did we get started?

- Agency noticed growing importance of knowledge on the socioeconomic impact of immovable heritage(policy) for policy formulation, implementation, evaluation
 - academic literature, European and foreign policy texts, websites colleague agencies
- Study ordered on the socioeconomic impact of immovable heritage(policy) in Flanders
- Final report in 2011 (De Baerdemaeker et al)

De Baerdemaker et al (2011)

Indicators on

- Production: turnover/value added
 - *Executive industry*: construction, architecture, archaeology, landscapes
 - *Spill-over*: tourism and recreation
- Expenditure:
 - Government (and civil society): subsidies, wages, operating resources...
 - Private: donations, ...
- Income: employment
 - *Executive industry*: construction, architecture, archaeology, landscapes

Some particulars

	2009		
INPUT authorities	Operating funds (million euro)	Subsidies (million euro)	Employment (FTE)
Flanders	33	125	502
OUTPUT executive industry	Turnover (million euro)	Cumulated added value (million euro)	Cumulated employment (FTE)
Construction	269	235	3066
Architecture	25	22	284
Archaeology	45	39	513
TOTAL	339	296 (0,14% GDP)	3.863 (0,15% total employment)
OUTPUT tourism	Turnover (million euro)	Cumulated added value (million euro)	Cumulated employment (FTE)
Horeca	503	351	7912
Other	394	255	3605
TOTAL	898	606 (0,34% of GDP)	11.517 (0,45% of total employment)



Economic indicators

CONSTRUCTION

2014



Design - survey 2014

- All Flemish building contractors
 - *Bias.* What about companies from Brussels, Wallonia, abroad? (lower limit)
- with permit D23 / D24
 - federal permit
 - *Bias.* contractors without this permit also work on historic buildings - maintenance (lower limit)
- were sent a letter of invitation in August 2014
- were reminded two times in Sept-Oct 2014 in case of non-response (telephone or letter)

Questions - survey 2014

- Identification
 - Name of your company
 - Company number
 - Turnover in fiscal year 2013
 - Margin in fiscal year 2013
 - Number of FTE on 31 December 2013
- Immovable heritage
 - % of turnover attributable to heritage-related works
 - % of employment (FTE) attributable to heritage-related works
- Subcontracting
 - % of works given to subcontractors
 - % of works done under subcontracting
- Future developments
 - Growth potential of the sector



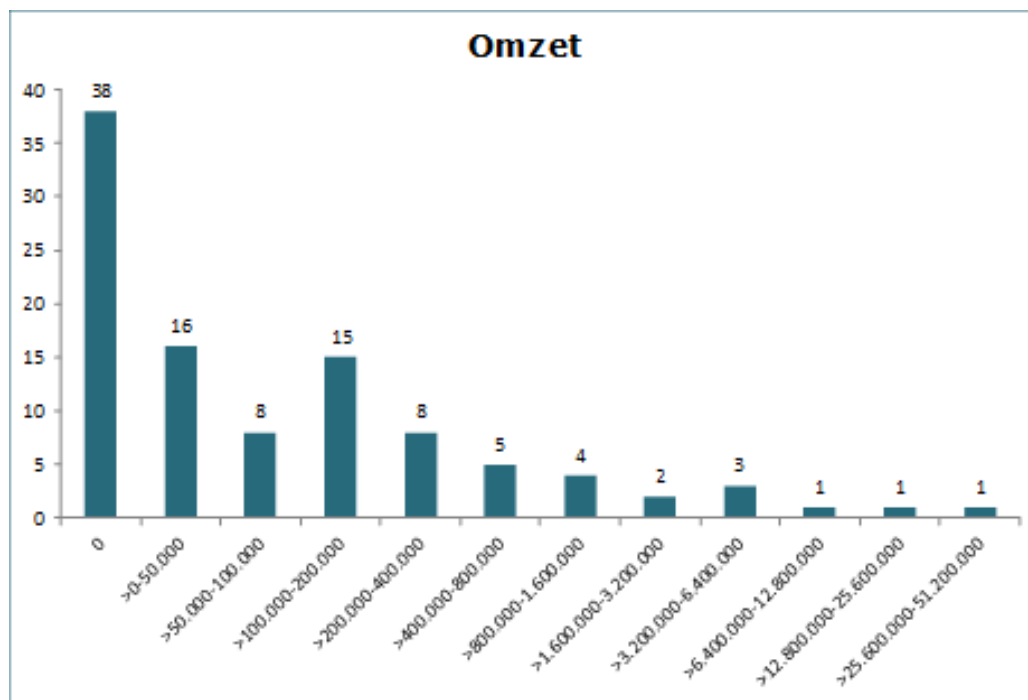
Response – survey 2014

- Response rate 26% (130/503)
- 90% of respondents fully completed the questionnaire
- Average time to fill in 9 minutes, median 5,7 minutes
- 94% of respondents filled in VAT/company number



Response – survey 2014

Figure. Turnover related to immovable heritage (2013)



Results – survey 2014

Turnover 2013
(503 contractors) € 382.514.213

Employment (FTE) 2013 2.431 FTE

Key for construction in Flanders=382.514.213 euro/total turnover of construction sector

Next?

- Survey in 2019
- Improvements to be made
 - Sample of non-D23D24 companies
 - Brussels/Walloon companies active in Flanders?
 - Definition of historic monuments (protected or larger?)
 - Focus on value added
 - ...



Vlaanderen
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