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ARCHITECTS' COUNCIL OF EUROPE

THE ARCHITECTURAL PROFESSION IN EUROPE 2018 A SECTOR STUDY

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THE ARCHITECTURAL PROFESSION IN EUROPE 2018

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FINAL

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“The focus will be put on architecture as a discipline that encompasses the right balance between cultural, social, economic, environmental and technical aspects for the common good”.

This sentence is a quote of the new Work Plan for Culture, concluded by the European Council in December 2018. It is part of the rationale for the inclusion of the topic “High-quality architecture and built environment for everyone” in the Work Plan.

Why do I make this reference here? In my view this quote, from an EU institution, is a fundamental step forward in the view held of the role of architecture and, therefore, architects in our society.

The EU institutions classify us as being part of business services or the construction sector, but our interests differ from those of industry; we are working for the quality of the built environment, for architectural quality and for a better life for the people using it. And this is reflected in the structure of the profession. We are not an industry, or even part of it; we are, by a huge majority, small or even micro enterprises.

This is clearly shown by this Sector Study in the structure of the profession. 71% of practices are one person practices, 25% are 2-5 people, 3% are 6-10. The legal form shows a slightly different

picture. Looking at the last two studies 50 to 60% are working as independent architects, 7 to 10% in partnerships, and 20 to 30% have established a limited company.

On the other hand we see that the income of architectural practices is of moderate scale, and these factors show, that the huge majority of architects are not motivated by income, money and business, but are committed people, having in mind the quality, and let's just say, the beauty of what they are doing: the design and appearance of the built environment.

This year we have added a few questions concerning “Women in architecture”, where we have established a task force last year, and have enlarged the analysis concerning the issues that are relevant to this topic.

We are happy that we enjoyed record participation - more than 30.000 colleagues responded to the questionnaire, and we can use it as a great source of information, which tells us, who we are and enables us to present ourselves to our interlocutors within the EU institutions. This is, in my personal view, the essential asset of this work. Another asset is to enable all those who participated with their data to find themselves in comparison to the results. This might be a reason for all those who haven't yet to participate next time, we do this every second year, so 2020 shall be the next edition.

I want to thank the authors, Mirza & Nacey and the ACE office who guarantee the smooth running of the enquiry, the Member Organisations for their valuable assistance and finally, this year, the Creative Europe programme of the European Commission for its financial support.



Georg Pendl
ACE President

30 000 architects provided data for the 2018 ACE Sector Study

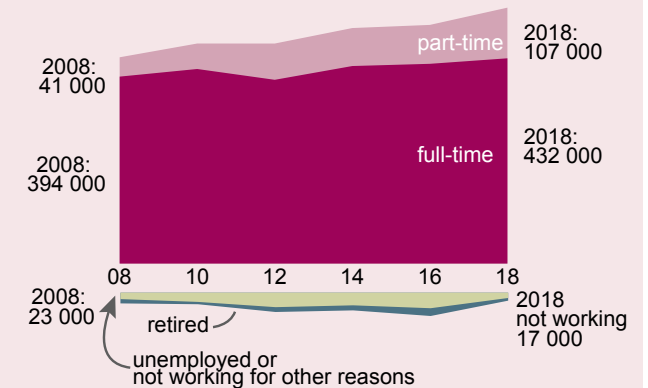
Architecture in Europe is a growing profession
Total number of architects has grown by 24% in 10 years



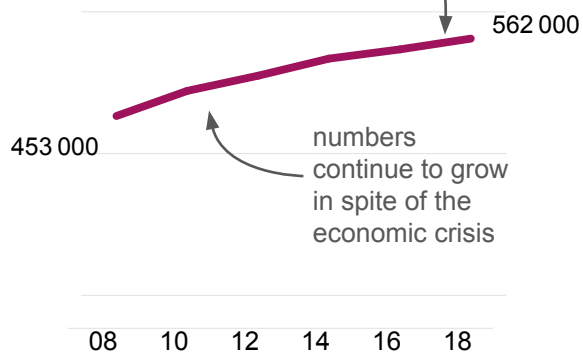
Five countries dominate
Two thirds of Europe's architects are from five countries

Italy	160 000
Germany	111 000
Spain	56 000
United Kingdom	41 000
France	30 000

More architects are working part-time and fewer are unemployed or not working



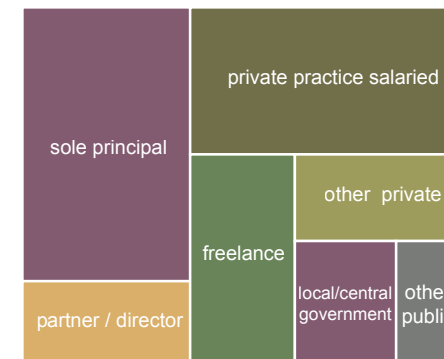
Long-term average increase is 2% per year



562 000

the number of architects in Europe 2018

Independent professionals
More than half of the profession are sole principals, freelance or partner/director





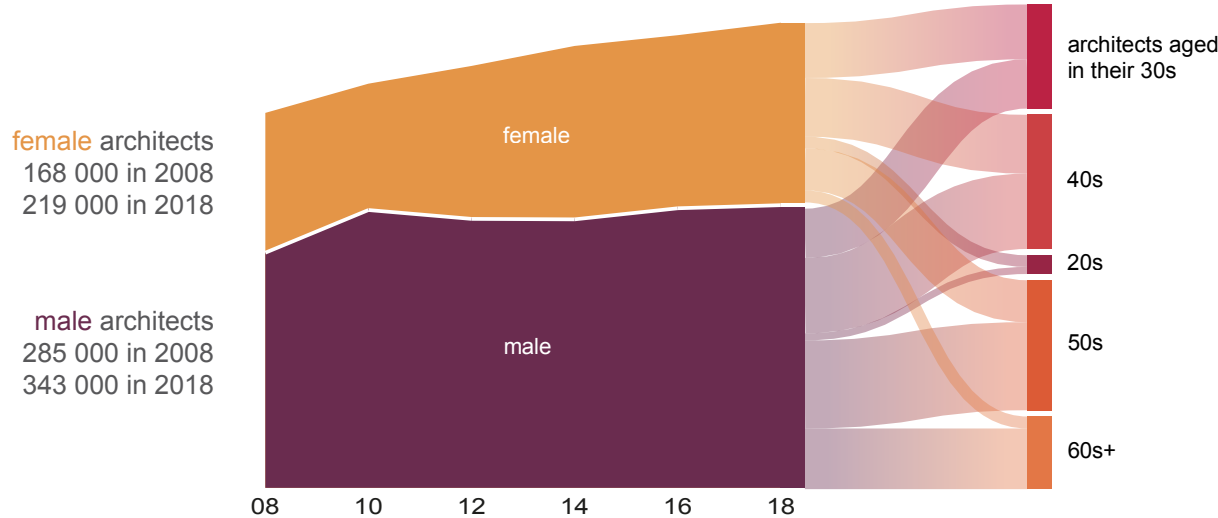
MIRZA & NACEY RESEARCH

Female architects are the majority in the younger age groups

53% of architects in their 30s are female, compared with 32% in their 50s.

The profession has the potential to become more equally balanced than it is today

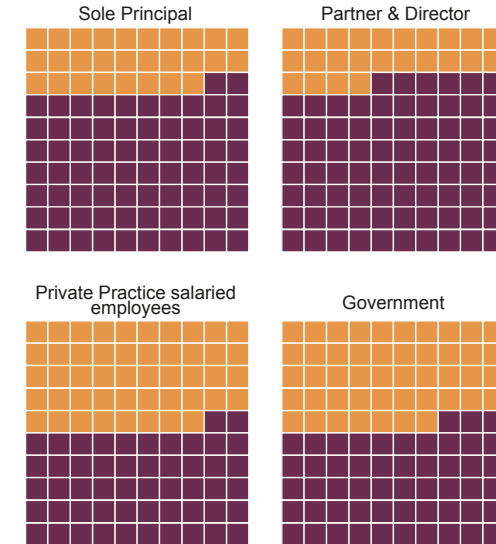
number of architects 2008 to 2018:



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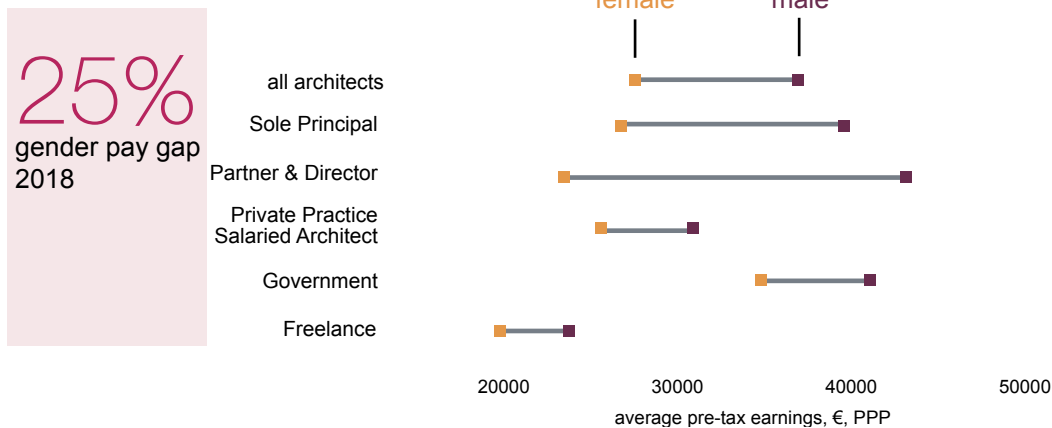
Many more Principals are male

The gender balance of employees in private practice or government is much more equal



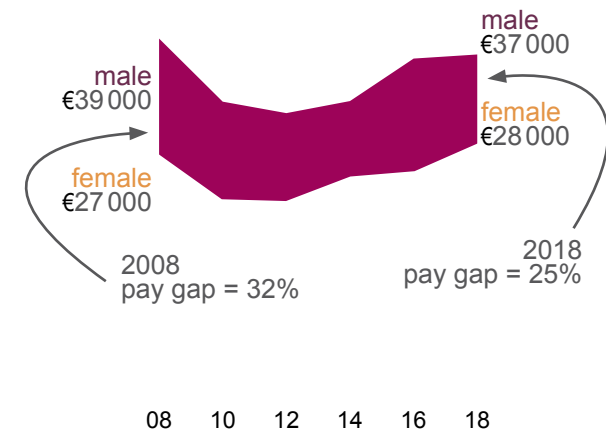
Gender pay gap exists across all employment types

Even amongst private practice salaried architects, where average earnings have the smallest variation, the gender pay gap is 17%

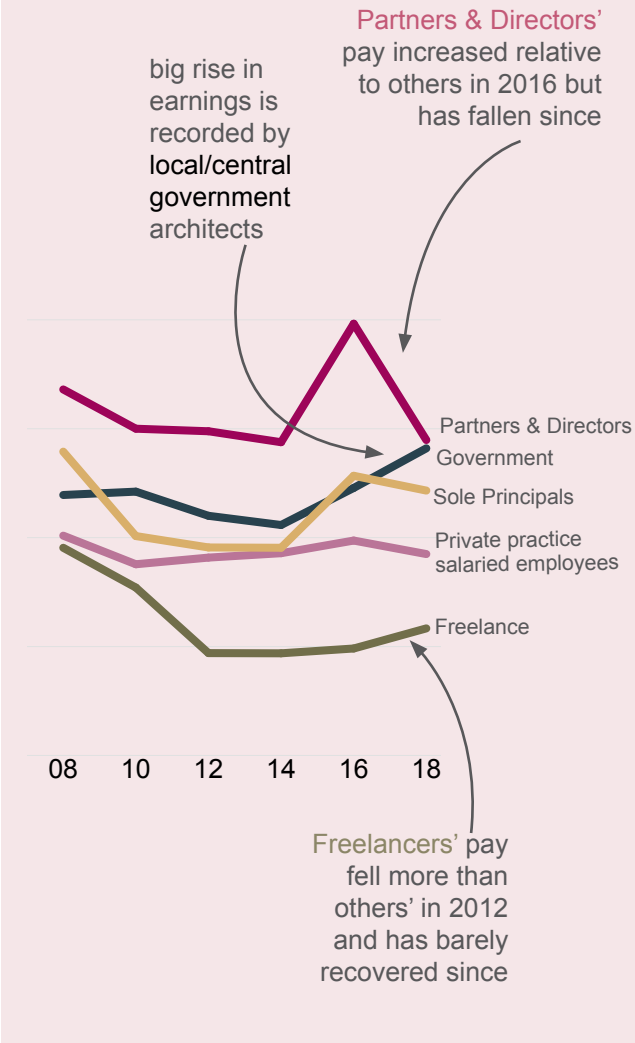


Gender pay gap persists

The gender pay gap has narrowed only very slightly over the last 10 years



Average earnings for Partners & Directors have fallen back
The gap between Partners & Directors and salaried architects in private practice is at its smallest for ten years

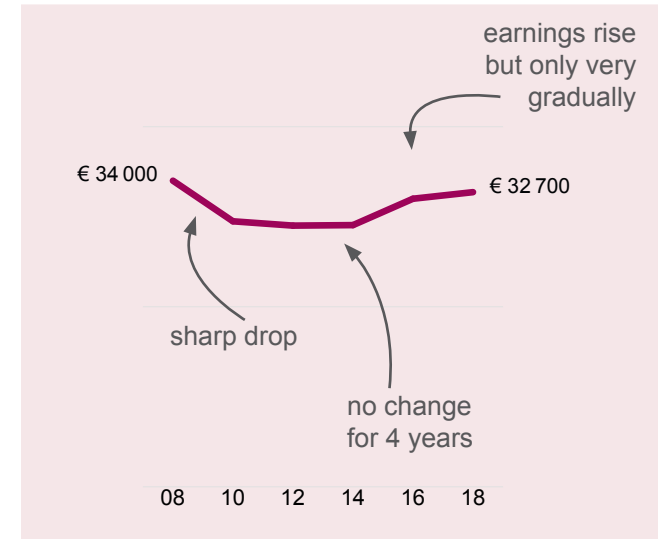


Top five countries for pay
Average earnings for Partners & Directors equalised for purchasing power parity (PPP)

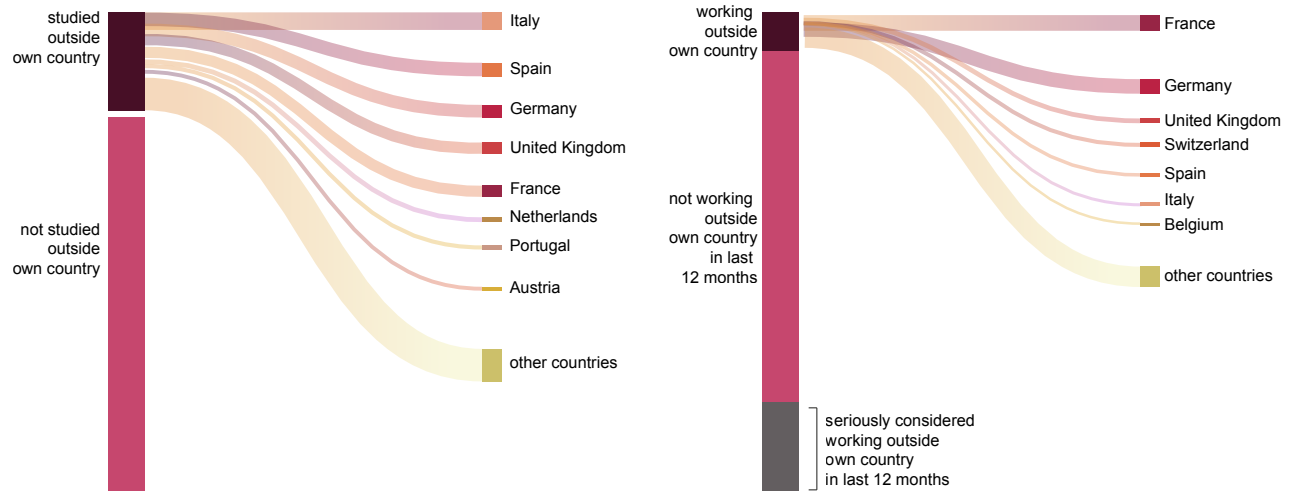
Luxembourg	€ 56 738
Germany	€ 54 286
Norway	€ 46 965
Austria	€ 46 168
Netherlands	€ 44 524

Increase in average earnings since 2016
Earnings remain below 2008 level

2%



Studying and working in another country
20% of architects have studied in another country, 8% worked in another country last year



Market is recovering - slowly

The architectural market started to turn up in 2012 but there has been little change in the rate of increase since



Construction market fell by less than architects' market



Top five architectural markets by value

The same five countries with largest number of architects but in a different order

Germany	€ 4 971 m
United Kingdom	€ 2 265 m
Italy	€ 2 072 m
France	€ 961 m
Netherlands	€ 783 m

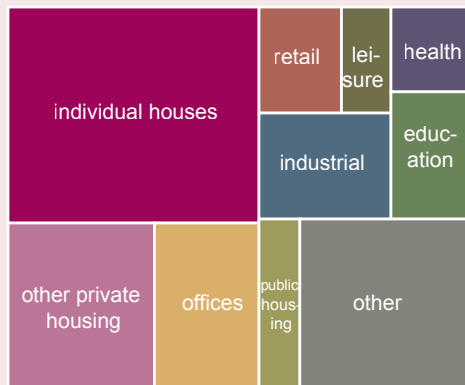
€16400 m

the market for architectural services in Europe 2018

Housing leads the way

More than half of the profession's turnover comes from private housing, particularly small domestic jobs. The proportion of turnover from housing has grown since 2010

2010

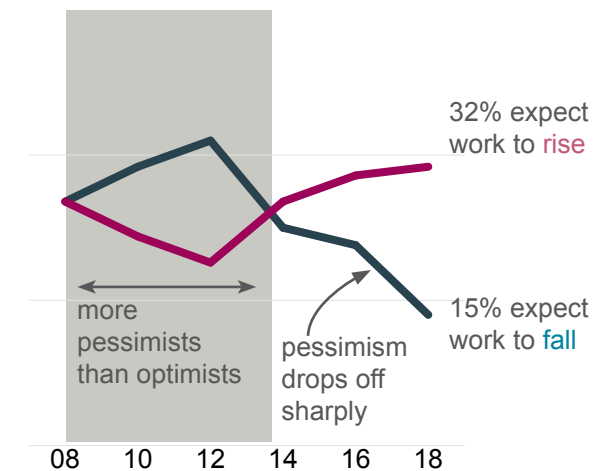


2018



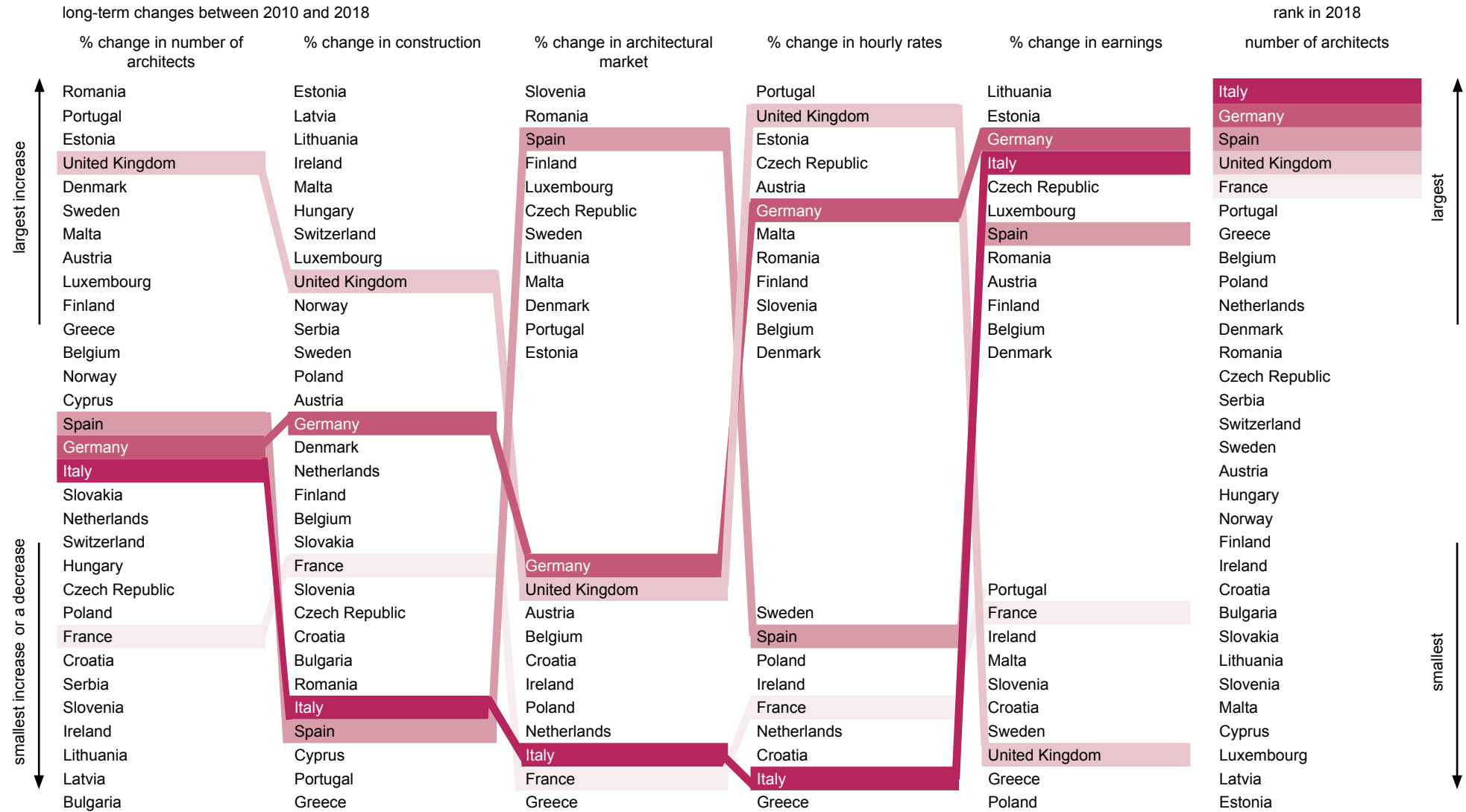
A confident future

Optimists now greatly outweigh pessimists



Countries with the largest number of architects don't necessarily perform the best

The five countries with the largest number of architects (right most column) are highlighted.



Note:

2010 chosen as base year because several more countries participated in the 2010 survey than the 2008 survey.

Comparisons between 2010 and 2018 only possible where the same country participated in both years' surveys, which is why there is less information about earnings, hourly rates and market.



DEFINITIONS

Architects

Persons who are recognised as Architects under the European Union Professional Qualifications Directive and professionally and academically qualified and generally registered / licensed / recognised to practice architecture in the jurisdiction in which they are residing.

Architectural students

Full-time or part-time students following a recognised course of architectural studies leading to a qualification listed in Annexe V7 of the Qualifications Directive (2013/55/EC).

Architectural Staff

Comprises Principals Partners & Directors; Associates; Architects; Technical staff.

Architectural Practices

The form or structure through which architects practice the architectural profession. It includes sole principals, partnerships and limited companies.

Sole Principal

An Architect working independently who provides a full range of architectural services to clients.

Turnover

The total income earned through the provision of services by an architectural practice in a tax year. Excludes VAT.

Not Economically Active

Not engaged in the practice of architecture or any directly associated activity such as research or teaching. Includes architects who are retired and who are unemployed.

Freelance Architect

An architect who contracts his/her services to an architectural practice or organisation and does not accept commissions directly from clients.

Statistical Definitions

Confidence Level

The likelihood that the results are real and repeatable and have not occurred randomly. If the Confidence Level is 50% then the results would be random. We select a Confidence Level of 95% which suggests if you repeat this exercise there is a 95% chance you will achieve similar results.

Mean

A type of average where individual data are added together and then divided by the number of pieces of data

Median

A type of average calculated by placing all individual data in order of magnitude and selecting the middle value.

Quartile

An indication of the bottom or top quarter of the sample calculated by placing all individual data in order of magnitude. The Lower Quartile is the value one quarter of the way up and the Upper Quartile is the value three quarters of the way up this list of data. We have marked countries where accuracy is greater than plus or minus 10 with an asterisk to recommend caution when interpreting the findings. We generally avoid referring to these countries within the text commentary although all countries are included in the charts and maps.



11 ARCHITECTS IN EUROPE



Salling Tower
Place: Aarhus (Denmark)
Architect: Dorte Mandrup
Photo: Quintin Lake & Torben Eskerod

1.1 THE NUMBER OF ARCHITECTS IN EUROPE

The estimated total number of architects in EUROPE-31 is approximately 562 000. The largest number of architects is in Italy, which has 160 000 architects. Germany accounts for another sizeable proportion of Europe's architects with 111 000 architects.

Other countries with high numbers of architects are Spain (56 000), the United Kingdom (41 000) and France (30 000). Analysed as a proportion of the population, the largest number

of architects per 1000 population - are in Italy (2.6 architects per 1000 population), and Portugal (2.1 architects per 1000 population). Taken overall, Europe has 1.0 architects per 1000 population.

This year's survey figure of 562 000 architects in Europe is 3 per cent higher than in the previous survey two years ago. The estimated number of architects continues to climb, at a steady rate. This increase is explained by growing numbers of young architects

entering the profession. Two countries record growth rates, over the last two years, of over ten per cent. These are Romania (13 per cent increase) and the UK (12 per cent higher between 2016 and 2018).

CHART 1-1
ESTIMATED NUMBER OF ARCHITECTS 2018

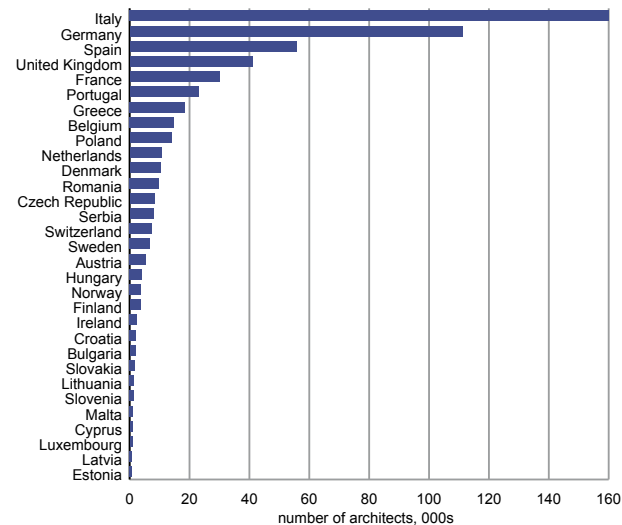
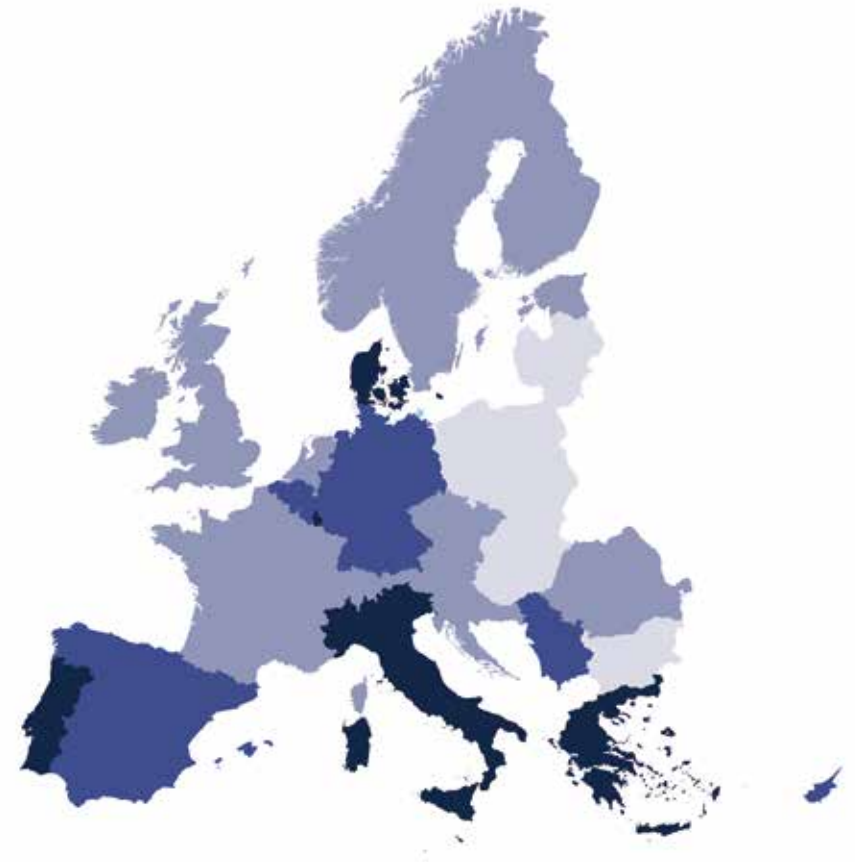
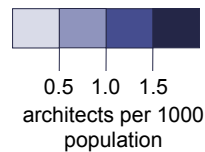


CHART 1-2
NUMBER OF ARCHITECTS PER 1000 POPULATION



General notes for all tables and charts:
EUROPE-31 = all ACE member countries.
EUROPE-26 = all participants in the 2018 survey.
The total Europe-26 figure is weighted to reflect the total architectural population in all participating countries; weighting process described in Appendix.
Some countries have small samples, these are marked *.
Germany survey figures throughout have been provided by the BAK, which included the ACE survey questions in its own survey.

Base: all 31 European countries

TABLE 1-1
ESTIMATED NUMBER OF ARCHITECTS IN EACH COUNTRY AND NUMBER OF ARCHITECTS
PER 1000 POPULATION

	number of architects	population	architects per 1000 population
Austria	5400	8822267	0.6
Belgium	14800	11413058	1.3
Bulgaria	2000	7050034	0.3
Croatia	2200	4105493	0.5
Cyprus	950	864236	1.1
Czech Republic	8300	10610055	0.8
Denmark	10300	5781190	1.8
Estonia	800	1319133	0.6
Finland	3600	5513130	0.7
France	30000	67221943	0.4
Germany	111200	82850000	1.3
Greece	18500	10738868	1.7
Hungary	4200	9778371	0.4
Ireland	2500	4838259	0.5
Italy	160000	60483973	2.6
Latvia	820	1934379	0.4
Lithuania	1400	2808901	0.5
Luxembourg	950	602005	1.6
Malta	1000	475701	2.1
Netherlands	10600	17118084	0.6
Norway	3825	5295619	0.7
Poland	14000	37976687	0.4
Portugal	23000	10291027	2.2
Romania	9900	19523621	0.5
Serbia	8000	7001444	1.1
Slovakia	1730	5443120	0.3
Slovenia	1380	2066880	0.7
Spain	55700	46659302	1.2
Sweden	6750	10120242	0.7
Switzerland	7400	8482152	0.9
United Kingdom	41000	66238007	0.6
EUROPE - 31 - 2018	562200	533427181	1.1
EUROPE - 31 - 2016	547100	530331562	1.0
EUROPE - 31 - 2014	534100	527331308	1.0
EUROPE - 31 - 2012	509930	526727609	1.0
EUROPE - 31 - 2010	488500	519521581	0.9
EUROPE - 31 - 2008	453180	516290802	0.9

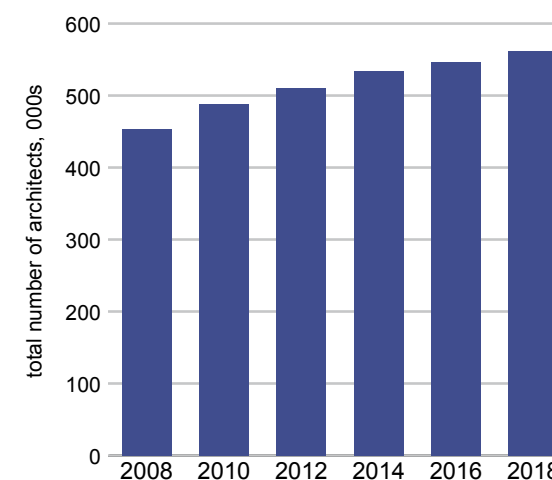
Base: all 31 European countries

Population source: Eurostat population as at 1 January 2018
copyright (c) Eurostat

Number of Architects source: Mirza & Nacey estimates. The starting point was data compiled for the 2008 Sector Study which itself was based on the research publication produced by COAC - Architectural Practice Around the World research by the Col·legi d'Arquitectes de Catalunya (COAC) based on information supplied by national institutes and associations of architects of the individual countries. For the 2008 ACE report this data from COAC was updated using a mixture of primary and secondary sources including Member Organisations' websites and email contact with Member Organisations. Final figures are Mirza & Nacey best estimates based on these several different sources. All figures are 'latest available'.

Note: some 2008 figures were substantially revised in 2010 which accounts for some of the increase between those two years.

CHART 1-3
CHANGE IN ESTIMATED NUMBER OF
ARCHITECTS IN EUROPE-31 2008 TO 2018



Base: all 31 European countries

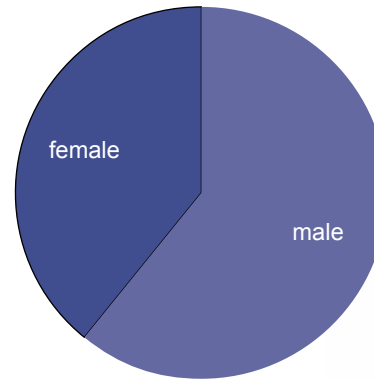
1.2 PROFILE OF ARCHITECTS

TABLE 1-2
GENDER OF ARCHITECTS ANALYSED BY COUNTRY

per cent	gender of architects	
	male	female
Austria	78	22
Belgium	68	32
Croatia	46	54
Cyprus *	80	20
Czech Republic	78	22
Denmark	56	44
Estonia *	74	26
Finland	48	52
France	63	37
Germany **	62	38
Greece	45	55
Hungary *	75	25
Ireland	69	31
Italy	57	43
Lithuania	52	48
Luxembourg *	68	32
Malta *	64	36
Netherlands	77	23
Norway	47	53
Poland *	59	41
Portugal	54	46
Romania	55	45
Slovenia *	52	48
Spain	65	35
Sweden	42	58
United Kingdom	74	26
2018 EUROPE-26***	61	39
2016 EUROPE-27***	62	38
2014 EUROPE-26***	61	39
2012 EUR-25 ***	64	36
2010 EUR- 23 ***	69	31
2008 EUR-17***	63	37

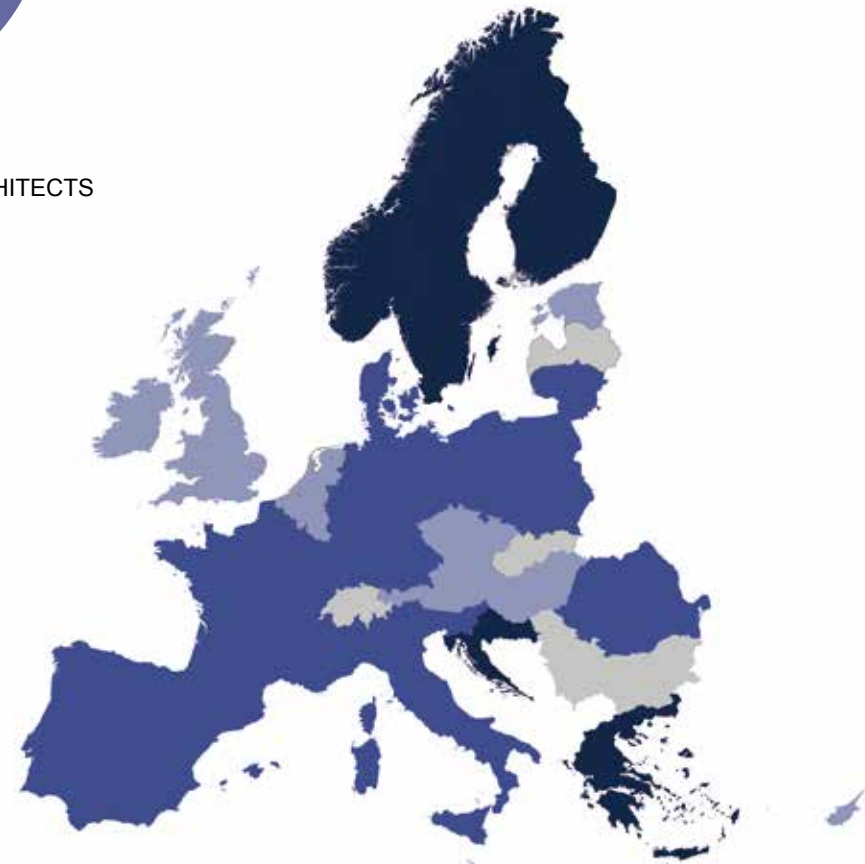
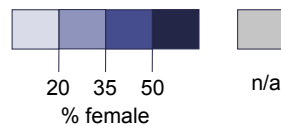
* caution - small sample. ** Germany figures provided by BAK
*** weighted to reflect the total architectural population in all participating countries; weighting process described in Appendix

CHART 1-4
MALE / FEMALE SPLIT ALL RESPONDING ARCHITECTS



The majority of the profession continues to be male; 61 per cent of architects are male, 39 per cent are female. Countries which have the highest proportions of male architects include Austria, the Czech Republic, and the Netherlands. Countries with the highest proportion of female architects include Sweden, Greece, Norway, Croatia and Finland.

CHART 1-5
PROPORTION OF FEMALE ARCHITECTS



1.3 EMPLOYMENT STATUS

TABLE 1-3
EMPLOYMENT STATUS OF ARCHITECTS ANALYSED BY COUNTRY

per cent	working full-time	working part-time	not working	retired
Austria	92	8	0	0
Belgium	92	7	1	0
Croatia	90	9	0	0
Cyprus *	90	10	0	0
Czech Republic	82	18	0	0
Denmark	77	19	1	2
Estonia *	78	13	4	4
Finland	92	7	1	0
France	89	9	1	1
Germany **	81	17	2	0
Greece	74	22	2	2
Hungary *	91	9	0	0
Ireland	88	12	0	0
Italy	67	25	5	2
Lithuania	80	18	0	2
Luxembourg *	96	4	0	0
Malta *	91	9	0	0
Netherlands	66	33	0	0
Norway	94	6	0	0
Poland *	84	16	0	0
Portugal	81	16	2	1
Romania	84	15	1	0
Slovenia *	89	9	0	2
Spain	80	18	2	0
Sweden	90	10	0	0
United Kingdom	76	18	1	5
2018 EUROPE-26 ***	77	19	2	1
2016 EUROPE-27 ***	77	15	6	3
2014 EUROPE-26 ***	78	15	5	2
2012 EUROPE-25 ***	76	15	6	2
2010 EUROPE-23 ***	84	11	4	1
2008 EUROPE-17***	87	9	3	2

* caution - small sample

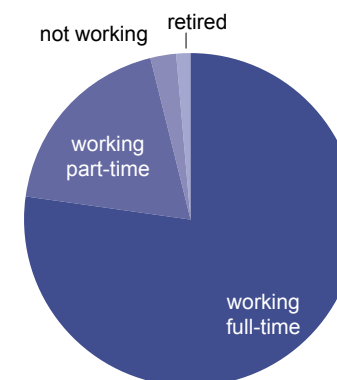
** Germany figures provided by BAK

*** weighted to reflect the total architectural population in all participating countries. The weighting process is explained in the Appendix.

More than three quarters of the profession is working full-time, and most of the remainder are working part-time. The proportion who are not working (unemployed or for other reasons) this year is 2 per cent. Although the proportion of architects working full-time is similar to that recorded since 2012, the proportion of architects not working has fallen to the lowest level recorded in this survey. Consequently, there has been a significant increase in the proportion of architects working part-time.

The highest proportion of architects working part-time is in Italy (25 per cent), the Netherlands (33 per cent) and Greece (22 per cent). The highest proportion of architects not working is in Italy, at 5 per cent.

CHART 1-6
EMPLOYMENT STATUS OF ARCHITECTS





1.4 FIELD OF EMPLOYMENT

Sole Principals make up the largest group of architects; 29 per cent. Nine per cent of architects are Partners and Directors, so well over one third of the profession run their own business. One quarter of architects are employed in private practices, as Associates or salaried staff. Another 9 per cent describe themselves as Freelance. The public sector employs 14 per cent of architects, half of whom are working for local, municipal, regional or central government.

Austria has the highest proportion of Sole Principals (65 per cent) and also, along with Croatia, the highest proportion of Partners & Directors (32 per cent).

More architects are employed in private practice in Sweden and Norway than elsewhere - more than 50 per cent of the profession, including salaried and Associates.

More than a quarter of architects in Belgium, France and the Czech Republic are freelance.

Countries with the highest proportions of architects working in the public sector are Finland, Denmark, Sweden and Portugal.

CHART 1-8
MAIN EMPLOYMENT FIELDS BY COUNTRY

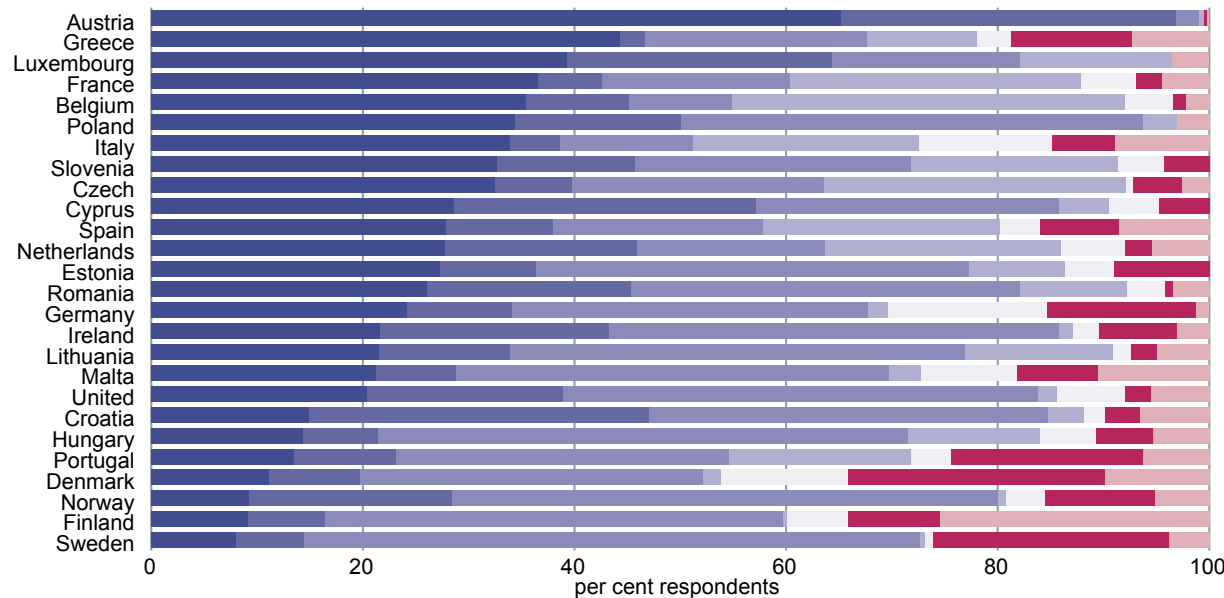


CHART 1-7
FIELD OF EMPLOYMENT

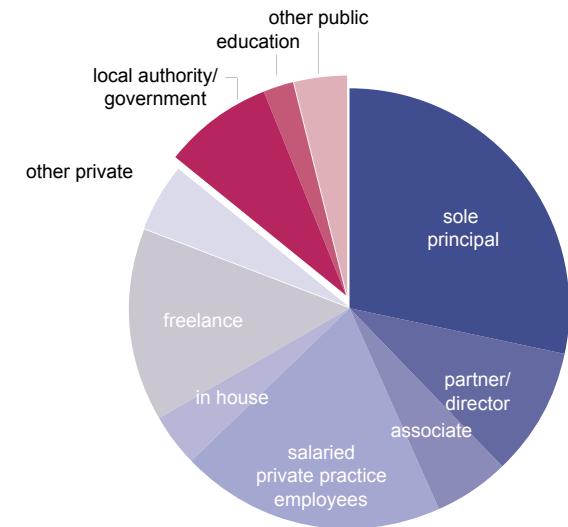




TABLE 1-4
ARCHITECTS' FIELD OF EMPLOYMENT BY COUNTRY

per cent	sole principal	partner director	associate	private practice salaried employees	in-house	agency **	freelance/short-term contract	other private	local authority	central govt	education	other public
Austria	65	32	0	2	0	0	1	0	0	0	0	0
Belgium	35	10	5	5	1	0	37	3	1	0	1	1
Croatia	15	32	7	31	1	0	3	1	3	0	2	4
Cyprus *	29	29	5	24	5	0	5	0	0	5	0	0
Czech Republic	32	7	9	15	0	0	28	1	5	0	1	1
Denmark	11	9	2	30	3	0	2	9	21	3	6	4
Estonia *	27	9	23	18	0	0	9	5	5	5	0	0
Finland	9	7	6	38	1	0	0	5	4	5	6	20
France	37	6	13	4	0	0	28	5	2	0	1	4
Germany	24	10	0	34	14	0	2	1	13	1	0	1
Greece	44	2	7	14	0	0	10	3	9	2	4	3
Hungary *	14	7	9	41	2	0	13	4	2	4	2	4
Ireland	22	22	11	31	1	0	1	2	5	2	1	2
Italy	34	5	6	6	2	0	21	10	5	1	4	5
Lithuania	21	12	4	39	1	0	14	1	2	0	2	3
Luxembourg *	39	25	14	4	0	0	14	0	0	0	0	4
Malta *	21	8	9	32	2	0	3	8	2	6	5	6
Netherlands	28	18	3	15	2	0	22	4	2	1	2	4
Norway	9	19	7	45	0	0	1	3	9	2	3	2
Poland *	34	16	3	41	0	0	3	0	0	0	0	3
Portugal	13	10	3	29	1	0	17	3	17	2	2	4
Romania	26	19	6	31	1	0	10	3	1	0	2	2
Slovenia *	33	13	0	26	4	0	20	0	4	0	0	0
Spain	28	10	4	16	1	0	22	3	7	1	3	5
Sweden	8	7	7	52	0	0	0	1	18	4	2	1
United Kingdom	20	19	14	31	1	0	2	5	1	1	2	3
2018 EUROPE-26	29	9	5	20	4	0	14	5	7	1	2	4
2016 EUROPE-27	26	8	6	16	1	10	15	5	6	1	3	3
2014 EUROPE-26	29	9	7	20	2	7	8	4	7	1	2	3
2012 EUROPE-25	32	11	7	16	2	8	10	5	5	1	1	3
2010 EUROPE-23	39	12	6	16	1	4	11	4	3	1	2	2
2008 EUROPE-17	24	16	5	22	3	6	9	4	6	1	2	3

* caution - small sample

** 'agency' was offered as a staff category in previous surveys but was removed from 2018

1.5 YEARS QUALIFIED AS AN ARCHITECT

Architects in Europe are an experienced profession; three quarters of architects have at least 10 years' experience, and half of these have 20 years' experience or more.

Just 15 per cent of architects in Europe have 5 years or less experience; the proportion is higher than this in Poland, Croatia and Luxembourg.

The profession's experience profile has not changed significantly over the course of this survey.

CHART 1-9
NUMBER OF YEARS ARCHITECTS
HAVE BEEN QUALIFIED

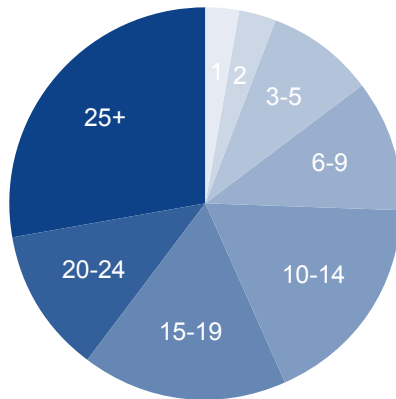


TABLE 1-5
NUMBER OF YEARS QUALIFIED AS AN ARCHITECT ANALYSED BY COUNTRY

per cent	number of years qualified as an architect							
	1	2	3 to 5	6 to 9	10 to 14	15 to 19	20 to 24	25 +
Austria	6	3	9	11	17	19	14	22
Belgium	8	5	13	10	15	9	8	33
Croatia	0	1	10	14	13	16	14	31
Cyprus *	0	5	33	5	10	0	14	33
Czech Republic	0	0	5	15	18	13	10	40
Denmark	4	3	8	10	11	13	11	40
Estonia *	0	0	4	13	4	9	4	65
Finland	1	2	8	9	12	16	18	35
France	3	3	8	10	16	15	9	35
Germany	0	0	5	10	16	18	17	35
Greece	2	3	9	16	18	12	9	31
Hungary *	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Ireland	3	0	7	9	17	12	16	36
Italy	4	3	8	11	17	18	13	26
Lithuania	0	1	4	15	25	8	5	42
Luxembourg *	4	0	0	11	21	21	14	29
Malta *	6	9	20	21	14	14	3	14
Netherlands	1	2	8	10	18	14	12	36
Norway	4	6	14	15	18	12	10	22
Poland *	3	9	25	16	25	13	9	0
Portugal	3	3	15	12	21	17	12	17
Romania	1	4	20	19	19	13	7	16
Slovenia *	0	2	2	17	30	13	7	28
Spain	7	3	13	8	23	22	7	18
Sweden	3	5	11	13	19	13	13	23
United Kingdom	4	5	10	10	12	9	9	41
2018 EUR-26	3	3	9	11	18	17	12	28
2016 EUR-27	3	4	10	13	19	14	10	27
2014 EUR-26	3	3	9	15	19	14	12	27
2012 EUR-25	3	4	12	16	19	11	11	24
2010 EUR-23	3	5	16	14	12	9	12	28
2008 EUR-17	4	3	11	17	17	12	13	23

* caution - small sample

1.6 AGE PROFILE OF ARCHITECTS

Three out of ten architects are aged under 40, another three out of ten are in their forties. The remaining architects are aged 50 and over. There are five countries where the profile is skewed towards the younger age groups; in Poland, Malta, Hungary, Cyprus and Romania at least 50 per cent of architects are aged under 40.

The average age of female architects is younger than men; 30 per cent of female architects are aged 50 or more, compared with 53 per cent of males. The difference is even greater amongst the younger age groups; 38 per cent of female architects are aged under 40, compared with 20 per cent of male architects.

CHART 1-11
PROPORTION OF ARCHITECTS AGED UNDER 40

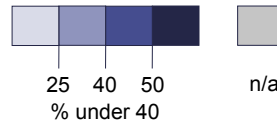


CHART 1-10
AGE PROFILE OF ARCHITECTS

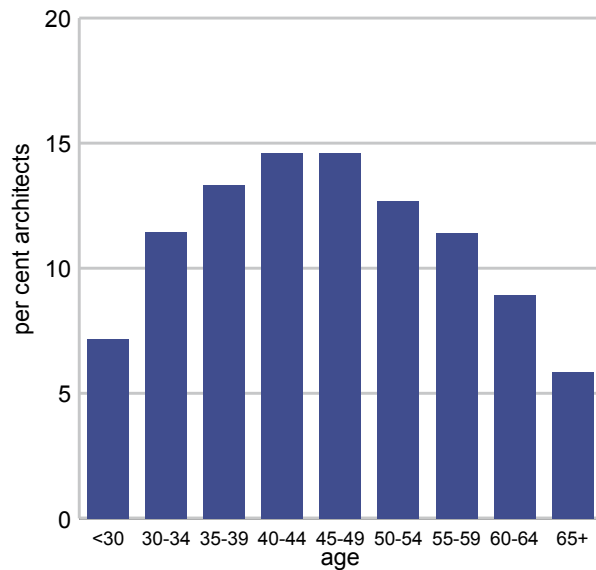
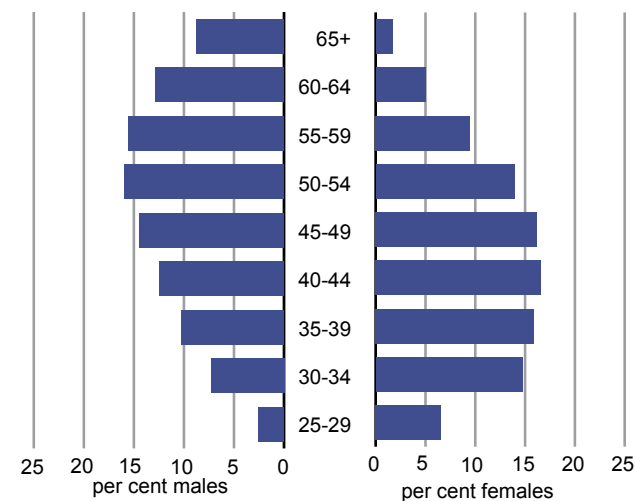


TABLE 1-6
AGE OF ARCHITECTS ANALYSED BY COUNTRY

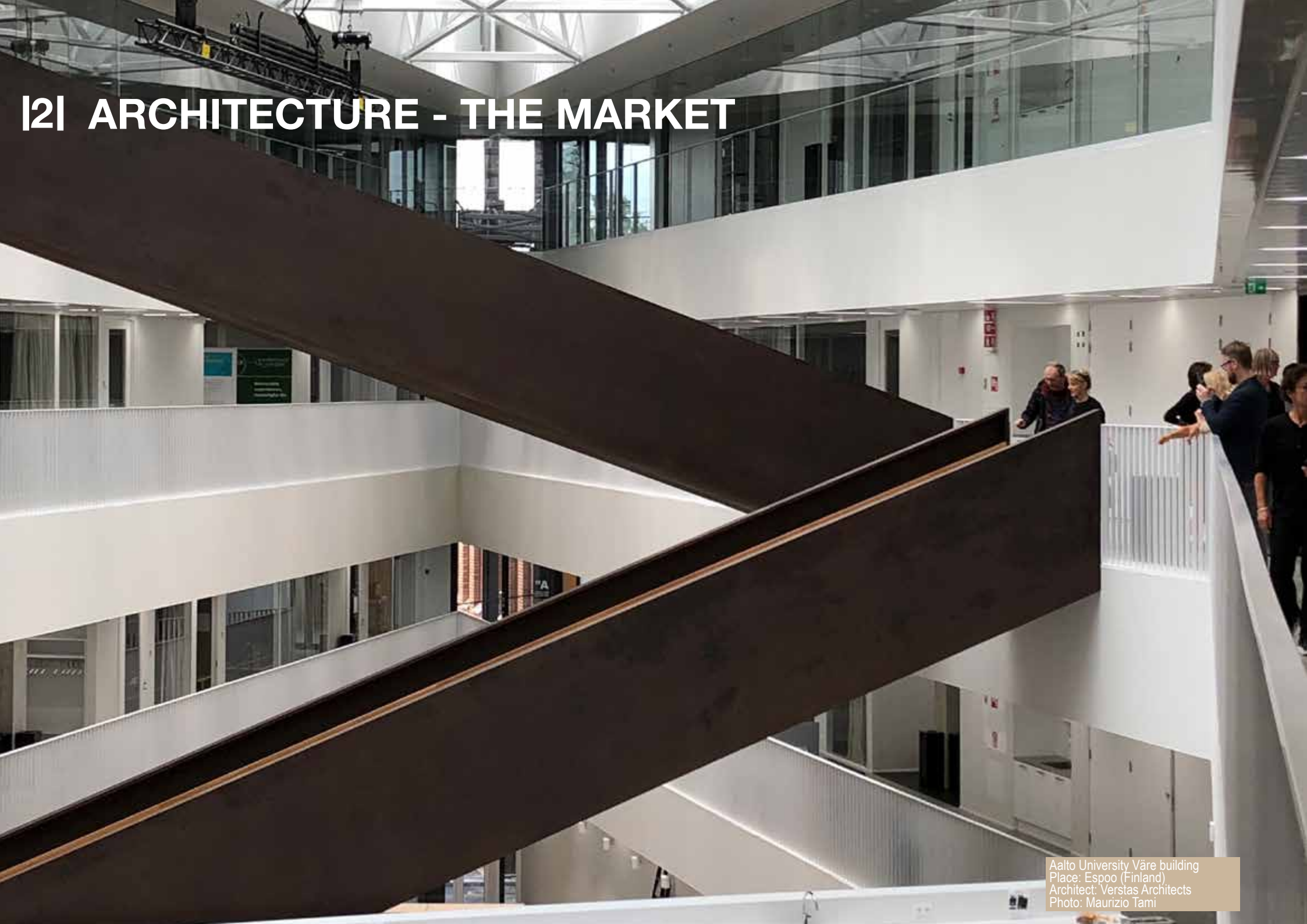
per cent	age of architects								
	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	2	2	8	19	21	16	12	12	8
Belgium	20	13	14	10	9	9	12	9	3
Croatia	3	13	17	14	10	13	12	8	8
Cyprus *	10	30	10	0	10	10	10	5	15
Czech Republic	1	18	13	16	10	5	9	15	14
Denmark	5	12	9	9	14	10	13	16	13
Estonia *	5	0	14	18	0	0	14	18	32
Finland	5	8	6	13	13	17	16	16	7
France	3	10	12	14	15	11	13	12	9
Germany	1	8	12	14	15	18	17	10	4
Greece	5	17	17	16	11	6	11	13	4
Hungary *	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Ireland	4	7	17	19	11	12	9	11	10
Italy	6	10	11	13	17	15	11	9	7
Lithuania	5	24	14	10	4	8	15	13	7
Luxembourg *	0	4	18	21	21	4	14	14	4
Malta *	32	24	11	17	3	3	2	5	5
Netherlands	3	8	14	15	14	12	9	8	17
Norway	10	18	16	15	8	12	8	10	1
Poland *	34	19	19	13	9	0	6	0	0
Portugal	11	17	18	20	13	8	6	3	4
Romania	10	31	20	14	7	4	4	5	5
Slovenia *	2	15	26	11	15	7	7	11	7
Spain	14	12	16	21	13	8	7	4	4
Sweden	8	13	17	13	10	15	12	12	0
United Kingdom	5	15	11	11	11	8	8	10	21
2018 EUROPE-26	7	11	13	15	15	13	11	9	6
2016 EUR-27	8	13	15	15	13	11	10	8	6
2014 EUR-26	7	12	15	16	13	13	11	7	6
2012 EUR-25	9	15	16	14	13	12	10	6	4
2010 EUR-23	10	15	15	10	12	12	12	8	4
2008 EUR-17	9	14	19	13	13	14	10	5	2

* caution - small sample

CHART 1-12
POPULATION PYRAMID - ANALYSIS OF ARCHITECTS
BY AGE AND GENDER



|2| ARCHITECTURE - THE MARKET



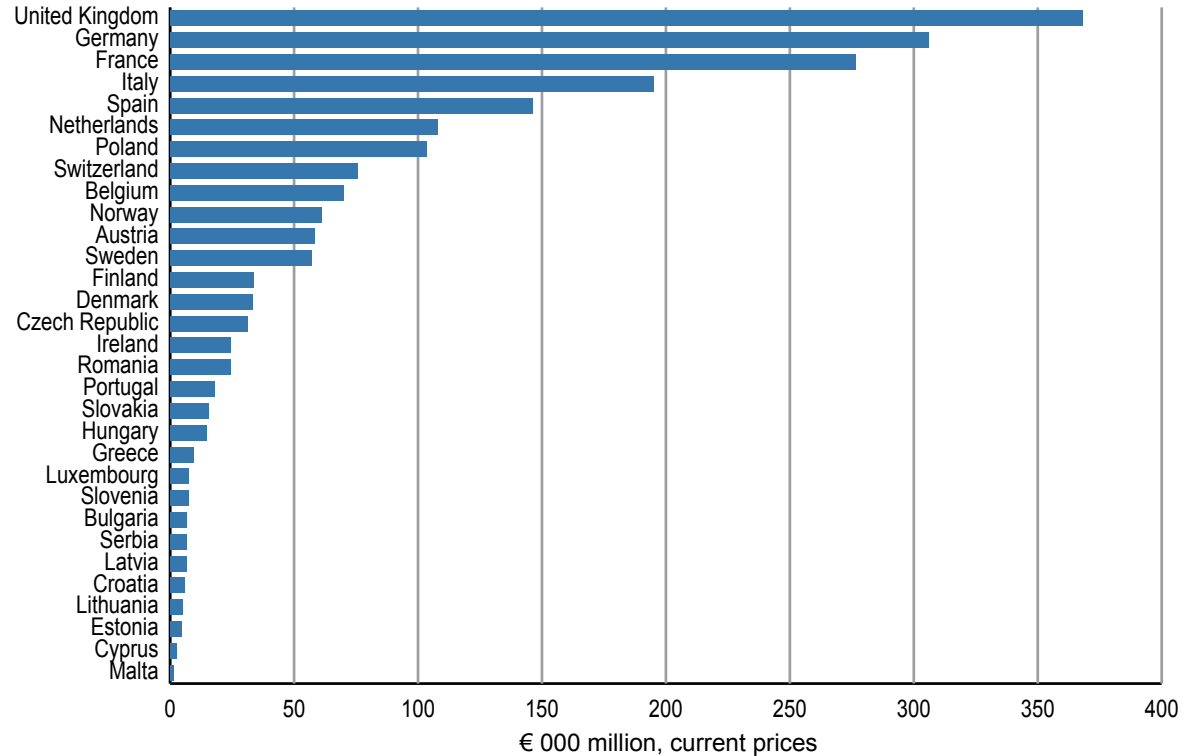
Aalto University Väre building
Place: Espoo (Finland)
Architect: Verstas Architects
Photo: Maurizio Tami

2.1 THE CONSTRUCTION MARKET IN EUROPE

The total value of the European construction market ('EUROPE - 31') is estimated to be worth €2,085 billion in 2018. This includes civil engineering and infrastructure work.

There are four countries - the UK, Germany, France and Italy - which together account for more than half of Europe's total construction output. Significant volumes of construction work are also recorded in Spain, the Netherlands and Poland. When measured per head of the general population, the highest values per head are recorded in Luxembourg and Norway.

CHART 2-1
ESTIMATED SIZE OF EUROPE CONSTRUCTION MARKET 2018



Base: all 31 European countries

Source: Mirza & Nacey estimates based on data sourced from Eurostat updated using the most recent Eurostat Construction Output Production Indices.



TABLE 2-1
SIZE OF CONSTRUCTION MARKET MILLIONS OF EUROS CURRENT PRICES

€ million	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017 *	2018 **
Austria	45 137	43 927	43 654	44 932	46 813	47 248	48 263	50 171	51 342	54 338	58 318
Belgium	58 141	58 062	59 531	66 014	65 947	65 253	66 685	67 913	71 325	68 495	69 845
Bulgaria	11 767	10 397	7 967	7 829	7 765	6 608	7 788	9 211	6 401	6 813	6 775
Croatia	10 397	8 810	6 845	6 413	5 886	5 561	5 378	5 473	5 794	5 826	6 046
Cyprus	5 280	4 152	3 930	3 374	2 786	2 041	1 832	1 890	1 993	2 544	2 490
Czech Republic	36 672	32 024	33 084	32 512	28 949	26 880	26 125	28 310	27 331	29 660	31 278
Denmark	32 470	27 244	25 679	27 394	27 622	27 472	28 434	29 504	31 320	32 782	33 425
Estonia	3 548	2 285	2 025	2 658	3 053	3 106	3 044	3 006	3 241	3 973	4 574
Finland	31 819	27 570	27 998	30 130	30 303	29 728	28 832	29 800	32 675	35 057	33 745
France	283 736	264 335	264 969	279 230	279 221	282 417	277 398	270 528	272 223	279 807	276 669
Germany	221 117	221 003	231 376	251 671	260 057	264 450	276 494	279 630	295 079	312 605	306 168
Greece	34 799	31 780	20 959	16 868	14 960	12 731	10 366	9 100	10 533	10 121	9 621
Hungary	11 892	10 296	9 160	8 672	7 945	8 806	9 852	10 246	9 473	12 220	14 655
Ireland	41 004	16 526	13 682	10 312	10 297	10 840	16 296	17 030	19 404	21 646	24 519
Italy	277 718	257 869	253 789	255 297	229 554	212 194	199 654	196 261	193 574	197 517	195 035
Latvia	7 883	4 456	3 589	4 505	4 835	5 108	5 427	5 215	4 280	4 949	6 518
Lithuania	6 353	3 070	2 754	3 408	3 333	3 782	4 424	4 320	3 981	4 243	4 984
Luxembourg	5 127	5 009	4 869	5 382	5 207	5 418	6 031	6 694	7 165	7 364	7 616
Malta	780	781	793	828	841	857	996	1 077	1 085	1 197	1 300
Netherlands	99 184	96 582	87 770	91 512	84 506	79 607	80 907	84 840	92 352	98 460	107 798
Norway	43 746	37 109	40 974	47 973	57 008	57 100	56 496	55 646	57 609	58 099	61 260
Poland	77 321	65 288	77 417	84 489	79 472	75 103	77 002	80 993	78 359	84 857	103 477
Portugal	33 674	30 992	30 333	27 104	20 763	18 284	16 878	17 015	17 036	17 019	17 832
Romania	34 195	28 589	30 652	28 722	30 276	28 011	23 587	27 510	27 681	24 297	24 414
Serbia	6 620	4 946	4 551	5 471	5 144	4 613	4 619	5 051	5 324	5 391	6 727
Slovakia	14 213	13 918	13 351	13 755	12 775	11 959	12 839	15 205	14 819	14 787	15 430
Slovenia	9 830	8 240	7 084	6 101	5 654	5 285	5 536	5 553	5 347	5 913	7 309
Spain	328 204	281 543	213 668	176 656	147 747	132 271	136 188	142 478	144 793	145 211	146 327
Sweden	40 263	33 516	39 956	43 729	44 906	45 418	46 639	49 285	52 489	57 979	57 032
Switzerland	39 386	42 078	48 032	57 474	60 352	60 829	63 391	72 426	71 016	72 513	75 721
United Kingdom	282 047	220 016	235 533	241 633	265 967	264 347	299 278	362 113	336 399	361 425	367 926
EUROPE - 31 (€ 000 million)	2 134	1 892	1 846	1 882	1 850	1 803	1 847	1 943	1 951	2 037	2 085

Source of all data: Eurostat National Accounts - output at current prices. Copyright © Eurostat. All Rights Reserved.

* Data for several countries 2017 (and Sweden 2016): Mirza & Nacey estimates derived from the most recent Eurostat Construction Output Production Indices.

** Data for 2018: Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices.

Construction output includes civil engineering and infrastructure work.



Construction output in Europe-31 is rising, but still remains lower than it was in 2008. The last two years have seen consistent growth in output, and the trend is clearly up. Output is rising in most countries, with the fastest growth between 2016 and 2018 recorded in Poland. It is a similar picture of growth for the majority of countries between 2017 and 2018, although in two of the largest - France and Germany - output is estimated to be slightly lower in 2018 than it was in 2017.

CHART 2-3
CHANGES IN CONSTRUCTION OUTPUT 2016 TO 2018

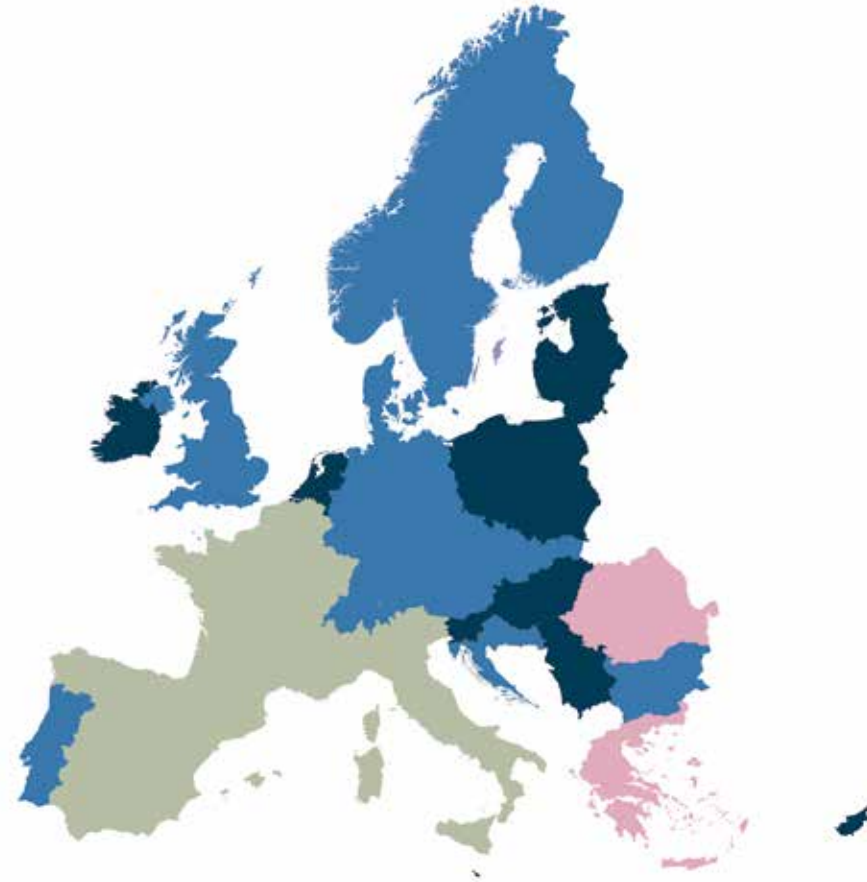
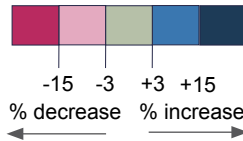
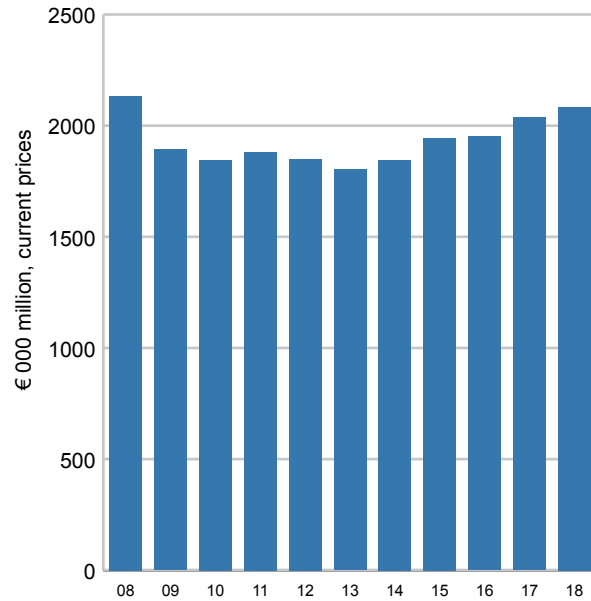


CHART 2-2
CHANGE IN CONSTRUCTION OUTPUT IN EUROPE-31 2008 TO 2018



Base for both map above and chart left: all 31 European countries
Source: Mirza & Nacey estimates based on data sourced from Eurostat updated using the most recent Eurostat Construction Output Production Indices.



TABLE 2-2
ESTIMATED SIZE OF CONSTRUCTION MARKET 2018 BY COUNTRY AND COMPARATIVE VALUES

	construction output (estimated € million)	population (number as at 01.01.2018)	construction output per head of population (€)	architects (estimated number)
Austria	58318	8822267	6610	5400
Belgium	69845	11413058	6120	14800
Bulgaria	6775	7050034	961	2000
Croatia	6046	4105493	1473	2200
Cyprus	2490	864236	2881	950
Czech Republic	31278	10610055	2948	8300
Denmark	33425	5781190	5782	10300
Estonia	4574	1319133	3467	800
Finland	33745	5513130	6121	3600
France	276669	67221943	4116	30000
Germany	306168	82850000	3695	111200
Greece	9621	10738868	896	18500
Hungary	14655	9778371	1499	4200
Ireland	24519	4838259	5068	2500
Italy	195035	60483973	3225	160000
Latvia	6518	1934379	3369	820
Lithuania	4984	2808901	1774	1400
Luxembourg	7616	602005	12651	950
Malta	1300	475701	2733	1006
Netherlands	107798	17118084	6297	10600
Norway	61260	5295619	11568	3825
Poland	103477	37976687	2725	14000
Portugal	17832	10291027	1733	23000
Romania	24414	19523621	1250	9900
Serbia	6727	7001444	961	8000
Slovakia	15430	5443120	2835	1730
Slovenia	7309	2066880	3536	1380
Spain	146327	46659302	3136	55700
Sweden	57032	10120242	5635	6750
Switzerland	75721	8482152	8927	7400
United Kingdom	367926	66238007	5555	41000
EUROPE - 31 - 2018	2084835	533427181	3908	562211

Source: Construction output and population data - Eurostat
Copyright © Eurostat. All Rights Reserved. Data for 2018
are Mirza & Nacey estimates based on most recent Eurostat
Construction Output Production Indices.

The total for EUROPE-31 is Mirza & Nacey estimate.

Construction output includes civil engineering and infrastructure
work.

2.2 THE ARCHITECTURAL MARKET IN EUROPE

Just as the construction market is expanding, so too is the architectural market. The market has now been rising for the past three surveys, and the pattern emerging is that the construction market moves relatively gradually while the architectural market is prone to rather more exaggerated moves. It is also evident that there is a lag between movement in construction and a corresponding

movement in the architectural market. The total value of the architectural market in Europe-31 is estimated to be €16.4 billion in 2018. This relates to the total turnover, or value of the revenue generated by the profession. Each individual country figure is an estimate and should be considered with caution. The estimate has been grossed-up from survey data (see Appendix I for methodology).

The largest architectural markets are Germany, the UK, Italy, France and the Netherlands. These five countries have consistently remained the five largest markets over the last ten years.

CHART 2-4
VALUE OF ARCHITECTURAL MARKET AVERAGE PER ARCHITECT

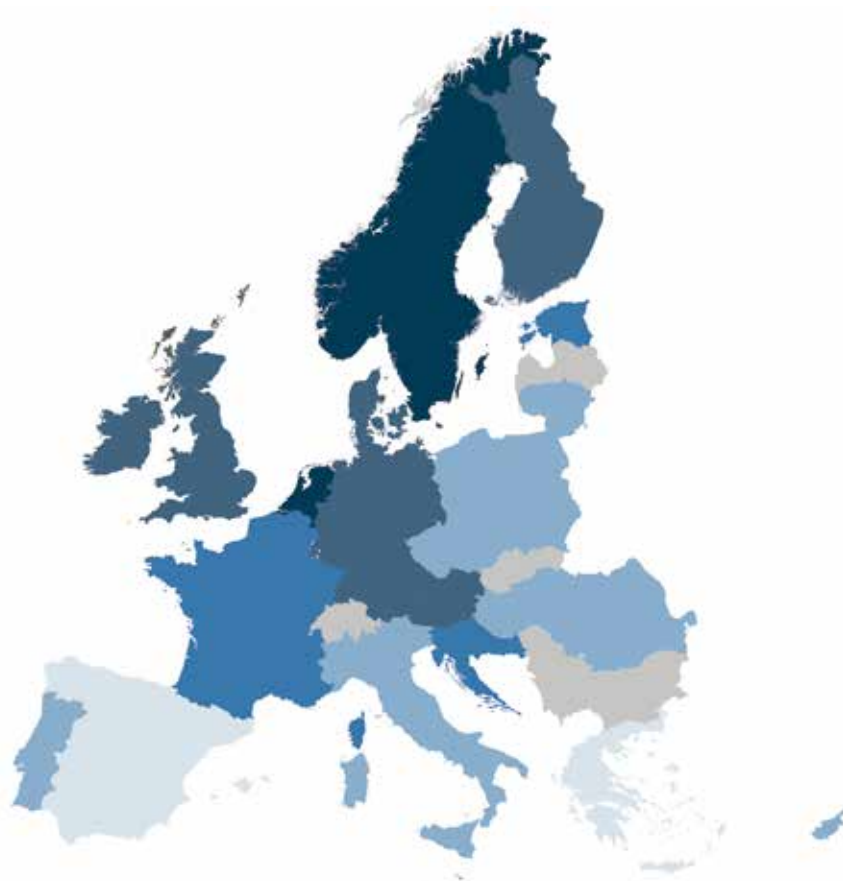
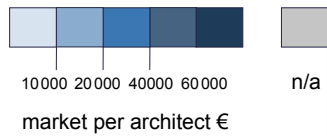
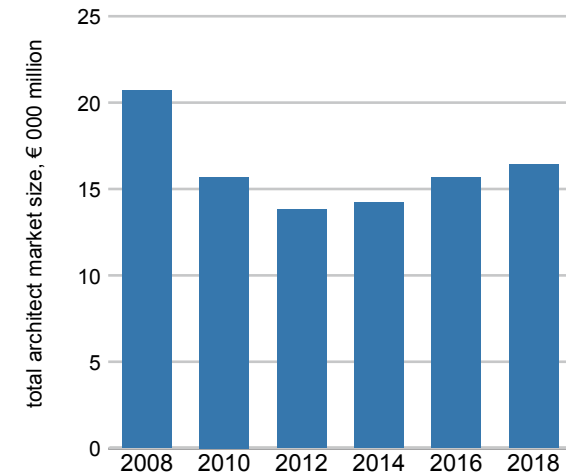


CHART 2-5
CHANGES 2008 TO 2018 IN ESTIMATED VALUE OF ARCHITECTURAL MARKET IN EUROPE-31



Base: all 31 European countries

Source: Mirza & Nacey estimates based on survey data

Note: The base 'EUROPE-31' is different from the base used for previous surveys. Figures for previous years have been recalculated using the 2018 base number of countries so will be different from estimates published in previous survey reports.



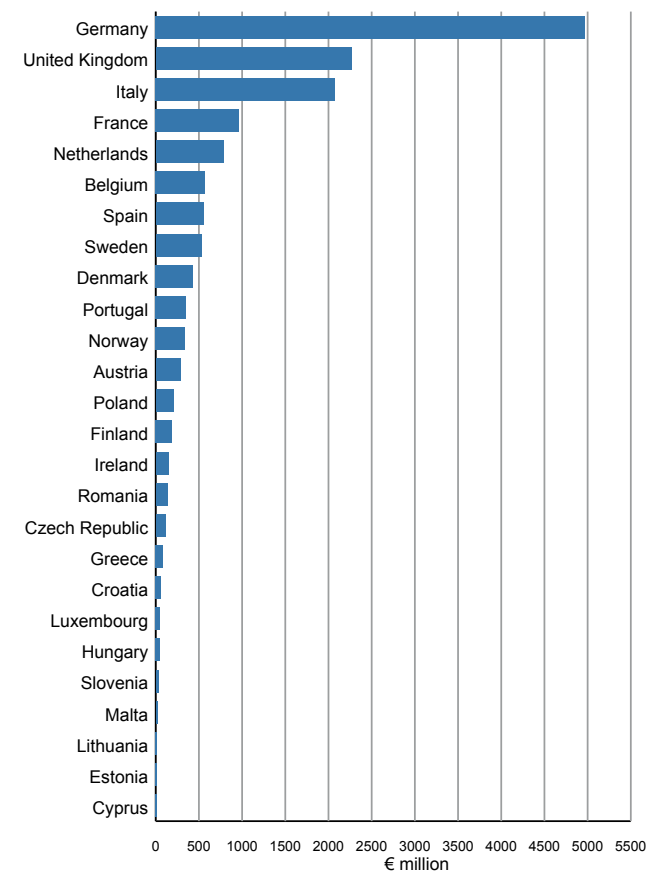
TABLE 2-3
ESTIMATED SIZE OF ARCHITECTURAL MARKET 2018 BY COUNTRY AND COMPARATIVE VALUES

	market size (€000s)	value per architect (€)	value per 1000 population (€)	architectural market as per cent construction	2016 market size (€000s)	2014 market size (€000s)	2012 market size (€000s)	2010 market size (€000s)	2008 market size (€000s)
Austria	287 174	53 180	32 551	0.49	279 307	281 241	262 774	256 292	296 789
Belgium	569 489	38 479	49 898	0.82	610 346	436 306	529 292	556 280	327 108
Croatia	59 602	27 092	14 518	0.99	54 841	44 798	50 235	64 290	n/a
Cyprus *	16 694	17 573	19 317	0.67	17 859	n/a	n/a	n/a	n/a
Czech Republic	112 931	13 606	10 644	0.36	92 210	139 458	153 433	73 045	n/a
Denmark	429 470	41 696	74 288	1.28	482 321	392 062	447 607	308 697	356 228
Estonia *	16 730	20 912	12 682	0.37	14 396	16 330	29 277	12 667	27 524
Finland	188 952	52 487	34 273	0.56	178 017	133 689	161 704	117 456	42 580
France	961 483	32 049	14 303	0.35	984 215	907 837	1 254 376	1 301 699	1 103 778
Germany	4 970 740	44 701	59 997	1.62	5 015 212	5 047 349	4 192 657	4 094 601	3 988 103
Greece	82 696	4 470	7 701	0.86	n/a	102 646	170 961	289 623	294 149
Hungary *	47 024	11 196	4 809	0.32	33 267	n/a	60 566	n/a	n/a
Ireland	149 498	59 799	30 899	0.61	110 600	90 682	112 102	172 362	408 855
Italy	2 072 306	12 952	34 262	1.06	1 758 087	1 916 761	2 775 280	2 708 910	n/a
Lithuania	16 850	12 036	5 999	0.34	10 641	n/a	9 676	11 455	n/a
Luxembourg *	49 588	52 198	82 372	0.65	68 308	49 361	38 264	n/a	31 828
Malta *	19 379	19 263	40 737	1.49	9 659	13 050	15 565	n/a	13 320
Netherlands	782 773	73 847	45 728	0.73	939 867	910 000	807 000	976 000	902 000
Norway	340 447	89 006	64 288	0.56	n/a	n/a	n/a	n/a	n/a
Poland *	208 042	14 860	5 478	0.20	212 481	n/a	210 575	258 803	n/a
Portugal	348 279	15 143	33 843	1.95	276 051	176 636	261 110	n/a	n/a
Romania	135 682	13 705	6 950	0.56	76 954	79 471	90 111	63 551	112 659
Slovenia *	30 396	22 026	14 706	0.42	35 700	24 874	42 110	10 359	40 501
Spain	555 550	9 974	11 907	0.38	461 124	332 999	336 420	n/a	n/a
Sweden	532 201	78 845	52 588	0.93	470 484	347 110	330 785	356 300	145 073
United Kingdom	2 265 051	55 245	34 196	0.62	2 169 202	1 978 835	2 006 403	1 955 929	2 800 042
2018 EUROPE-26	15 249 028	28 121	30 285	0.77					
2016 EUROPE-27	15 603 101	27 300	26 651	0.9	15 603 101				
2014 EUROPE-26	14 340 253	26 109	27 176	0.9		14 340 253			
2012 EUROPE-25	14 424 668	27 770	25 870	1.0			14 424 668		
2010 EUROPE-23	14 636 411	33 253	28 716	1.1				14 636 411	
2008 EUROPE-17	11 616 874	45 405	31 017	1.1					11 616 874

'Market size' refers to the architectural market as measured as the sum of the turnover earned by private architectural practices in each country. Data refers to 2017/18. The market size has been estimated see Appendix for an explanation of the methodology.

* caution - small sample

CHART 2-6
ESTIMATED VALUE OF ARCHITECTURAL MARKET



2.3 THE ARCHITECTURAL MARKET ANALYSED BY TYPE & SECTOR

Refurbishment is more important, overall, for architects than new build. Refurbishment accounts for 59 per cent of work, new build for 41 per cent. This is exactly the same split as was recorded in the previous survey. Refurbishment work is not universally dominant - in more than half of the countries, new build accounts for more than 50 per cent of all work. The importance of refurbishment is slightly inflated by Italy, where refurbishment work accounts for 78 per cent of all work. Poland stands out as having a particularly large volume of new build work; 86 per cent.

The largest building sector, by quite some margin, is private housing. And within private housing, work to individual houses dominates. More than one third of architects' total work (36 per cent) relates to individual houses, and another 18 per cent is other private housing. Private housing is the most important sector in every country, and in sixteen out of the 27 countries it accounts for more than half of all work. By contrast, in Finland and Sweden this sector is much less important, accounting for less than 15 per cent of work. Commercial, other private and mixed projects account for 30 per cent of architects' work, which varies less between the countries although is highest in Estonia and Sweden (over 40 per cent) and lowest in Belgium (14 per cent).

Health, education, public housing and other public represents 17 per cent of architects' work. It is more than twice this proportion in Finland, Denmark and, due to a high volume of public housing, Austria. The lowest proportion of public sector work is reported by architects in Spain, Portugal and Cyprus.

TABLE 2-4
PROPORTION OF WORK UNDERTAKEN
BY BUILDING TYPE ANALYSED BY COUNTRY

per cent	new build	refurbishment
Austria	57	43
Belgium	43	57
Croatia	56	44
Cyprus *	77	23
Czech Republic	54	46
Denmark	43	57
Estonia *	70	30
Finland	58	42
France	43	57
Germany	46	54
Greece	37	63
Hungary *	64	36
Ireland	49	51
Italy	22	78
Lithuania	68	32
Luxembourg *	57	43
Malta *	57	43
Netherlands	53	47
Norway	65	35
Poland *	86	14
Portugal	42	58
Romania	64	36
Slovenia *	57	43
Spain	48	52
Sweden	57	43
United Kingdom	41	59
2018 EUROPE-26	41	59
<i>2016 EUROPE-27</i>	<i>41</i>	<i>59</i>
<i>2014 EUROPE-26</i>	<i>37</i>	<i>63</i>
<i>2012 EUROPE-25</i>	<i>n/a</i>	<i>n/a</i>
<i>2010 EUROPE-23</i>	<i>n/a</i>	<i>n/a</i>
<i>2008 EUROPE-17</i>	<i>n/a</i>	<i>n/a</i>

* caution - small sample

TABLE 2-5
MARKET SHARE AND INVOLVEMENT
BY BUILDING SECTOR

per cent	per cent of market	per cent of practices involved
private housing	54	88
offices	8	34
retail	5	21
leisure and the arts	4	15
industrial	6	23
health	3	12
education	6	20
public housing	3	12
other private	8	29
other public	4	13

involved = have worked on at least one job in this sector in year

CHART 2-7
PROPORTION OF MARKET BY BUILDING SECTOR

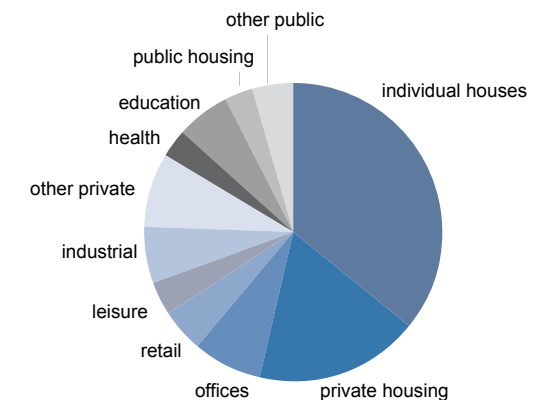


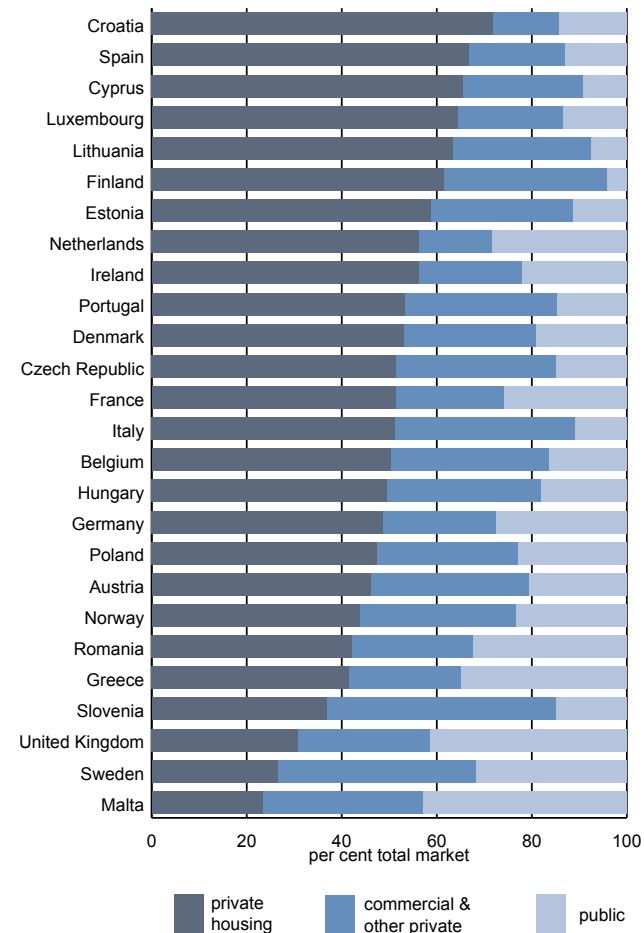


TABLE 2-6
PROPORTION OF WORK UNDERTAKEN BY BUILDING SECTOR ANALYSED BY COUNTRY

per cent	individual houses extensions loft conversions	private housing	offices	retail	leisure	industrial	health	education	public housing	other private	other public	TOTAL
Austria	29	12	7	4	2	5	4	9	14	5	7	100
Belgium	55	17	3	3	1	4	2	5	4	2	4	100
Croatia	36	17	8	1	4	5	2	5	2	10	11	100
Cyprus *	45	16	11	11	10	1	1	1	0	1	2	100
Czech Republic	29	15	9	4	7	9	2	7	2	4	12	100
Denmark	17	14	8	1	4	5	5	5	6	10	26	100
Estonia *	26	11	14	8	7	10	5	0	7	9	3	100
Finland	14	10	12	7	5	4	6	13	10	7	13	100
France	35	16	6	5	3	4	3	7	7	5	8	100
Germany	30	22	11	3	5	7	4	9	2	8	0	100
Greece	56	11	4	3	2	3	1	5	1	8	6	100
Hungary *	29	19	4	1	8	12	6	8	3	4	7	100
Ireland	43	13	6	5	2	3	5	9	6	6	2	100
Italy	42	17	5	7	2	5	1	2	1	11	7	100
Lithuania	30	16	11	4	6	6	3	5	3	6	9	100
Luxembourg *	40	16	8	3	2	1	3	10	8	1	7	100
Malta *	32	18	15	2	0	2	1	1	0	13	15	100
Netherlands	38	11	4	3	4	6	5	5	8	7	10	100
Norway	24	18	7	3	5	8	10	10	3	3	9	100
Poland *	31	22	8	0	0	8	0	3	4	16	8	100
Portugal	52	12	4	9	4	5	2	2	1	7	3	100
Romania	38	12	5	6	3	11	3	5	5	8	3	100
Slovenia *	44	7	17	5	3	11	1	3	1	3	6	100
Spain	51	14	6	8	1	4	2	3	1	6	4	100
Sweden	13	14	16	7	7	4	5	8	10	8	8	100
United Kingdom	49	16	5	4	5	3	2	5	2	6	4	100
2018 EUROPE-26	36	18	8	5	4	6	3	6	3	8	4	100
2016 EUROPE-27	39	16	7	7	4	5	3	4	2	9	6	100
2014 EUROPE-26	40	13	6	6	3	6	3	5	3	7	9	100
2012 EUROPE-25	42	9	6	6	3	5	2	4	3	9	11	100
2010 EUROPE-23	30	14	8	5	4	6	4	6	6	7	10	100
2008 EUROPE-17	31	14	10	5	3	8	4	6	4	7	10	100

* caution - small sample

CHART 2-8
PROPORTION OF WORK UNDERTAKEN IN EACH MAIN BUILDING SECTOR RANKED IN ORDER OF HIGHEST PRIVATE HOUSING WORK



2.4 THE ARCHITECTURAL MARKET ANALYSED BY TYPE OF CLIENT

Just over half of architects' work is for Individual clients, a proportion which has been increasing steadily since 2010. Public sector clients account for 17 per cent of work, similar to the level recorded in the last three surveys but lower than in 2008 and 2010. Fifteen per cent of clients are limited companies or PLCs, while 10 per cent of work is generated by developers.

CHART 2-9
PROPORTION OF MARKET BY CLIENT TYPE

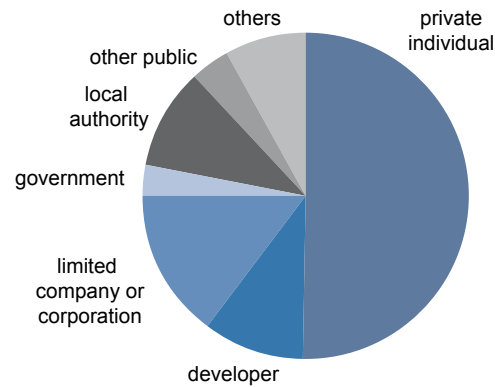


TABLE 2-7
MARKET SHARE AND INVOLVEMENT
BY CLIENT TYPE

per cent	per cent of market	per cent of practices involved
individuals	51	87
developer	10	30
limited company / PLC	15	38
central government	3	8
local government	10	27
other public	4	12
other private	8	22

involved = have worked for at least one of these clients in year

TABLE 2-8
PROPORTION OF WORK UNDERTAKEN FOR DIFFERENT CLIENTS ANALYSED BY COUNTRY

per cent	individuals	developer	limited company or corporation (PLC)	central government	local government	other public	other private	TOTAL
Austria	42	12	17	14	9	3	4	100
Belgium	61	12	11	2	6	7	3	100
Croatia	44	3	27	2	14	6	4	100
Cyprus *	60	16	16	2	4	0	1	100
Czech Republic	41	15	12	2	21	6	3	100
Denmark	21	18	12	13	19	10	8	100
Estonia *	30	27	36	0	3	4	0	100
Finland	17	17	28	6	14	17	2	100
France	44	13	12	1	10	14	7	100
Germany	48	9	17	4	14	0	9	100
Greece	73	8	7	2	5	2	6	100
Hungary *	38	13	27	5	17	0	5	100
Ireland	47	18	12	7	7	7	4	100
Italy	60	8	13	1	4	6	9	100
Lithuania	41	8	32	5	8	4	3	100
Luxembourg *	37	28	8	6	16	4	1	100
Malta *	40	25	16	4	0	1	14	100
Netherlands	41	20	13	2	7	8	9	100
Norway	28	25	10	6	19	8	4	100
Poland *	43	22	24	0	11	0	0	100
Portugal	55	13	20	1	4	4	3	100
Romania	49	14	25	1	5	4	4	100
Slovenia *	47	3	31	2	9	3	4	100
Spain	63	12	12	0	9	4	2	100
Sweden	22	21	25	4	15	11	1	100
United Kingdom	50	20	10	2	4	7	8	100
2018 EUR-26	51	10	15	3	10	4	8	100
2016 EUR-27	52	10	15	3	8	6	7	100
2014 EUR-26	50	8	18	4	8	6	6	100
2012 EUR-25	45	11	19	2	8	8	6	100
2010 EUR-23	41	12	18	4	10	9	6	100
2008 EUR-17	47	10	14	6	9	7	7	100

* caution - small sample

2.5 THE ARCHITECTURAL MARKET ANALYSED BY TYPE OF SERVICE

Two thirds of architects' work relate to building design; this is the most important type of service offered by architects in every country. In most countries, building design accounts for at least 60 per cent of work, but in Italy and Malta it is a substantially lower proportion - although still the most important service type offered.

Of the other service types, only interior design is significant. Ten per cent of work relates to interior design - double this proportion in Italy and Greece. Less than 5 per cent of architects' work in Europe relates to other service types. In Sweden, 10 per cent of work is planning; over 10 per cent of work in Malta and Lithuania relate to project management; and over 10 per cent of work in Denmark is landscape design.

CHART 2-10
PROPORTION OF MARKET BY TYPE OF SERVICE

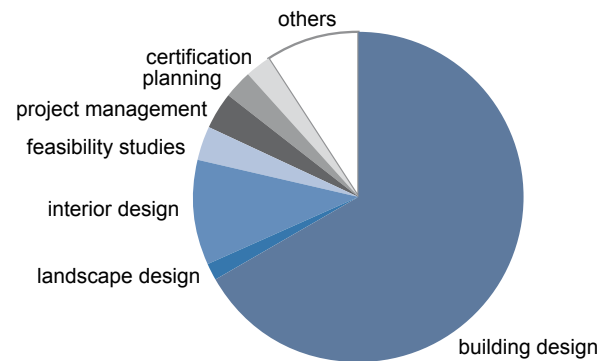


TABLE 2-9
PROPORTION OF WORK UNDERTAKEN BY EACH SERVICE TYPE

per cent	building design	landscape design	interior design	feasibility studies	project management	planning	certification	property valuation	other service	TOTAL
Austria	75	2	4	5	3	2	3	1	4	100
Belgium	78	1	7	4	6	0	0	0	4	100
Croatia	65	4	10	0	3	5	3	0	9	100
Cyprus *	76	3	14	1	4	1	0	1	0	100
Czech Republic	58	9	13	1	3	11	0	0	4	100
Denmark	47	12	6	3	8	6	1	1	16	100
Estonia *	73	2	13	0	7	2	2	0	0	100
Finland	71	1	6	1	3	9	0	0	8	100
France	71	1	9	7	4	3	0	0	5	100
Germany	86	1	4	0	1	1	2	1	4	100
Greece	48	4	20	2	6	1	3	3	14	100
Hungary *	65	6	7	3	1	0	8	0	10	100
Ireland	71	2	5	5	3	2	4	0	9	100
Italy	41	3	21	5	6	3	4	5	13	100
Lithuania	55	7	12	3	12	9	0	0	2	100
Luxembourg *	63	2	5	6	10	7	5	1	3	100
Malta *	32	2	15	4	19	3	3	9	14	100
Netherlands	63	2	10	7	8	2	0	0	8	100
Norway	68	5	5	8	5	7	1	0	2	100
Poland *	92	0	0	3	2	3	0	0	0	100
Portugal	60	1	12	4	5	6	4	1	7	100
Romania	66	2	11	6	4	7	1	0	3	100
Slovenia *	62	3	10	7	10	6	0	1	2	100
Spain	66	1	6	1	3	4	10	3	7	100
Sweden	64	1	9	5	1	12	1	0	5	100
United Kingdom	65	1	5	7	7	2	2	0	12	100
2018 EUR-26	67	2	10	3	4	3	2	2	7	100
2016 EUR-27	62	2	11	3	4	3	3	2	9	100
2014 EUR-26	57	3	11	4	5	4	4	2	11	100
2012 EUR-25	50	2	14	6	7	6	n/a	n/a	16	100
2010 EUR-23	69	2	8	4	6	7	n/a	n/a	4	100
2008 EUR-17	66	3	9	3	5	4	n/a	n/a	9	100

* caution - small sample

2.6 FUTURE PROSPECTS

Architects' confidence in future prospects for work in the coming year, 2019, is currently high. The chart below plots how confidence has changed over the past ten years, and the latest 'balance' figure - the difference between the optimists and the pessimists - is +17.

At least half of architects in Malta, Ireland and Luxembourg expect workloads to rise in 2019 and it is these three countries, together with Norway, which score the highest positive 'balance' figures.

The 'balance' figure is negative in only three out of the 26 countries this year. These are Finland, the Czech Republic and Italy. In Finland and Italy, as well as the United Kingdom, at least 20 per cent of respondents expect workloads to fall in 2019.

CHART 2-11
CHANGE IN WORKLOAD PREDICTIONS
(BALANCE FIGURE).
ALL SURVEY COUNTRIES 2008 TO 2018 SURVEYS
(workload predictions made in survey year
for the following year)

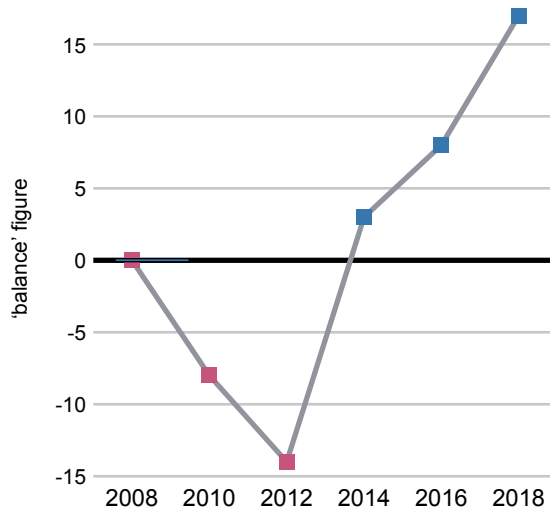
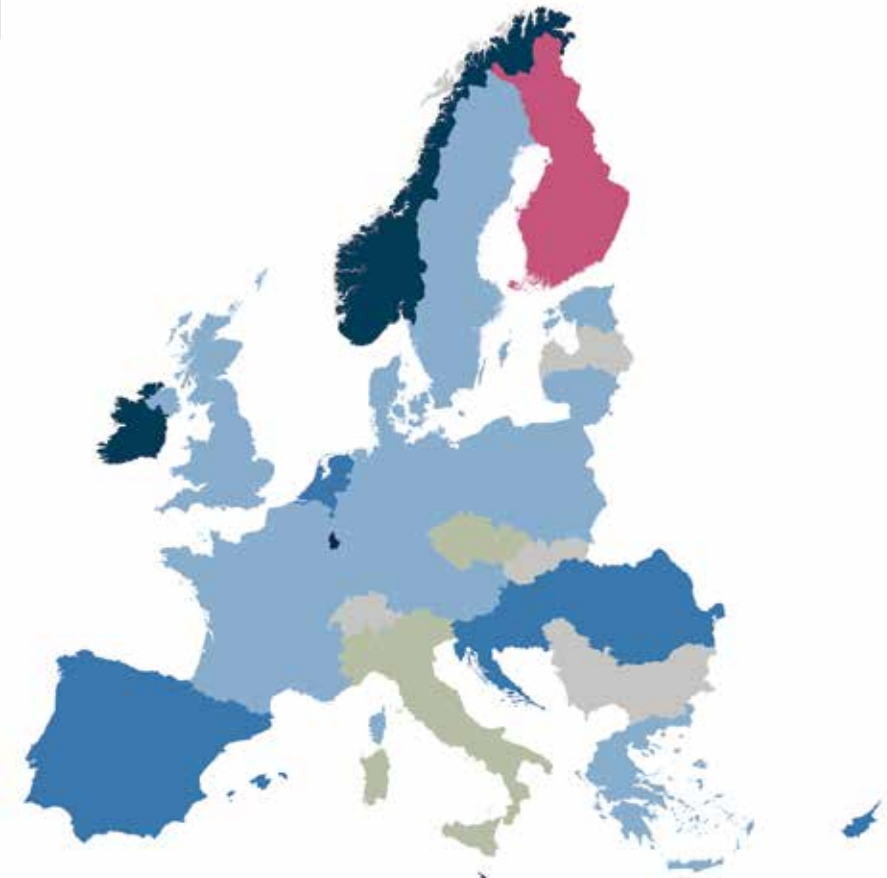
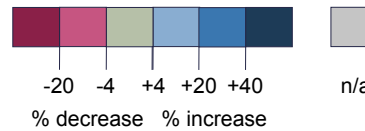


CHART 2-12
WORKLOAD PREDICTIONS FOR 2019



The 'balance' statistic is calculated by subtracting the per cent of respondents who predict workloads will fall from those who predict a rise



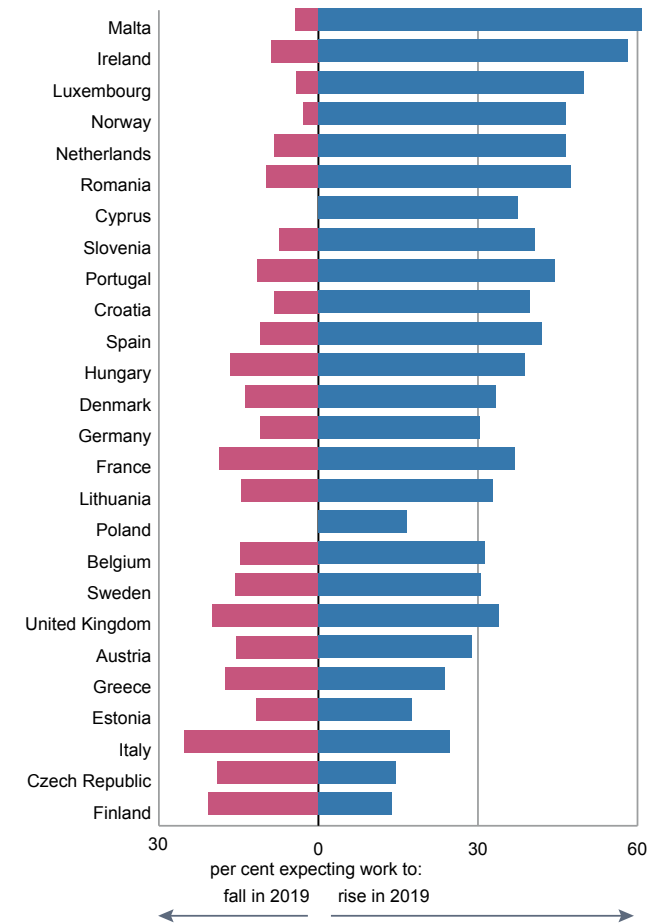
TABLE 2-10
FUTURE WORKLOAD PROSPECTS FOR 2019 ANALYSED BY COUNTRY

per cent	per cent of Principals who expect their practice workloads to change over the coming 12 months			balance**
	rise	no change	fall	
Austria	29	56	15	+13
Belgium	31	54	15	+17
Croatia	40	52	8	+31
Cyprus *	38	63	0	+38
Czech Republic	15	66	19	-4
Denmark	33	53	14	+19
Estonia *	18	71	12	+6
Finland	14	66	21	-7
France	37	44	19	+18
Germany	30	59	11	+19
Greece	24	59	18	+6
Hungary *	39	44	17	+22
Ireland	58	33	9	+49
Italy	25	50	25	-1
Lithuania	33	53	15	+18
Luxembourg *	50	46	4	+46
Malta *	61	35	4	+57
Netherlands	47	45	8	+38
Norway	46	51	3	+44
Poland *	17	83	0	+17
Portugal	44	44	12	+33
Romania	48	43	10	+38
Slovenia *	41	52	7	+33
Spain	42	47	11	+31
Sweden	31	54	16	+15
United Kingdom	34	46	20	+14
2018 EUROPE-26	32	53	15	+17
2016 EUROPE-27	31	46	23	+8
2014 EUROPE-26	28	47	25	+3
2012 EUROPE-25	21	43	35	-14
2010 EUROPE-23	24	44	32	-8
2008 EUROPE-17	28	45	28	0

* caution - small sample

** 'balance' statistic is calculated by subtracting the per cent of respondents who predict workloads will fall from those who predict a rise

CHART 2-13
FUTURE WORKLOAD PROSPECTS FOR 2019



Countries ranked in order of the 'balance' statistic. The difference between the bars above and 100% = per cent expecting 'no change'.

131 ARCHITECTURE - THE PRACTICE



Elevator
Place: Pfaffenthal (Luxembourg)
Architect: STDN STEINMETZDEMEYER
architectes urbanistes
Photo: Bohumil Kostohryz

3.1 PROFILE OF ARCHITECTURAL PRACTICES

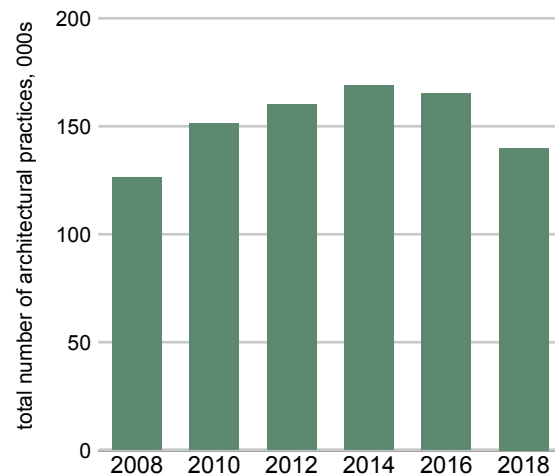
There are fewer architectural practices in Europe than in previous years. The number of private architectural practices in EUROPE-26 is estimated to be 134 000 and grossing this figure up to reflect all 31 European countries produces an estimate of 140 000 private architectural practices in Europe. This year's decline in the number of practices reflects a shift of the profession's employment away from one or two person practices towards medium and large ones.

It is a cyclical move; as the profession moves into a more positive economic climate, many of the architects who established one or two person practices during the economic crisis have either grown their practices or moved into larger practices. There are estimated to be substantially fewer practices in Denmark, Finland, Germany and Italy compared with the previous survey in 2016.

The information in this section is based on the questionnaires completed by Principals. These include Sole Principals, Freelancers and Partners & Directors in Private Practice.

The number of practices has been estimated by creating a model and then inserting data from the survey. The model is described in Appendix I

CHART 3-1
CHANGE IN ESTIMATED NUMBER OF PRACTICES IN EUROPE-31 2008 TO 2018



Note: The base 'EUROPE-31' is different from the base used for previous surveys. Figures for previous years have been recalculated using the 2018 base number of countries so will be different from estimates published in previous survey reports.

CHART 3-2
AVERAGE SIZE OF ARCHITECTURAL PRACTICES

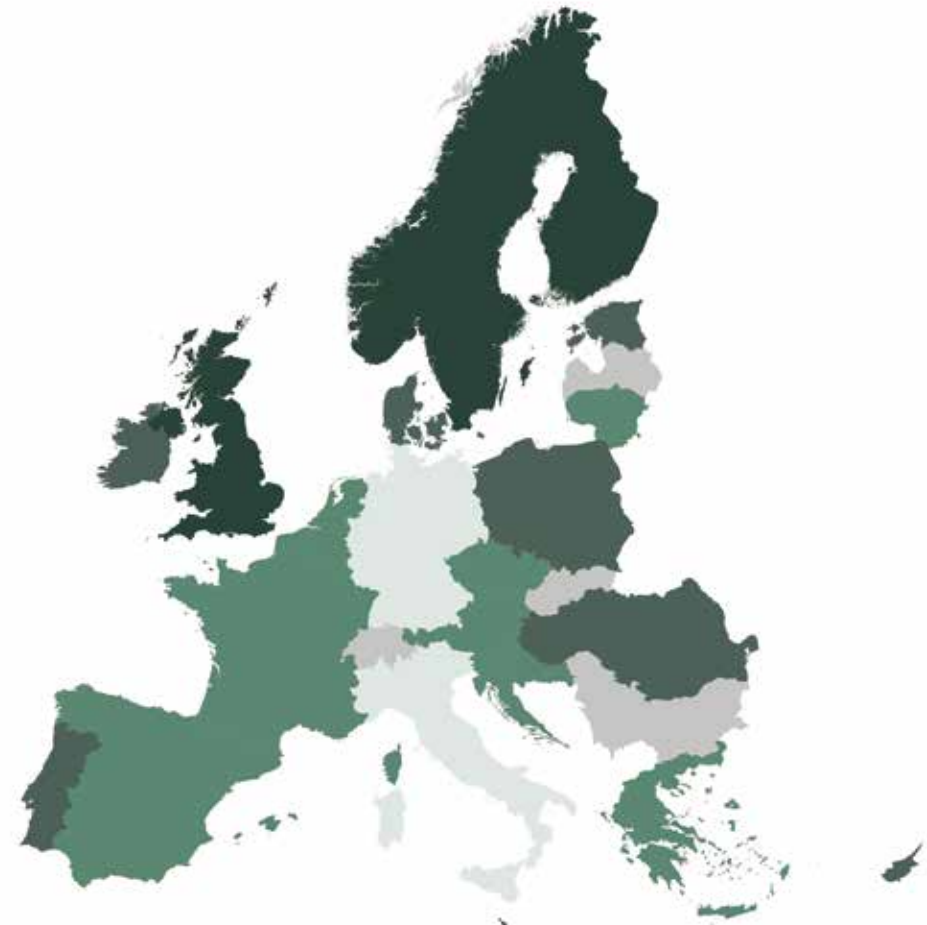


TABLE 3-1
ESTIMATED NUMBER AND SIZE OF ARCHITECTURAL PRACTICES

number (estimate)	size of architectural practice (number of architectural staff)							TOTAL
	1 staff	2 staff	3 to 5 staff	6 to 10 staff	11 to 30 staff	31 to 50 staff	over 50 staff	
Austria	1098	333	279	93	26	1	0	1831
Belgium	3263	465	436	159	43	21	2	4389
Croatia	360	143	140	40	14	0	1	698
Cyprus *	67	50	90	9	8	0	0	225
Czech Republic	885	154	334	97	47	4	1	1524
Denmark	919	123	106	44	58	12	9	1271
Estonia *	75	25	41	14	6	0	0	161
Finland	151	53	57	35	31	6	4	336
France	5537	1456	777	194	59	7	2	8033
Germany	26970	3560	2167	561	173	8	1	33440
Greece	3568	988	548	118	89	10	4	5325
Hungary *	409	185	168	71	30	5	1	869
Ireland	389	91	91	26	33	4	2	636
Italy	32633	4237	3245	781	291	31	23	41242
Lithuania	181	59	84	26	8	2	0	359
Luxembourg *	168	23	49	16	9	1	0	268
Malta *	48	39	27	27	6	3	0	150
Netherlands	2136	673	411	115	70	11	12	3428
Norway	344	45	121	52	62	3	4	630
Poland *	2085	661	1075	179	138	0	7	4146
Portugal	1706	570	763	198	91	16	11	3356
Romania	888	737	584	147	44	4	2	2407
Slovenia *	220	60	81	22	3	0	1	386
Spain	5312	2371	2006	586	57	4	2	10337
Sweden	705	141	112	59	41	8	11	1076
United Kingdom	4407	981	1268	445	305	70	39	7515
2018 EUR-26	94526	18227	15060	4112	1746	230	139	134038
per cent of practices	71	14	11	3	1	<1	<1	100
2016 EUR-27	114247	21319	16706	4243	1516	202	108	158342
2014 EUR-26	120242	22423	16066	3151	1069	100	30	163078
2012 EUR-25	98193	28134	22663	5247	1305	151	35	155725
2010 EUR-23	86049	19477	18963	5814	1973	279	83	132643
2008 EUR-17	37369	13489	10868	5318	2014	449	344	69851

'architectural staff' includes principals partners & directors; associates; salaried architects; technical staff; permanent and freelance.

* caution - small sample

Row or column totals may not add precisely due to rounding.

CHART 3-3
PRACTICES ANALYSED BY SIZE

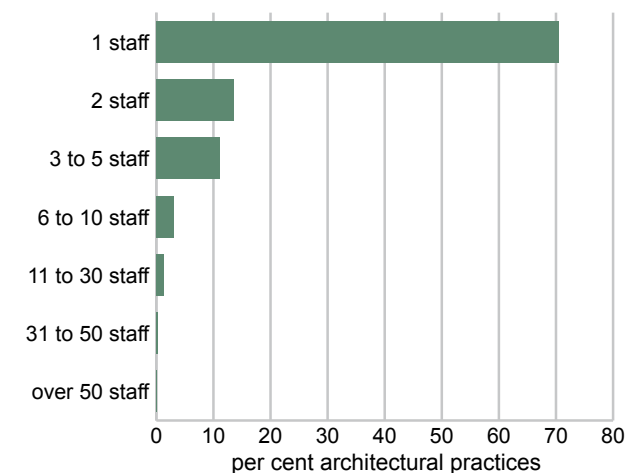
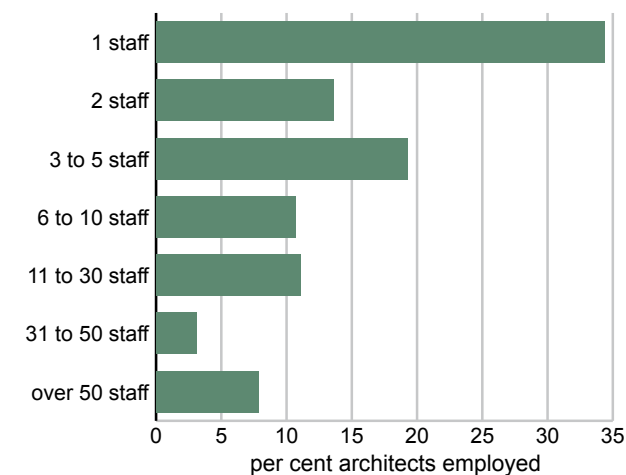


CHART 3-4
PROPORTION OF ARCHITECTS EMPLOYED IN PRACTICES OF DIFFERENT SIZES



3.2 LEGAL FORMATION OF PRACTICES

Well over half of architectural practices consider themselves to be “independent architects”, working on their own. This is the main form of architectural business in many countries; more than 80 per cent of practices in Italy and Greece are “independent architects”, and more than 60 per cent in Germany, Malta and Spain.

The next most popular legal formation of a practice is a Limited Company, accounting for 20 per cent of all practices across Europe but more than 50 per cent of practices in Croatia, Hungary, Poland and Romania. Seven per cent of practices are partnerships, and 2 per cent are PLCs including substantial proportions in Finland, Norway and Luxembourg.

CHART 3-5

PROPORTION OF ARCHITECTURAL PRACTICES THAT ARE LIMITED COMPANIES / PLCS / CORPORATIONS

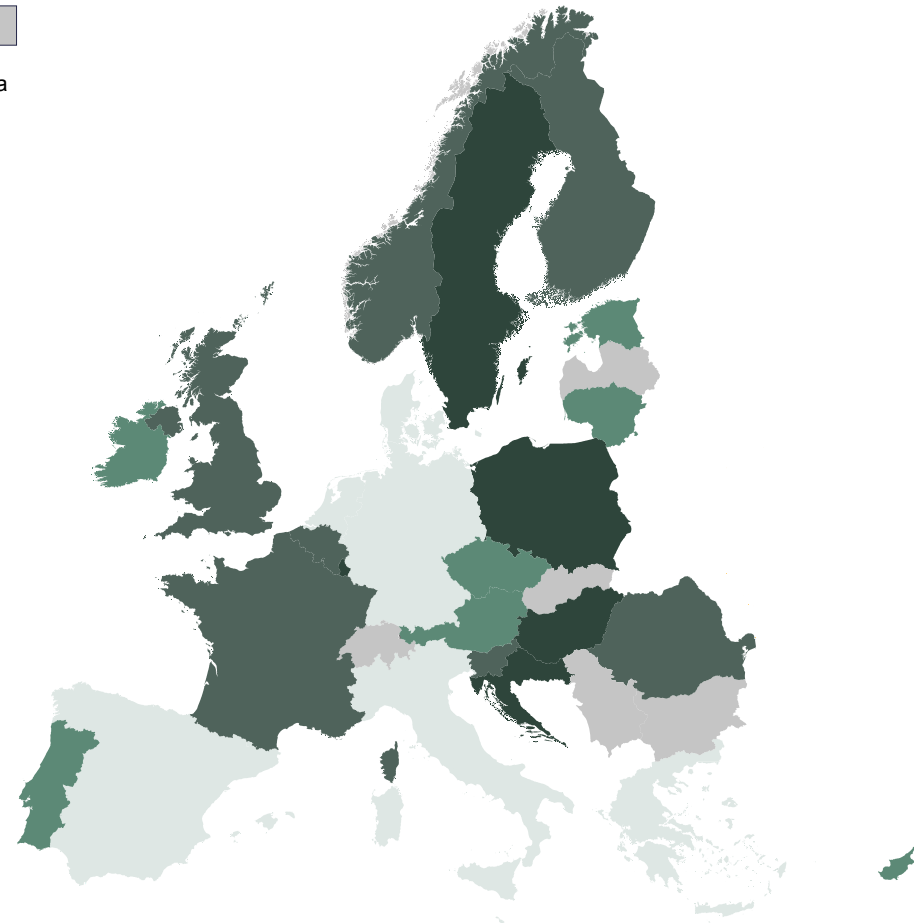
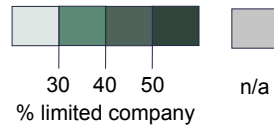
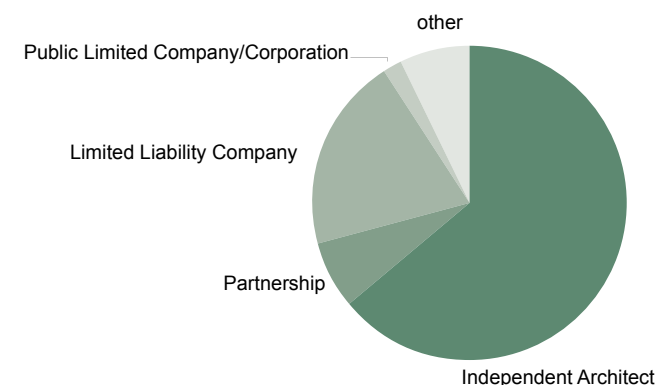


TABLE 3-2
LEGAL FORMATION OF ARCHITECTURAL PRACTICES - BASED ON TYPE OF PRACTICE
IN WHICH PRINCIPALS WORK

per cent	independent architect	partnership	limited company	PLC (public limited company) / corporation	other
Austria	56	6	36	0	1
Belgium	49	7	43	0	1
Croatia	17	11	70	2	0
Cyprus *	38	25	25	0	13
Czech Republic	29	23	34	1	13
Denmark	46	22	14	11	8
Estonia *	47	18	24	6	6
Finland	26	5	2	64	3
France	51	1	39	8	1
Germany	68	10	10	0	11
Greece	89	3	2	3	2
Hungary *	22	0	78	0	0
Ireland	40	18	41	1	0
Italy	89	5	3	0	3
Lithuania	45	19	32	0	4
Luxembourg *	24	8	44	24	0
Malta *	68	9	18	0	5
Netherlands	60	22	17	0	1
Norway	13	23	29	29	6
Poland *	17	0	67	0	17
Portugal	56	5	34	3	3
Romania	33	5	57	2	4
Slovenia *	50	0	50	0	0
Spain	61	3	18	0	18
Sweden	8	4	81	3	4
United Kingdom	38	7	41	6	8
2018 EUROPE-26	64	7	20	2	7
2016 EUROPE-27	52	10	36	2	0
2014 EUROPE-26	65	9	21	4	1
2012 EUROPE-25	67	9	21	2	1
2010 EUROPE-23	51	10	31	5	2
2008 EUROPE-17	52	18	22	4	3

* caution - small sample

CHART 3-6
TYPE OF ARCHITECTURAL BUSINESSES





3.3 PRACTICE TURNOVER

Turnover relates to the revenue earned by practices, measured before tax. The average turnover per practice rises in line with practice size, close to doubling with every practice size interval except for the very largest. This pattern is consistent with previous surveys. There is less information for the largest practice size groups due to smaller sample sizes and there is also more variation within this size group.

Compared with the previous survey, average practice turnover has increased in all but one size group. This is, in part, due to different countries being included in the survey response. Nevertheless, average practice turnover is higher in 2018 than in 2016 for most size groups in most countries.

TABLE 3-3
AVERAGE TURNOVER PER PRACTICE ANALYSED BY COUNTRY AND PRACTICE SIZE
TURNOVER EXCLUDES VAT

€	average (mean) turnover: size of practice (number of architectural staff)						
	1	2	3 to 5	6 to 10	11 to 30	31 to 50	51+
Austria	71 699	132 203	257 476	519 913	1 473 599	n/a	n/a
Belgium	65 421	119 917	194 178	n/a	n/a	n/a	n/a
Croatia	27 440	56 610	93 273	523 748	807 589	n/a	n/a
Cyprus *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Czech Republic	52 546	n/a	69 067	156 584	374 851	n/a	n/a
Denmark	87 977	n/a	n/a	n/a	n/a	n/a	n/a
Estonia *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	85 000	n/a	202 857	600 778	1 764 166	2 630 000	n/a
France	61 027	117 254	240 252	696 475	1 568 470	2 783 809	7 843 000
Germany	99 258	181 955	385 096	786 041	1 922 682	3 525 879	7 073 608
Greece	13 094	18 833	19 500	n/a	n/a	n/a	n/a
Hungary *	n/a	30 442	n/a	n/a	n/a	n/a	n/a
Ireland	62 885	206 000	194 100	463 134	1 298 355	n/a	n/a
Italy	37 236	51 843	88 275	139 833	424 211	2 345 909	14 353 647
Lithuania	22 500	25 106	45 644	119 063	n/a	n/a	n/a
Luxembourg *	53 089	n/a	n/a	n/a	n/a	n/a	n/a
Malta *	n/a	56 230	166 000	n/a	n/a	n/a	n/a
Netherlands	67 325	105 581	240 111	531 529	1 254 272	n/a	n/a
Norway	203 180	n/a	n/a	881 951	1 548 957	n/a	n/a
Poland *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Portugal	19 034	32 997	78 567	183 540	742 857	n/a	n/a
Romania	13 406	20 816	51 966	887 162	830 384	n/a	n/a
Slovenia *	23 750	n/a	n/a	168 750	n/a	n/a	n/a
Spain	29 243	47 953	76 825	n/a	n/a	n/a	n/a
Sweden	85 208	156 525	290 849	630 058	1 537 293	n/a	26 528 120
United Kingdom	56 075	108 955	214 292	464 416	1 780 425	n/a	n/a
2018 EUR-26	66 180	115 601	228 107	554 285	1 364 204	2 555 257	18 655 138
2016 EUR-27	48 025	117 358	218 397	551 141	1 758 965	5 710 433	12 133 689
2014 EUR-26	40 646	87 651	169 450	520 474	1 743 964	9 309 970	15 570 115
2012 EUR-25	41 755	78 648	166 607	437 493	1 397 166	3 626 922	16 538 301
2010 EUR-23	48 295	93 826	192 685	463 320	1 167 050	3 471 360	10 613 801
2008 EUR-17	59 389	117 827	201 693	498 563	1 282 563	3 156 907	4 563 556

* caution - small sample

Figures are averages (means) and refer to the 12 months ending 01 May 2018 or the year 2017/18 or latest accounting year.

Figures are unadjusted for PPP.

Turnover excludes VAT.

The minimum number of responses to give a reliable answer is 10. But for smaller countries we have extended this to 5 and in very exceptional cases to 4. Where there are fewer than four responses or where the figure varies excessively from the mean we mark the data as n/a.

3.4 HOW PRACTICES CHARGE FOR THEIR SERVICES

Around a third of fees for jobs are calculated as a per cent of their contract value. This method of calculating fees is used on more than 50 per cent of jobs in France, Luxembourg, Hungary, Austria, Spain, Belgium and Cyprus. The next most common method is a lump sum, used on 28 per cent of jobs. This method is particularly common in Greece, the Netherlands and Cyprus. An hourly charge is used for calculating the fees on 13 per cent of jobs, including more than 40 per cent of jobs in Sweden, Finland and Norway. A quarter of all work is charged using "other" methods, including in Germany the HOAI. Relatively few jobs are undertaken at risk, 3 per cent overall but rising to 10 per cent or more in Estonia and Poland (but small sample sizes in these countries).

Compared with previous surveys, it appears that fewer jobs are being charged as a per cent of their contract value, but this year the survey introduced the "other" methods option, so respondents now have more options to choose from. What is noticeable is that fewer jobs are being undertaken "at risk" - this year 3 per cent of jobs have no charge, compared with a high of 9 per cent in 2012 and 7 per cent in 2016.

TABLE 3-4
HOW CHARGES ARE CALCULATED

per cent current jobs	method of calculating charge				
	per cent of contract value	lump sum	hourly charge	no charge agreed (effectively "at risk")	other method
Austria	56	20	21	1	2
Belgium	51	24	18	1	6
Croatia	27	30	8	6	30
Cyprus *	52	46	2	0	0
Czech Republic	38	42	14	1	5
Denmark	23	33	34	1	8
Estonia *	13	40	20	10	17
Finland	12	30	43	1	14
France	66	24	5	1	5
Germany	5	6	15	1	72
Greece	26	48	3	3	20
Hungary *	60	21	4	2	13
Ireland	37	43	11	2	8
Italy	37	36	7	5	15
Lithuania	19	39	9	1	33
Luxembourg *	64	19	10	6	0
Malta *	34	29	24	3	10
Netherlands	19	45	30	2	5
Norway	12	38	42	1	6
Poland *	10	23	27	30	10
Portugal	39	34	9	4	15
Romania	27	24	7	2	39
Slovenia *	42	22	10	1	24
Spain	54	23	6	4	13
Sweden	3	33	56	3	6
United Kingdom	28	42	23	1	6
2018 EUROPE-26	32	28	13	3	25
2016 EUROPE-27	45	34	14	7	n/a
2014 EUROPE-26	47	32	14	7	n/a
2012 EUROPE-25	43	36	12	9	n/a
2010 EUROPE-23	49	29	18	5	n/a
2008 EUROPE-17	56	23	16	6	n/a

* caution - small sample

3.5 HOURLY CHARGE-OUT RATES

Average hourly rates refer to the average charged to clients for an hour of the architect's work, before tax.

In table 3-5, the data has been adjusted to take account of different price levels between the countries, using a Purchasing Power Parity (PPP) index. Unadjusted figures are given in table 3-6.

The PPP hourly charge-out rates for Principals (table 3-5) are highest in Austria, Denmark, Luxembourg, the Netherlands and the UK. Lowest hourly rates are recorded in Poland, Croatia, Greece and Romania.

Average hourly charge-out rates are higher than in the previous survey, for all staff types. Rates are also at their highest levels since the survey started ten years ago. The average rate for Principals has increased by 6 per cent, for architects it is 9 per cent higher, while the average rate for Technologists is 11 per cent more than two years ago.

Average unadjusted rates are generally higher than in 2016 in almost all countries. However, in France and Italy the average rates for Principals, architects and technologists remain unchanged compared with 2016, and in Sweden average rates have fallen for all three staff groups.

TABLE 3-5
AVERAGE HOURLY CHARGE-OUT RATES ADJUSTED TO TAKE ACCOUNT OF PURCHASING POWER PARITY (PPP)

€	average (median) hourly charge-out rates adjusted to take account of Purchasing Power Parities (PPP) Euros		
	principals	architect employees	technologists
Austria	92	83	69
Belgium	68	59	50
Croatia	25	14	16
Cyprus *	73	40	23
Czech Republic	32	23	20
Denmark	90	81	59
Estonia *	64	51	35
Finland	68	63	49
France	74	74	55
Germany	76	67	50
Greece	24	18	12
Hungary *	46	26	15
Ireland	78	54	44
Italy	40	30	25
Lithuania	31	23	12
Luxembourg *	87	71	51
Malta *	73	49	39
Netherlands	85	80	62
Norway	76	72	64
Poland *	26	13	6
Portugal	47	29	18
Romania	23	19	10
Slovenia *	41	35	21
Spain	27	27	16
Sweden	79	68	60
United Kingdom	83	73	54
2018 EUROPE-26	74	62	49
2016 EUROPE-27	70	57	45
2014 EUROPE-26	64	53	43
2012 EUROPE-25	54	44	29
2010 EUROPE-23	66	56	43
2008 EUROPE-17	62	50	39

Data is expressed in Euros but each country's figure has been adjusted using an index of Purchasing Power Parity (PPP). This index takes account of price level differences across countries. We have used an index sourced from Eurostat whose Comparative Price Level Indices assess the price level of each country in the comparison of European countries. Each country's average hourly rates figure is divided by one hundredth of the country's index value to create the PPP adjusted figure.

* caution - small sample

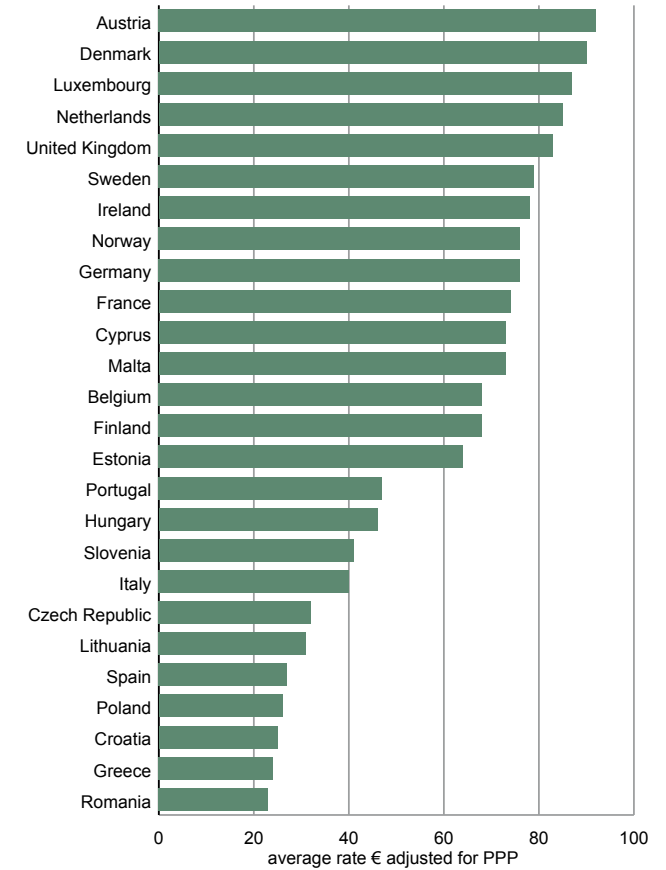


TABLE 3-6
AVERAGE HOURLY CHARGE-OUT RATES UNADJUSTED

€	average (median) hourly charge-out rates		
	principals	architect employees	technologists
Austria	100	90	75
Belgium	75	65	55
Croatia	17	9	11
Cyprus *	65	35	20
Czech Republic	23	16	14
Denmark	128	114	81
Estonia *	50	40	28
Finland	83	77	60
France	80	80	60
Germany	80	70	53
Greece	20	15	10
Hungary *	29	16	10
Ireland	95	65	53
Italy	40	30	25
Lithuania	20	15	8
Luxembourg *	110	90	65
Malta *	60	40	33
Netherlands	95	90	70
Norway	109	103	91
Poland *	15	7	4
Portugal	40	25	16
Romania	12	10	5
Slovenia *	35	30	18
Spain	25	25	15
Sweden	99	85	75
United Kingdom	96	85	62
2018 EUROPE-26	80	65	51
2016 EUROPE-27	75	60	46
2014 EUROPE-26	67	55	45
2012 EUROPE-25	55	43	30
2010 EUROPE-23	75	63	50
2008 EUROPE-17	63	50	40

* caution - small sample

CHART 3-7
AVERAGE HOURLY CHARGE-OUT RATES FOR PRINCIPALS ADJUSTED FOR PURCHASING POWER PARITY (PPP)



3.6 PRACTICE PROFITS

Pre-tax profits are expressed here as a percentage of turnover. Because profits often include an element of remuneration for principals, practice profits are typically higher for small practices than large ones.

The figures show that a practice with one person generates average profits of 64 per cent of turnover. In a 3 to 5 person practice profits are 43 per cent, reducing to 29 per cent in an 11 to 30 person practice, and 24 per cent in practices with more than 50 staff.

There may be variations in the definition of 'profits' so inter-country comparisons should be considered with caution.

CHART 3-8
PRACTICE PROFITS ANALYSED BY PRACTICE SIZE

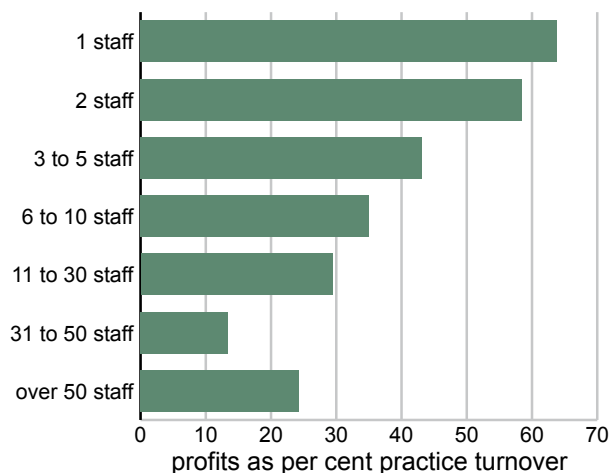


TABLE 3-7
AVERAGE PRE-TAX PROFITS AS A PERCENTAGE OF TOTAL TURNOVER
ANALYSED BY COUNTRY AND PRACTICE SIZE

per cent	size of architectural practice (number of architectural staff)						
	1 staff	2 staff	3 to 5 staff	6 to 10 staff	11 to 30 staff	31 to 50 staff	over 50 staff
Austria	55	41	30	20	19	n/a	n/a
Belgium	36	22	21	21	n/a	n/a	n/a
Croatia	28	12	10	32	n/a	n/a	n/a
Cyprus *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Czech Republic	56	n/a	41	41	18	n/a	n/a
Denmark	62	n/a	n/a	n/a	n/a	n/a	n/a
Estonia *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	53	n/a	27	17	17	n/a	n/a
France	41	27	16	15	9	n/a	n/a
Germany	62	51	40	32	26	15	16
Greece	36	49	43	n/a	n/a	n/a	n/a
Hungary *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Ireland	60	36	45	15	11	n/a	n/a
Italy	78	98	72	71	72	74	84
Lithuania	80	34	n/a	35	n/a	n/a	n/a
Luxembourg *	9	n/a	n/a	4	n/a	n/a	n/a
Malta *	90	n/a	n/a	36	n/a	n/a	n/a
Netherlands	61	54	31	27	17	n/a	n/a
Norway	49	n/a	n/a	n/a	21	n/a	n/a
Poland *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Portugal	52	50	30	20	n/a	n/a	n/a
Romania	70	45	38	42	n/a	n/a	n/a
Slovenia *	42	n/a	n/a	n/a	n/a	n/a	n/a
Spain	55	40	45	28	n/a	n/a	n/a
Sweden	26	14	25	16	19	n/a	11
United Kingdom	54	50	30	22	19	n/a	16
2018 EUROPE-26	64	59	43	35	29	13	24
2016 EUR-27	53	44	35	26	21	20	16
2014 EUR-26	60	49	44	29	22	24	22
2012 EUR-25	56	44	39	29	23	18	19
2010 EUR-23	45	34	29	22	20	13	15
2008 EUR17	52	44	40	31	26	17	26

* caution - small sample

3.7 TURNOVER FROM OUTSIDE OWN COUNTRY

Approximately 4 per cent of practice turnover is generated from work undertaken outside the country in which the architectural practice is based. In two countries, Cyprus and Luxembourg, more than 20 per cent of turnover comes from jobs based outside the country. In Denmark, Portugal, Hungary and Malta, more than 10 per cent of turnover is from outside the country.

Twice as much turnover comes from work within Europe as from outside Europe, although in Cyprus and Denmark more than 10 per cent of turnover comes from jobs located outside Europe.

This year's figures are very similar to the 2016 survey results; both figures suggest less work is coming from outside the practices' own country than in the 2008 to 2014 period.

CHART 3-9
SOURCE OF TURNOVER

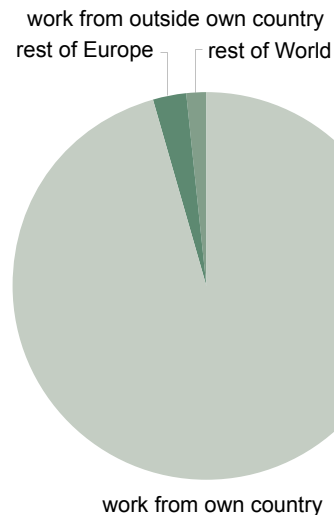


TABLE 3-8
PROPORTION OF PRACTICE TURNOVER DERIVED FROM OUTSIDE THE COUNTRY ANALYSED BY COUNTRY

per cent	turnover derived from outside the country		
	turnover from rest of Europe	turnover from outside Europe	TOTAL
Austria	7.8	0.7	8.5
Belgium	6.5	0.0	6.5
Croatia	2.1	3.3	5.5
Cyprus *	3.2	20.0	23.2
Czech Republic	4.9	2.9	7.8
Denmark	4.2	10.5	14.6
Estonia *	1.0	0.0	1.0
Finland	1.2	0.5	1.7
France	4.5	0.8	5.3
Germany	1.2	0.6	1.7
Greece	4.2	4.1	8.3
Hungary *	10.6	1.3	11.9
Ireland	3.9	2.5	6.3
Italy	3.1	2.1	5.2
Lithuania	7.3	0.7	8.0
Luxembourg *	21.8	0.0	21.8
Malta *	11.3	0.2	11.5
Netherlands	5.8	3.1	8.9
Norway	6.9	0.4	7.3
Poland *	0.0	0.0	0.0
Portugal	7.4	5.6	13.0
Romania	3.8	2.4	6.2
Slovenia *	7.7	0.0	7.7
Spain	1.7	1.3	3.0
Sweden	4.3	1.0	5.3
United Kingdom	2.0	3.2	5.1
2018 EUROPE-26	2.8	1.4	4.2
2016 EUROPE-27	2.7	1.6	4.3
2014 EUROPE-26	3.7	2.7	6.4
2012 EUROPE-25	n/a	n/a	5.6
2010 EUROPE-23	n/a	n/a	7.7
2008 EUROPE-17	n/a	n/a	6.0

* caution - small sample

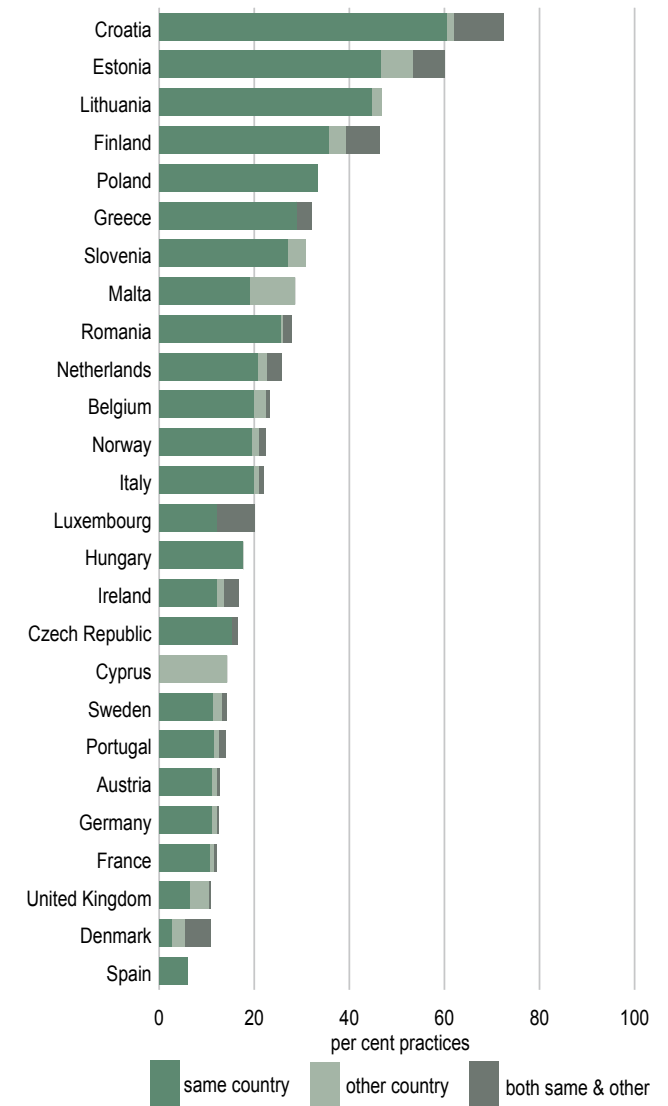
3.8 ASSOCIATIONS

TABLE 3-9
PROPORTION OF PRACTICES HAVING A FORMAL ASSOCIATION WITH ANOTHER PRACTICE

per cent	no formal association	have a formal association		
		with architect / practice in same country	with architect / practice in another country	both
Austria	87	11	1	1
Belgium	77	20	3	1
Croatia	28	61	1	11
Cyprus *	86	0	14	0
Czech Republic	84	15	0	1
Denmark	89	3	3	5
Estonia *	40	47	7	7
Finland	54	36	4	7
France	88	11	1	0
Germany	87	11	1	0
Greece	68	29	0	3
Hungary *	82	18	0	0
Ireland	83	12	2	3
Italy	78	20	1	1
Lithuania	53	45	2	0
Luxembourg *	80	12	0	8
Malta *	71	19	10	0
Netherlands	74	21	2	3
Norway	78	19	1	1
Poland *	67	33	0	0
Portugal	86	12	1	1
Romania	72	26	0	2
Slovenia *	69	27	4	0
Spain	94	6	0	0
Sweden	86	11	2	1
United Kingdom	89	6	4	0
2018 EUROPE-26	83	15	1	1
2016 EUROPE-27	80	17	2	1
2014 EUROPE-26	84	14	2	1
2012 EUROPE-25	79	18	2	1
2010 EUROPE-23	82	15	2	2
2008 EUROPE-17	85	12	3	n/a

* caution - small sample

CHART 3-10 PROPORTION OF PRACTICES HAVING A FORMAL ASSOCIATION WITH ANOTHER PRACTICE





3.8 ASSOCIATIONS (continued)

Overall, 17 per cent of practices in Europe have an association with another practice. In most cases, this is an association with a practice in the same country (table 3-9). The highest level of associations is to be found amongst practices in Croatia, Estonia, Lithuania and Finland; about half of practices in those countries have an association with another practice. Only in Cyprus do more practices have an association with a practice in another country than in the same country; and as well as Cyprus, more than 10 per cent of practices in Estonia, Croatia, Finland and Malta have an association with a practice in another country.

3.9 BRANCH OFFICES

A relatively small proportion of architects work in a branch office. The proportion is 6 per cent, unchanged since 2012, although at least 15 per cent of architects in Denmark, Sweden and the UK work in a branch office. For nearly all of those architects who do work in a branch office, the head office is located in the same country as the branch office and the same country as where the architect is established.

TABLE 3-10
PROPORTION OF ARCHITECTS WORKING IN BRANCH OFFICE AND
LOCATION OF BRANCH OFFICE'S HEAD OFFICE

per cent	work in branch office	for those who work in branch head office is located in...	
		same country as where branch office is located	same country as where architect is established
Austria	2	97	100
Belgium	7	93	100
Croatia	4	93	95
Cyprus *	0	67	100
Czech Republic	5	94	96
Denmark	18	93	94
Estonia *	11	60	60
Finland	11	72	71
France	3	96	96
Germany	5	76	75
Greece	6	96	93
Hungary *	12	82	89
Ireland	9	80	83
Italy	5	97	96
Lithuania	8	94	94
Luxembourg *	11	56	75
Malta *	6	88	75
Netherlands	7	94	79
Norway	10	0	72
Poland *	9	86	100
Portugal	8	88	83
Romania	10	94	85
Slovenia *	0	100	75
Spain	2	63	67
Sweden	16	79	79
United Kingdom	15	87	87
2018 EUROPE-26	6	91	90
2016 EUROPE-27	6	95	95
2014 EUROPE-26	6	96	96
2012 EUROPE-25	6	90	91
2010 EUROPE-23	12	89	98
2008 EUROPE-17	9	71	93

* caution - small sample

3.10 PUBLIC BIDS & ARCHITECTURAL DESIGN COMPETITIONS

Fewer practices participated in an Architectural Design Competition in 2018; 12 per cent, compared with 20 per cent in 2016. But maybe as a consequence, the success rate has increased; amongst public sector competitions the success rate was 43 per cent, rising to 58 per cent for private sector competitions. The highest level of participation in competitions is in Austria, Estonia, Luxembourg, France and the Czech Republic.

Practices made, on average, 2.3 bids for projects advertised in the OJEU during the past year. The figure was substantially higher for practices in the Netherlands and Belgium. In response to a new question for 2018, 78 per cent of architects said that they had experienced difficulties as part of the bidding process for OJEU advertised projects. About 40 per cent of these respondents reported they had difficulty in fulfilling the minimum turnover threshold; while nearly as many felt the process was too onerous. More than 30 per cent thought the bidding process was too costly, or that they had insufficient past experience.

On average, practices spent 288 hours in 2018 preparing for architectural design competitions. Total expenditure, including staff time preparing these bids, was very similar to the competition prize money received for successful bids. The total fees (excluding prize money) received for work on successful projects was 15 times the amount practices spent preparing these bids.

CHART 3-11
PRACTICES ENTERING ARCHITECTURAL DESIGN COMPETITIONS LAST 12 MONTHS

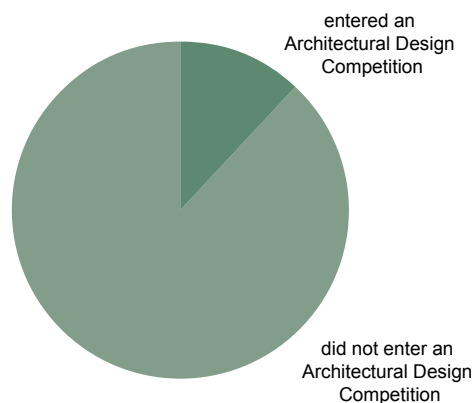


CHART 3-11
DIFFICULTIES EXPERIENCED BY PRACTICES IN THE OJEU BIDDING PROCESS

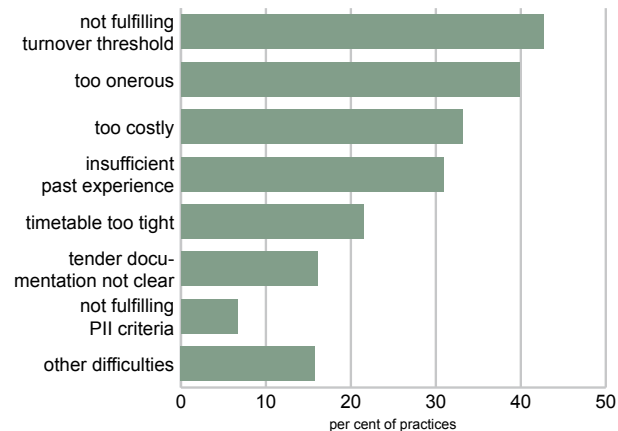


CHART 3-12
ARCHITECTURAL DESIGN COMPETITIONS ENTERED LAST 12 MONTHS - SUCCESS RATES

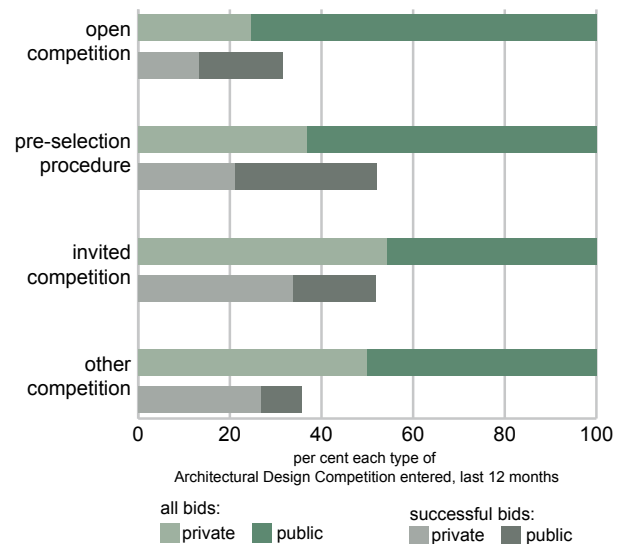


TABLE 3-11
ENTERING ARCHITECTURAL DESIGN COMPETITIONS AND BIDDING FOR PROJECTS ADVERTISED IN OJEU

per cent / number	% practices participating in Architectural Design Competition	average number of bids for OJEU projects
Austria	55	2.7
Belgium	22	18.9
Croatia	11	5.2
Cyprus *	14	0.9
Czech Republic	27	3.0
Denmark	8	3.1
Estonia *	39	1.8
Finland	11	2.4
France	29	4.3
Germany	7	0.9
Greece	5	4.7
Hungary *	14	0.9
Ireland	17	4.0
Italy	8	1.2
Lithuania	16	0.6
Luxembourg *	32	2.5
Malta *	12	5.0
Netherlands	23	23.6
Norway	14	5.0
Poland *	11	1.5
Portugal	7	0.6
Romania	9	0.3
Slovenia *	15	0.8
Spain	24	2.3
Sweden	9	2.1
United Kingdom	9	1.0
2018 EUROPE-26	12	2.3
2016 EUROPE-27	20	n/a
2014 EUROPE-26	n/a	n/a
2012 EUROPE-25	n/a	n/a
2010 EUROPE-23	n/a	n/a
2008 EUROPE-17	n/a	n/a

* caution - small sample



TABLE 3-12
TYPE OF ARCHITECTURAL DESIGN COMPETITION ENTERED LAST 12 MONTHS ANALYSED BY COUNTRY

per cent	Architectural Design Competitions entered last 12 months						
	open competition	competition with pre-selection procedure	invited competition	other competition	ALL	ALL public	ALL private
Austria	40	21	30	9	100	72	28
Belgium	46	25	29	1	100	86	14
Croatia	18	21	9	51	100	49	51
Cyprus *	29	29	29	14	100	100	0
Czech Republic	47	4	40	10	100	48	52
Denmark	11	65	8	15	100	76	24
Estonia *	41	0	55	5	100	41	59
Finland	54	6	23	17	100	74	26
France	20	67	6	7	100	88	12
Germany	20	48	26	6	100	77	23
Greece	78	22	0	0	100	56	44
Hungary *	79	0	21	0	100	79	21
Ireland	38	22	34	6	100	66	34
Italy	43	26	20	11	100	81	19
Lithuania	52	0	26	22	100	57	43
Luxembourg *	21	57	9	13	100	98	2
Malta *	97	0	1	2	100	6	94
Netherlands	32	26	39	3	100	80	20
Norway	29	39	22	10	100	73	27
Poland *	33	0	67	0	100	100	0
Portugal	47	2	45	6	100	54	46
Romania	48	11	37	4	100	32	68
Slovenia *	75	15	10	0	100	80	20
Spain	83	4	12	0	100	86	14
Sweden	13	38	31	18	100	49	51
United Kingdom	25	25	41	8	100	65	35
2018 EUROPE-26	15	63	17	5	100	63	37
2016 EUROPE-27	36	28	24	12	100	73	27
2014 EUROPE-26	n/a	n/a	n/a	n/a	n/a	82	18
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a	n/a	n/a

* caution - small sample



TABLE 3-13
ARCHITECTURAL DESIGN COMPETITION
SUCCESS RATES

per cent	Architectural Design Competitions entered last 12 months	
	success rate - public	success rate - private
Austria	35	42
Belgium	5	48
Croatia	53	65
Cyprus *	100	n/a
Czech Republic	37	57
Denmark	33	46
Estonia *	22	62
Finland	35	54
France	21	37
Germany	33	45
Greece	33	33
Hungary *	18	67
Ireland	27	59
Italy	23	51
Lithuania	38	33
Luxembourg *	49	0
Malta *	60	79
Netherlands	13	57
Norway	29	67
Poland *	67	n/a
Portugal	48	61
Romania	62	56
Slovenia *	9	0
Spain	15	18
Sweden	55	50
United Kingdom	33	51
2018 EUROPE-26	43	58
2016 EUROPE-27	31	48
2014 EUROPE-26	n/a	n/a
2012 EUROPE-25	n/a	n/a
2010 EUROPE-23	n/a	n/a
2008 EUROPE-17	n/a	n/a

* caution - small sample



TABLE 3-14

INVESTMENT AND REWARDS: PARTICIPATION IN ARCHITECTURAL DESIGN COMPETITIONS LAST 12 MONTHS ANALYSED BY COUNTRY

average (mean) per practice	all Architectural Design Competitions entered last 12 months				Architectural Design Competition prize money	
	number of hours spent participating in Architectural Design Competitions	average total financial cost** per practice of participating €	average fee turnover per practice from successful Architectural Design Competitions €	average build cost per practice of won projects € million	receive prize money - per cent of ALL practices which were successful at Architectural Design Competitions	average prize money (excluding zero) €
Austria	663	32 117	74 165	52.3	35	12 512
Belgium	529	53 315	651 176	15.6	9	2 273
Croatia	152	3 044	202 464	2.8	50	10 971
Cyprus *	183	950	5 000	10.2	40	4 500
Czech Republic	236	5 902	35 485	17.7	31	7 724
Denmark	1 726	137 341	1 033 244	23.7	26	29 432
Estonia *	363	5 373	32 502	3.9	60	5 003
Finland	854	31 756	320 833	21.8	26	32 667
France	311	15 602	238 162	6.4	15	41 587
Germany	1 006	46 283	691 989	16.4	82	29 766
Greece	84	602	1 000	1.3	6	1 250
Hungary *	261	4 582	429 807	9.4	31	9 351
Ireland	98	7 453	43 000	10.5	6	3 571
Italy	66	1 289	28 436	0.8	9	3 676
Lithuania	131	2 339	45 000	6.1	19	4 429
Luxembourg *	881	40 714	178 750	10.7	22	11 100
Malta *	38	2 685	n/a	n/a	0	n/a
Netherlands	223	15 188	158 416	6.9	9	2 678
Norway	1 315	104 312	404 864	21.0	18	33 767
Poland *	603	3 281	145 283	10.5	33	187 462
Portugal	123	3 219	54 089	3.8	12	20 873
Romania	34	402	19 694	1.0	5	413
Slovenia *	286	4 380	3 333	0.9	15	1 433
Spain	127	1 550	28 932	2.0	13	6 338
Sweden	921	67 773	704 016	28.0	16	105 693
United Kingdom	53	5 843	136 060	3.9	3	7 668
2018 EUROPE-26	288	14 266	217 442	11.2	19	17 955
2016 EUROPE-27	424	12 624	113 822	11.6	17	13 110
2014 EUROPE-26	n/a	n/a	n/a	n/a	n/a	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a	n/a

* caution - small sample

** includes staff costs

3.11 CERTIFICATION WORK

TABLE 3-15
ARCHITECTURAL PRACTICES OFFERING CERTIFICATION SERVICES ANALYSED BY COUNTRY

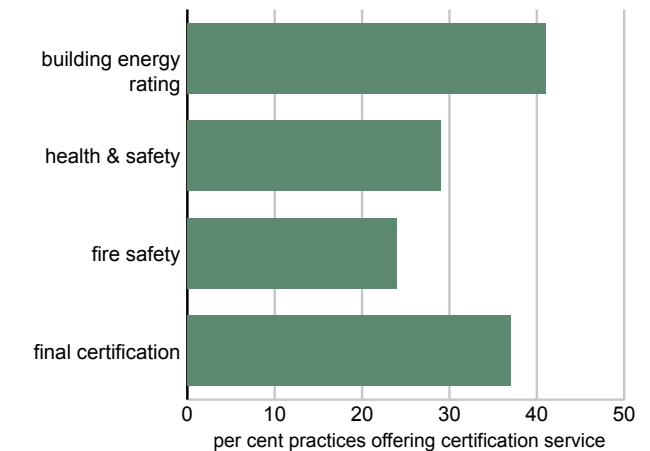
per cent of practices who offer service	type of certification offered				offer a Post Occupancy Evaluation
	building energy rating	health & safety	fire safety	final certification of whole building	
Austria	21	6	8	13	10
Belgium	23	13	11	10	6
Croatia	34	25	14	20	8
Cyprus *	14	9	0	29	0
Czech Republic	28	43	29	16	2
Denmark	6	0	3	0	6
Estonia *	8	15	25	17	7
Finland	14	44	14	17	7
France	14	13	13	11	9
Germany	n/a	n/a	n/a	n/a	n/a
Greece	56	11	39	37	11
Hungary *	29	16	19	38	6
Ireland	10	47	40	89	10
Italy	54	32	22	42	18
Lithuania	15	12	5	5	7
Luxembourg *	60	3	13	7	14
Malta *	42	11	5	52	9
Netherlands	27	14	15	8	7
Norway	19	17	9	20	13
Poland *	20	14	0	0	0
Portugal	13	29	29	26	13
Romania	18	15	31	22	18
Slovenia *	13	2	0	0	12
Spain	88	56	61	81	10
Sweden	13	20	10	14	9
United Kingdom	6	25	3	43	19
2018 EUROPE-26	41	29	24	37	13
2016 EUROPE-27	44	26	26	n/a	n/a
2014 EUROPE-26	42	24	35	n/a	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a

* caution - small sample

More than a third of architectural practices offer building energy rating and the final certification of the whole building. Rather fewer practices, but still about a quarter, offer health & safety and fire safety certification service. More architects in Ireland and Spain than anywhere else (over 80 per cent) offer final certification of the whole building. More than half of practices in Spain, Luxembourg, Greece and Italy offer building energy rating; more than 50 per cent in Spain offer fire safety certification, and health & safety certification.

A new question for 2018 finds that 13 per cent of practices offer a Post Occupancy Evaluation (POE). A POE makes it possible to find out whether the building performs energetically in the way it was designed by the architect. The proportion of architects offering this is highest in the UK, Italy and Romania.

CHART 3-14
CERTIFICATION SERVICES OFFERED



3.12 USE OF BIM

TABLE 3-15
ARCHITECTS' AWARENESS AND USE OF BIM - LAST 12 MONTHS ANALYSED BY COUNTRY

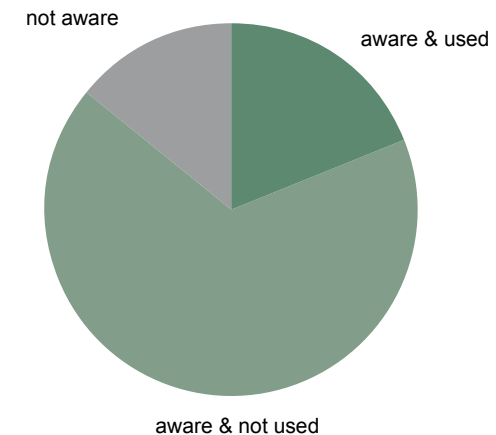
per cent respondents	all practices			practices which have used BIM
	have used BIM	aware of BIM but have not used	not aware of BIM	% of projects on which BIM used
Austria	21	67	12	39
Belgium	29	64	7	48
Croatia	30	66	4	28
Cyprus *	0	50	50	n/a
Czech Republic	24	68	8	37
Denmark	52	39	9	48
Estonia *	50	36	14	56
Finland	65	24	11	70
France	24	58	18	42
Germany	12	81	7	48
Greece	11	39	51	n/a
Hungary *	22	44	33	29
Ireland	24	76	0	29
Italy	15	57	28	28
Lithuania	28	67	5	53
Luxembourg *	55	36	9	41
Malta *	18	50	32	31
Netherlands	41	55	4	50
Norway	68	27	5	67
Poland *	20	80	0	2
Portugal	24	37	39	21
Romania	33	34	33	47
Slovenia *	40	32	28	55
Spain	32	65	3	38
Sweden	56	16	27	53
United Kingdom	26	72	2	39
2018 EUROPE-26	19	67	14	37
2016 EUROPE-27	n/a	n/a	n/a	n/a
2014 EUROPE-26	n/a	n/a	n/a	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a
2008 EUROPE-17*	n/a	n/a	n/a	n/a

* caution small sample 2008-2016: question was not asked in previous surveys

In response to a new question in this year's survey, Principals said whether or not their practice was aware of Building Information Modelling (BIM) and how much their practice had used BIM in the last year. Only a small minority, 14 per cent, of practices are not aware of BIM. Lowest levels of awareness are to be found in Greece and Cyprus, where about half of practices are not aware of BIM. About one third of practices in Portugal, Hungary, Romania and Malta are not aware of BIM.

Across Europe, 19 per cent of practices have used BIM in the last 12 months, and they have used BIM on an average of 37 per cent of the projects they have been working on. The highest proportion of practices using BIM is to be found in Norway, Sweden, Luxembourg, Finland and Estonia. Sweden stands out as having both a high use of BIM but also a relatively large proportion of practices which are not aware of BIM.

CHART 3-15
PRACTICES' AWARENESS AND USE OF BIM



14| ARCHITECTS - THE INDIVIDUAL



4.1 EARNINGS

This year's survey shows that architects' earnings continue to recover from the economic crisis although earnings are still not as high as they were in 2008. The average of all architects' earnings is €32700 (adjusted for PPP). This is 2 per cent higher than the 2016 survey figure, continuing a gradual upward trend which started after 2014.

The headline rise is tempered by the finding that average earnings have barely changed, or even gone down, in several countries. In two countries, Poland and Greece, average earnings have trended down over the last ten years and are lower now than in any of the previous surveys.

The adjustment of average earnings for Purchasing Power Parity (PPP) takes account of differing price levels in the surveyed countries adjusting each country's average earnings figure by its PPP index. Earnings figures in the country pages are not adjusted.

Earnings data converted from local currencies to Euros exchange rate as at 01.05.18

All earnings are before tax.

CHART 4-1
CHANGE IN ALL ARCHITECTS' AVERAGE PRE-TAX EARNINGS (ALL SURVEY COUNTRIES) 2008 TO 2018

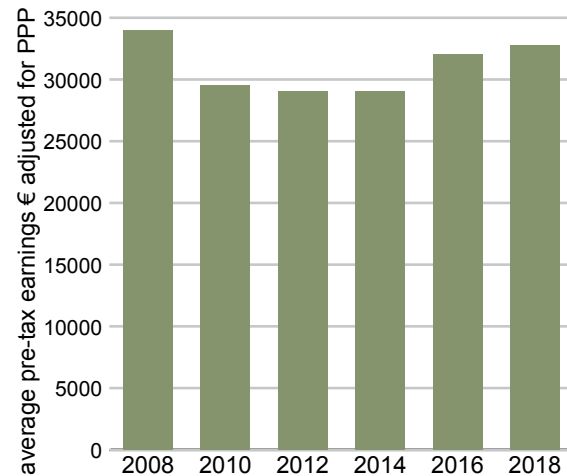


CHART 4-2
RANGE OF AVERAGE PRE-TAX EARNINGS FOR ALL FULL-TIME ARCHITECTS, ADJUSTED FOR PPP

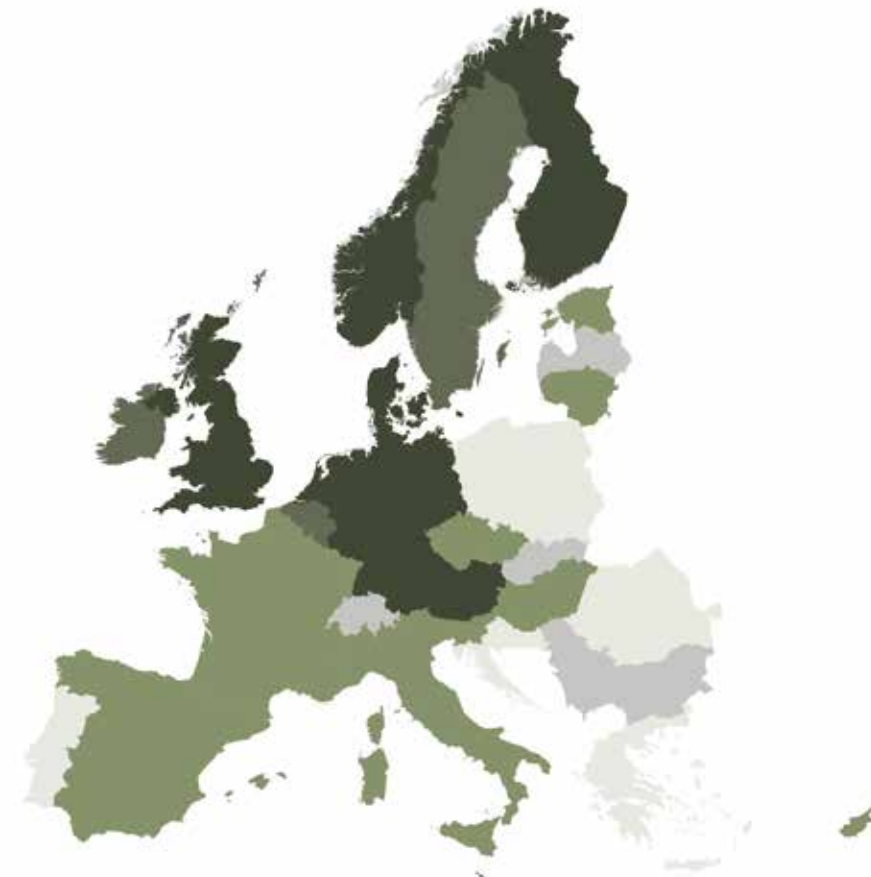
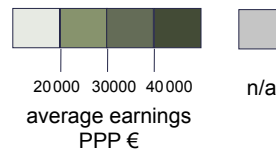




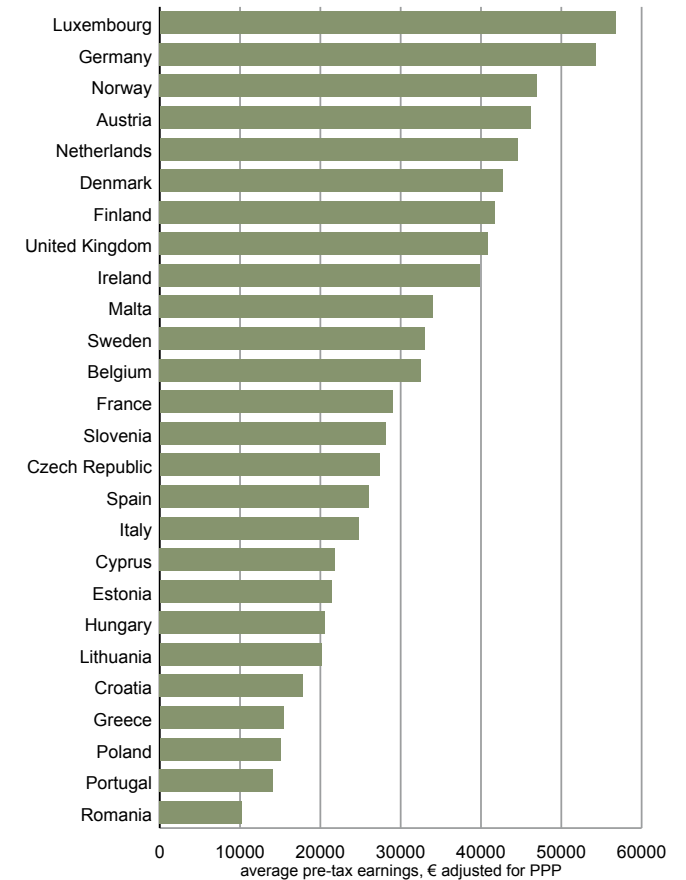
TABLE 4-1
AVERAGE PRE-TAX EARNINGS OF ALL FULL-TIME ARCHITECTS ANALYSED BY COUNTRY

€	average (median) pre-tax earnings 2018		average (median) pre-tax earnings adjusted for PPP				
	adjusted for PPP	unadjusted for PPP	2016	2014	2012	2010	2008
Austria	46 168	50 000	47 529	42 095	42 174	38 925	47 337
Belgium	32 520	36 000	35 481	30 192	28 354	28 384	28 222
Croatia	17 844	11 955	19 338	17 946	18 078	18 892	n/a
Cyprus *	21 808	19 300	20 023	n/a	n/a	n/a	n/a
Czech Republic	27 375	18 986	17 518	13 150	19 410	21 268	n/a
Denmark	42 684	58 385	39 478	43 187	42 543	37 843	39 012
Estonia *	21 401	16 800	19 947	22 215	12 776	15 318	36 084
Finland	41 735	51 000	41 771	40 486	38 339	35 601	32 327
France	28 998	32 000	27 986	27 498	27 326	28 871	33 241
Germany	54 286	57 000	n/a	43 350	46 422	39 932	38 797
Greece	15 421	13 000	n/a	16 145	18 927	20 534	26 846
Hungary *	20 566	12 751	19 609	n/a	13 678	n/a	n/a
Ireland	39 872	50 000	40 816	38 103	36 847	40 200	52 209
Italy	24 728	25 000	24 777	27 132	24 248	18 779	n/a
Lithuania	20 124	13 000	n/a	n/a	n/a	10 252	n/a
Luxembourg *	56 738	72 000	58 725	48 701	46 267	n/a	44 484
Malta *	34 022	28 000	35 122	36 478	32 051	n/a	34 447
Netherlands	44 524	50 000	39 047	54 496	n/a	n/a	n/a
Norway	46 965	67 019	n/a	n/a	n/a	n/a	n/a
Poland *	15 010	8 436	17 489	n/a	22 045	24 935	n/a
Portugal	14 101	12 000	14 833	13 433	13 714	n/a	n/a
Romania	10 273	5 363	15 274	9 822	10 844	8 172	22 748
Slovenia *	28 136	24 000	24 406	19 808	17 964	29 240	31 491
Spain	26 002	24 000	24 390	28 354	20 534	n/a	n/a
Sweden	33 052	41 480	41 216	35 890	35 649	36 612	29 990
United Kingdom	40 862	47 645	38 871	37 582	48 242	45 922	45 014
2018 EUROPE-26** (2016-27 2014-26 2012-25 2010-23 2008-17)	32 731	34 066	32 068	29 070	29 014	29 493	34 003

* caution - small sample

** The 2018 Europe-26 figure is weighted to reflect the total architectural population in all participating countries
Earnings data converted from local currencies to Euros exchange rate as at 01.05.18

CHART 4-3
AVERAGE PRE-TAX EARNINGS ALL FULL-TIME ARCHITECTS ADJUSTED FOR PURCHASING POWER PARITY (PPP)

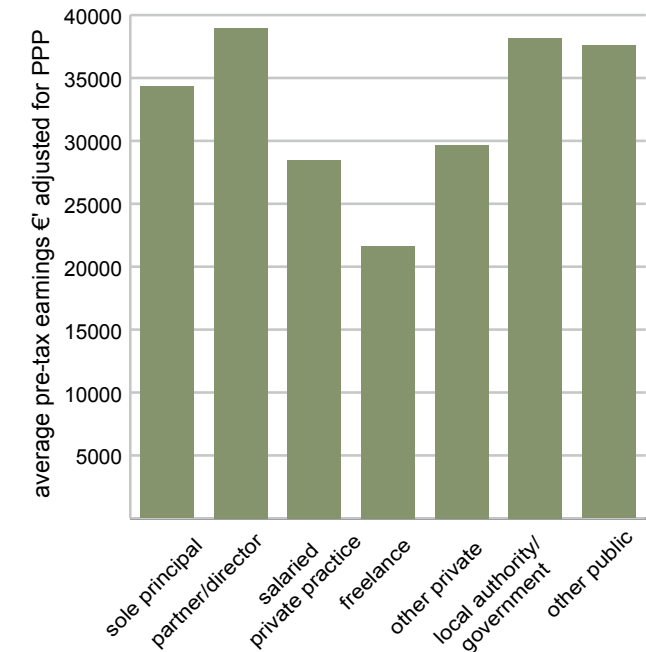


4.2 EARNINGS BY FIELD OF EMPLOYMENT

TABLE 4-2
AVERAGE PRE-TAX EARNINGS ANALYSED BY COUNTRY AND FIELD OF EMPLOYMENT (ADJUSTED FOR PPP)

€	average (median) pre-tax earnings adjusted for PPP									
	sole principal	partner/director	ALL Principals	private practice salaried employees	freelance	other private	ALL private	local / central gov't	other public	ALL public
Austria	46 168	48 707	46 168	n/a	n/a	n/a	46 168	n/a	n/a	n/a
Belgium	36 134	36 134	36 134	34 327	30 714	n/a	31 617	n/a	n/a	n/a
Croatia	14 504	19 741	17 727	16 921	n/a	n/a	17 558	30 216	10 072	21 151
Cyprus *	n/a	48 023	33 898	n/a	n/a	n/a	20 339	n/a	n/a	n/a
Czech Republic	20 037	32 455	25 399	28 221	25 399	n/a	25 399	34 995	n/a	33 866
Denmark	49 014	55 015	52 170	42 684	n/a	56 912	45 530	30 069	5 217	17 785
Estonia *	n/a	n/a	23 567	23 057	n/a	n/a	21 401	n/a	n/a	n/a
Finland	63 421	73 650	71 195	40 917	n/a	60 638	40 917	42 962	40 917	42 406
France	27 574	35 077	27 574	33 088	24 816	38 143	27 574	41 360	39 522	39 522
Germany	60 192	70 952	63 492	45 714	37 619	57 143	52 381	57 511	61 905	58 036
Greece	11 862	n/a	11 862	16 014	8 897	n/a	11 862	17 794	17 794	17 794
Hungary *	n/a	n/a	54 756	18 509	39 075	n/a	21 450	n/a	n/a	n/a
Ireland	39 872	47 847	47 847	38 278	n/a	n/a	39 872	55 821	58 214	56 619
Italy	26 706	29 674	27 695	21 761	19 782	20 772	24 728	29 674	29 674	29 674
Lithuania	23 220	27 864	25 078	18 576	15 480	n/a	20 898	n/a	n/a	n/a
Luxembourg *	39 401	65 012	45 902	86 682	n/a	n/a	57 920	n/a	n/a	n/a
Malta *	54 678	n/a	54 678	30 377	n/a	56 430	34 022	34 022	32 199	33 111
Netherlands	53 428	48 976	53 428	40 071	37 845	44 524	44 524	53 428	48 976	52 428
Norway	50 578	53 829	50 578	46 748	35 892	62 138	47 875	44 219	42 189	43 352
Poland *	n/a	n/a	16 678	15 010	n/a	n/a	15 010	n/a	n/a	n/a
Portugal	13 231	17 603	14 101	11 751	15 511	11 986	13 161	19 718	17 626	18 801
Romania	20 547	11 237	14 794	6 678	11 883	23 487	10 536	n/a	2 482	2 474
Slovenia *	40 445	n/a	41 325	n/a	24 619	n/a	28 136	n/a	n/a	n/a
Spain	31 528	28 169	30 444	19 502	21 668	24 919	23 835	41 170	36 403	38 787
Sweden	27 042	45 071	41 580	32 526	n/a	n/a	33 052	35 155	33 767	35 155
United Kingdom	34 051	44 753	39 889	38 916	n/a	64 211	38 916	48 645	50 591	50 591
2018 EUR-26	34 322	38 960	35 995	28 492	21 668	29 674	31 122	38 200	37 587	37 773
2016 EUR-27	35 679	49 640	39 643	29 732	19 822	27 750	34 277	34 563	29 732	33 379
2014 EUR-26	29 070	38 760	31 977	28 571	19 380	29 636	29 070	31 159	31 372	31 224
2012 EUR-25	29 098	39 767	29 098	28 167	19 399	29 098	28 487	32 004	29 098	30 807
2010 EUR-23	30 144	40 000	33 364	27 556	25 416	32 517	29 852	34 223	27 556	31 957
2008 EUR-17	37 895	43 605	38 952	30 182	29 070	43 605	34 597	33 915	26 964	32 131

CHART 4-4
PRE-TAX EARNINGS BY FIELD OF EMPLOYMENT (ADJUSTED FOR PPP)



* caution - small sample

Earnings data converted from local currencies to Euros exchange rate as at 01.05.18 and then adjusted for PPP



Partners & Directors continue to earn the most, although this year architects working in the public sector earn nearly as much. Partners & Directors earn, on average, 37 per cent more than private practice salaried employees and 16 per cent more than Sole Principals. The group with the lowest average earnings is freelance architects, whose average earnings are not much more than half those of private practice salaried architects.

Compared with the previous survey in 2016, it is public sector architects who have seen the largest increases. Within private practice, average earnings have fallen back. Similarly, Sole Principals earn slightly less in 2018 compared with two years earlier.

Architects' average earnings rise in line with age increasing consistently between each five year age group up to age 55-59, the peak earnings age. Architects aged under 30 earn significantly less than any other group; the average earnings of architects aged 35-39 are double those of architects aged under 30.

In all cases, figures quoted are based on data which has been adjusted for PPP.

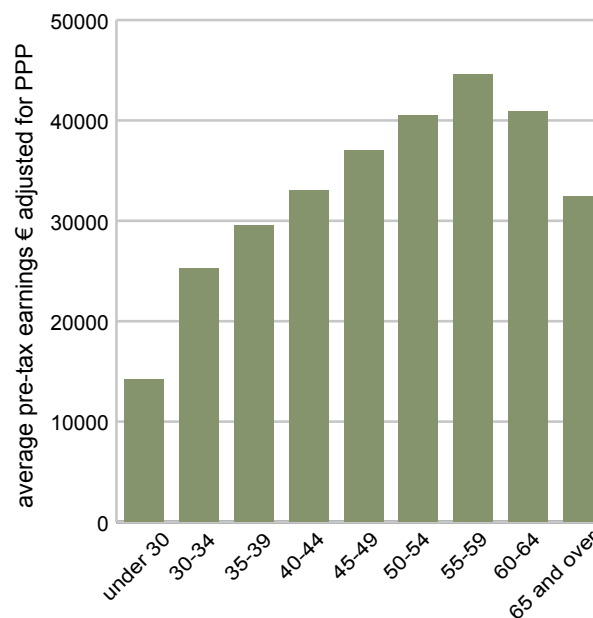
4.3 EARNINGS BY AGE

TABLE 4-3
AVERAGE PRE-TAX EARNINGS ANALYSED BY AGE (ADJUSTED FOR PPP)

€	2018			2016 EUROPE-27 MEDIAN	2014 EUROPE-26 MEDIAN	2012 EUROPE-25 MEDIAN	2010 EUROPE-23 MEDIAN	2008 EUROPE-17 MEDIAN
	lower quartile	MEDIAN	upper quartile					
<30	9891	14 185	30 083	16 848	14 241	14 549	15 615	17 041
30-34	16 738	25 231	40 690	22 995	14 763	19 399	24 550	29 214
35-39	19 782	29 504	47 619	26 759	30 189	24 902	30 075	34 677
40-44	23 722	33 038	54 514	29 732	32 704	29 098	33 364	38 760
45-49	25 717	36 960	61 905	36 022	38 611	33 800	33 364	39 729
50-54	29 674	40 469	69 571	40 634	44 025	36 081	34 317	42 391
55-59	31 652	44 577	74 286	42 440	44 824	38 797	35 119	43 647
60-64	29 674	40 844	73 529	42 751	48 264	41 370	40 875	41 890
65+	20 547	32 375	66 176	39 374	29 151	37 354	36 095	n/a

Earnings data converted from local currencies to Euros exchange rate as at 01.05.18 and then adjusted for PPP

CHART 4-5
AVERAGE PRE-TAX EARNINGS BY AGE
(ADJUSTED FOR PPP)



4.4 EARNINGS BY GENDER

Male and female average full-time earnings historically follow a very similar trend, and the differential has ranged between 25 and 32 per cent in favour of males. The 2018 figure shows the gender pay gap is 25 per cent in favour of male architects. The pay gap is considerably smaller for part-time earnings, having fallen from 11 per cent in favour of males in 2016, to 2 per cent in 2018. Analysed by country, the gender pay gap is widest in Belgium, Romania and Luxembourg. In Croatia and the Czech Republic, average female earnings are slightly higher than male earnings. In general, the gender pay gap increases with age; in age 30 to 34 the gap is negative, meaning that female earnings are slightly higher than male earnings.

CHART 4-6
AVERAGE PRE-TAX EARNINGS OF MALE AND FEMALE ARCHITECTS WORKING FULL-TIME (ADJUSTED FOR PPP)

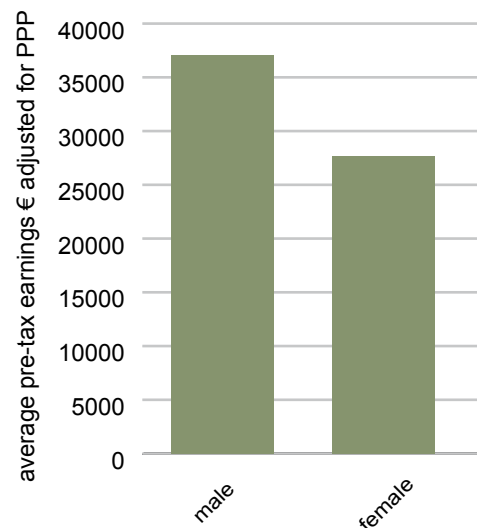


TABLE 4-4
AVERAGE PRE-TAX EARNINGS ANALYSED BY GENDER AND FULL-TIME OR PART-TIME WORKING (ADJUSTED FOR PPP AND PART-TIME EARNINGS ADJUSTED TO FULL-TIME EQUIVALENT)

€		2018**			2016	2014	2012	2010	2008
		lower quartile	MEDIAN	upper quartile	EUROPE-27 MEDIAN	EUROPE-26 MEDIAN	EUROPE-26 MEDIAN	EUROPE-23 MEDIAN	EUROPE-17 MEDIAN
Full time	male	25824	37095	65714	36664	32213	30948	32149	38760
	female	17804	27711	47619	24777	24225	21680	21866	26620
Part time FTE*	male	18546	32395	63846	27874	30105	34099	37936	30431
	female	25993	31806	49904	24777	23750	24137	25862	24225

Earnings data converted from local currencies to Euros exchange rate as at 01.05.18 and then adjusted for PPP

* full-time equivalent (FTE) based on converting part-time earnings to a working week of 37.5 hours

CHART 4-7
CHANGE IN MALE / FEMALE ARCHITECTS' AVERAGE PRE-TAX EARNINGS 2008-18

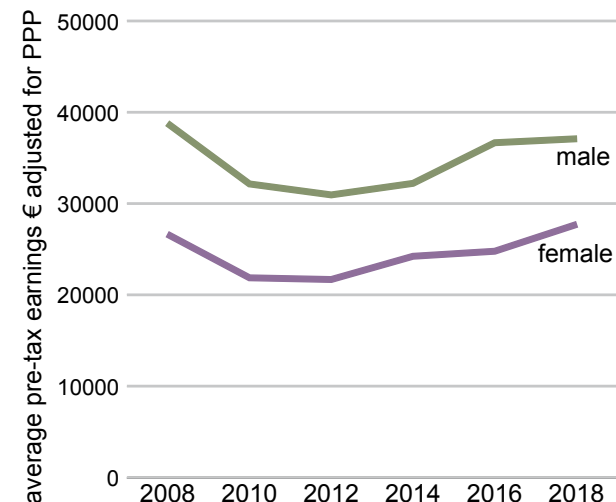


CHART 4-8
CHANGE IN MALE / FEMALE ARCHITECTS' AVERAGE PRE-TAX EARNINGS 2008-18

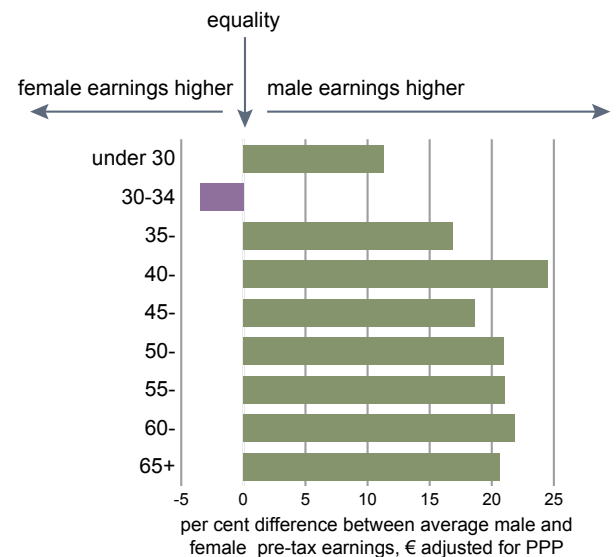


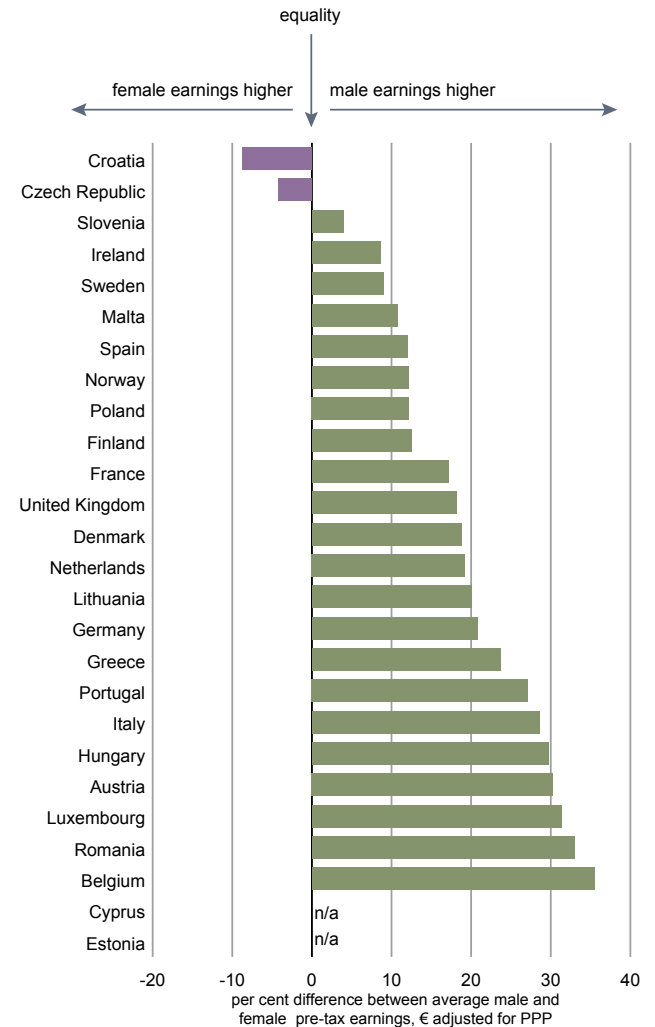
TABLE 4-5
AVERAGE PRE-TAX MALE AND FEMALE EARNINGS ANALYSED BY
COUNTRY AND SELECTED FIELD OF EMPLOYMENT (ADJUSTED FOR PPP)

indicates female earnings exceed male earnings. In all other cases, male earnings exceed female earnings

per cent difference between male & female earnings	sole principal	partner/ director	private practice salaried employees	ALL		
				male median pre-tax earnings €	female median pre-tax earnings €	per cent difference
Austria	30	20	n/a	50785	35411	30
Belgium	51	n/a	42	36134	23313	35
Croatia	10	29	20	16679	18130	9
Cyprus *	n/a	n/a	n/a	n/a	n/a	n/a
Czech Republic	n/a	n/a	0	27093	28221	4
Denmark	64	n/a	27	46716	37942	19
Estonia *	n/a	n/a	n/a	n/a	n/a	n/a
Finland	71	n/a	10	45827	40098	13
France	25	43	17	32169	26654	17
Germany	36	24	16	58095	46000	21
Greece	5	n/a	35	17794	13582	24
Hungary *	n/a	n/a	18	22807	16041	30
Ireland	41	33	5	41467	37879	9
Italy	22	29	28	27695	19782	29
Lithuania	n/a	17	24	23220	18576	20
Luxembourg *	31	n/a	n/a	64815	44523	31
Malta *	n/a	n/a	8	34022	30377	11
Netherlands	17	30	25	46305	37400	19
Norway	7	58	4	50578	44436	12
Poland *	n/a	n/a	44	17095	15010	12
Portugal	5	25	30	16451	11986	27
Romania	57	25	6	13972	9369	33
Slovenia *	21	n/a	n/a	29308	28136	4
Spain	37	55	12	27086	23835	12
Sweden	53	5	3	35155	32000	9
United Kingdom	34	43	9	42807	35024	18
2018 EUR-26	32	46	17	37095	27711	25
2016 EUR-27	36	35	31	36664	24777	32
2014 EUR-26	25	29	25	32213	24225	25
2012 EUR-25	30	58	32	30948	21680	30
2010 EUR-23	32	34	30	32149	21866	32
2008 EUR-17	32	29	30	38760	26620	31

* caution - small sample 'Per cent difference' calculated as difference as a percentage of male earnings
Earnings data converted from local currencies to Euros exchange rate as at 01.05.18 and then adjusted for PPP

CHART 4-9
AVERAGE PRE-TAX MALE AND FEMALE EARNINGS
ALL FULL-TIME ARCHITECTS ADJUSTED FOR
PURCHASING POWER PARITY (PPP)

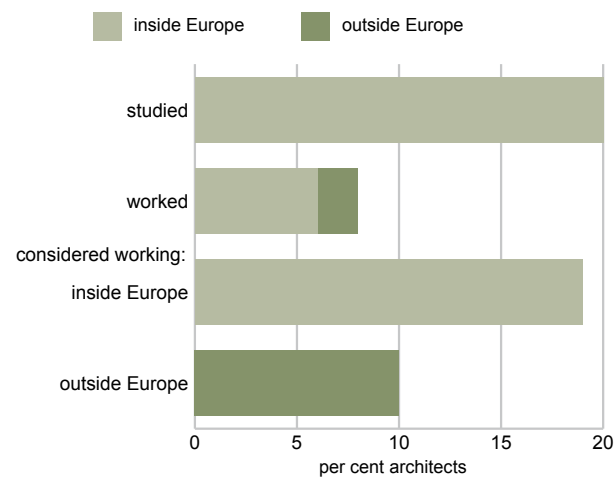


4.5 WORKING & STUDYING IN ANOTHER EUROPEAN COUNTRY

One in five architects has studied in another country, and one in twelve architects has worked in another country in the last 12 months. Nearly all of those studying in another country did so in another European country, although about half of these architects studied in a country outside Europe as well. In the last twelve months, 6 per cent of architects have worked in another country in Europe, and 2 per cent in a country outside Europe. Substantial numbers of architects have “seriously considered” working in another country in the last 12 months; 19 per cent have seriously considered working in another European country, and 10 per cent in a country outside Europe.

More than half of architects from Cyprus, Luxembourg, Norway and Greece have undertaken part of their architectural education in another country. About half or more architects in Romania, Slovenia, Malta and Greece have worked, or seriously considered working, in another country in the last year.

CHART 4-10
PROPORTION OF ARCHITECTS WHO HAVE STUDIED / WORKED OR SERIOUSLY CONSIDERED WORKING IN ANOTHER COUNTRY IN LAST 12 MONTHS



1: longer periods or on-going work
 * caution - small sample
 n/a = question not asked

TABLE 4-6
PROPORTION OF ARCHITECTS WHO HAVE WORKED IN ANOTHER COUNTRY (LAST 12 MONTHS)

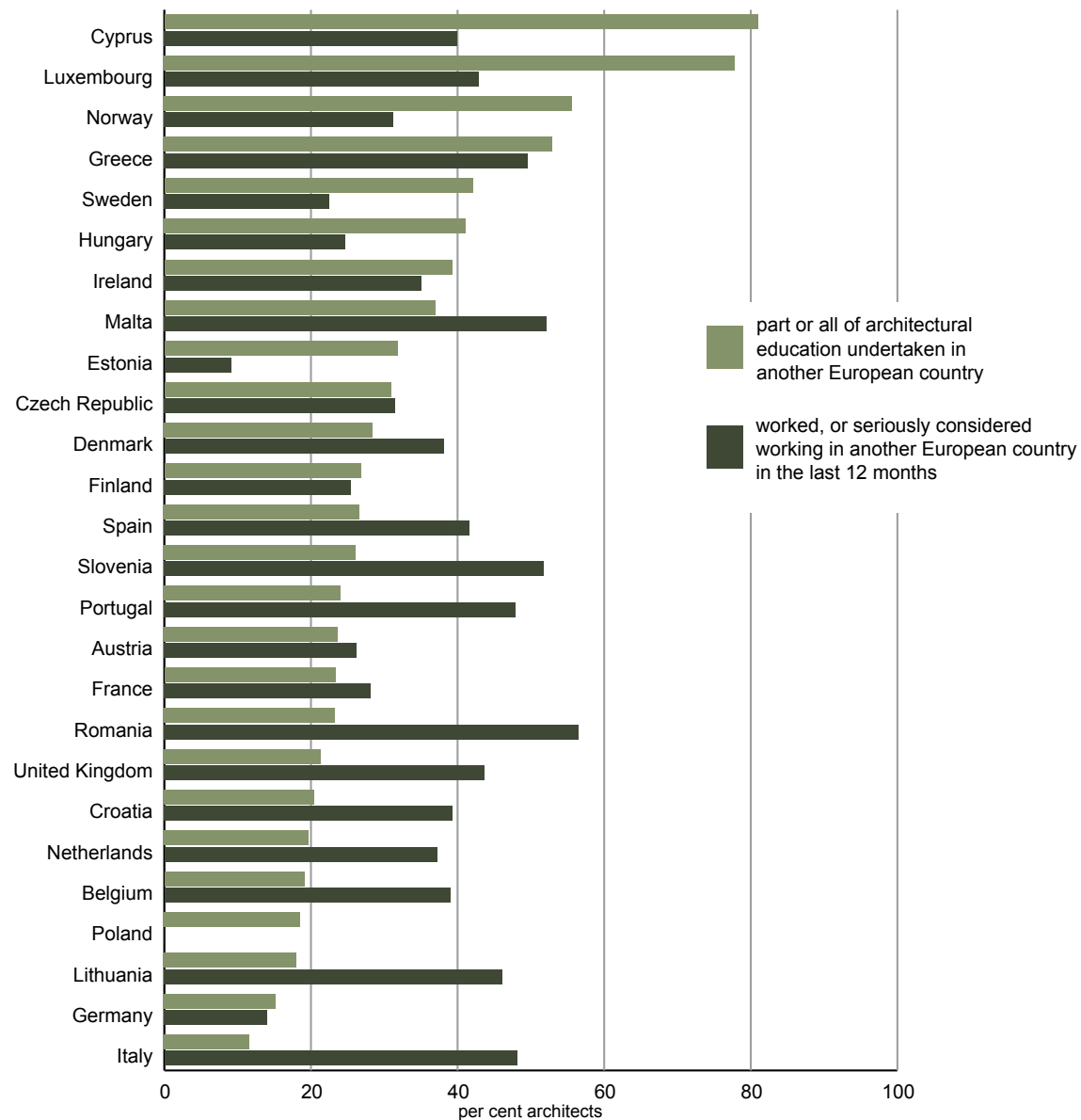
per cent / number	inside Europe			outside Europe	All
	have worked in another country in Europe last 12 months (%)	of whom: average (mean) number of countries working		have worked in another country outside Europe in last 12 months (%)	most popular destinations
		for short periods	for longer periods (1)		
Austria	10	1.5	1.5	4	DE IT
Belgium	13	1.8	0.2	1	FR
Croatia	5	1.9	0.6	1	BA DE
Cyprus *	0	n/a	n/a	10	n/a
Czech Republic	10	1.1	0.8	3	SK DE FR
Denmark	9	1.5	0.8	5	SE NO
Estonia *	0	n/a	n/a	0	NO DE
Finland	3	2.7	1.1	2	NO SE
France	5	1.3	0.9	3	CH BE
Germany	4	1.7	0.9	2	n/a
Greece	3	1.9	1.4	1	IT OTHERS
Hungary *	4	2	1	0	NO PL DE
Ireland	10	1.7	1.3	6	UK
Italy	4	1	0.6	3	FR UK CH
Lithuania	7	2	1	3	NO LV
Luxembourg *	29	1	2.5	0	BE FR DE
Malta *	6	1.3	0.7	2	UK
Netherlands	15	1.1	1	7	BE
Norway	6	0.8	0.5	2	SE
Poland *	0	n/a	n/a	0	n/a
Portugal	5	0.7	0.8	5	ES IT
Romania	7	0.9	0.8	1	DE UK
Slovenia *	17	1.3	1	2	HR AT
Spain	3	1	0.6	2	DE UK FR PL
Sweden	5	0.7	0.8	1	DK UK
United Kingdom	6	0.9	0.6	4	IE
2018 EUROPE-26	6	1.3	0.8	2	
2016 EUROPE-27	5	1.3	1.0	n/a	
2014 EUROPE-26	5	1.3	1.0	n/a	
2012 EUROPE-25	n/a	n/a	n/a	n/a	
2010 EUROPE-23	n/a	n/a	n/a	n/a	
2008 EUROPE-17	n/a	n/a	n/a	n/a	

TABLE 4-7
PROPORTION OF ARCHITECTS WHO HAVE SERIOUSLY CONSIDERED WORKING IN ANOTHER COUNTRY (LAST 12 MONTHS)

per cent / number	have seriously considered working in another country last 12 months (%)		architects part/wholly educated in different country (%)
	country inside Europe	country outside Europe	
Austria	10	3	24
Belgium	17	9	19
Croatia	27	7	20
Cyprus *	22	9	81
Czech Republic	16	3	31
Denmark	14	10	28
Estonia *	9	0	32
Finland	14	7	27
France	10	9	23
Germany	5	3	15
Greece	33	12	53
Hungary *	19	2	41
Ireland	12	7	39
Italy	27	14	12
Lithuania	28	8	18
Luxembourg *	14	0	78
Malta *	30	15	37
Netherlands	12	4	20
Norway	17	6	56
Poland *	n/a	n/a	19
Portugal	25	13	24
Romania	35	13	23
Slovenia *	24	9	26
Spain	24	13	27
Sweden	11	5	42
United Kingdom	21	12	21
2018 EUROPE-26	19	10	20
<i>2016 EUROPE-27</i>	36		18
<i>2014 EUROPE-26</i>	35		18
<i>2012 EUROPE-25</i>	35		n/a
<i>2010 EUROPE-23</i>	n/a		n/a
<i>2008 EUROPE-17</i>	n/a		n/a

* caution - small sample

CHART 4-11
ARCHITECTS WHO WERE AT LEAST PARTLY EDUCATED IN ANOTHER EUROPEAN COUNTRY COMPARED WITH ARCHITECTS WHO HAVE WORKED OR SERIOUSLY CONSIDERED WORKING IN ANOTHER EUROPEAN COUNTRY



More than half of all the architects who have undertaken at least part of their architectural studies outside their own country studied in five countries. And those same five countries, together with Switzerland, account for the destination of more than half of the architects who worked outside their own country in the last 12 months.

A comparison (chart 4-10) between the proportion of architects who studied in another country and have worked in another country highlights a small number of countries with high proportions of both. Luxembourg stands out as having high proportions of architects who have studied, and worked, in another country. Other countries with relatively high proportions of both include the Netherlands, Slovenia and Ireland.

CHART 4-12
RELATIONSHIP BETWEEN ARCHITECTS STUDYING AND WORKING IN ANOTHER COUNTRY
Selected countries have been labelled

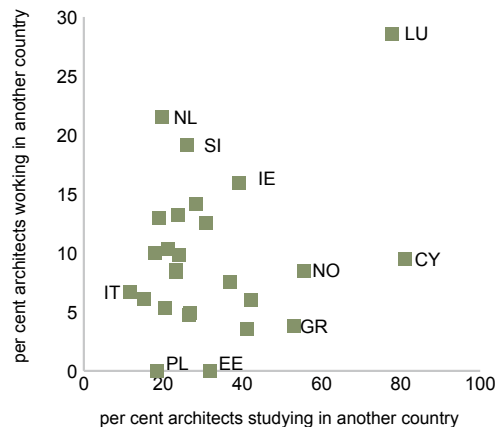


CHART 4-13
COUNTRIES OUTSIDE OWN COUNTRY IN WHICH ARCHITECTS HAVE STUDIED

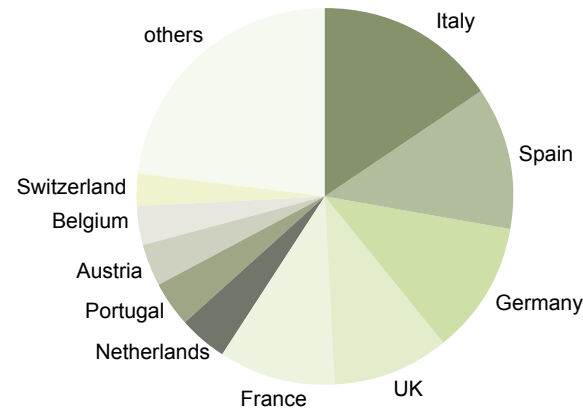


CHART 4-14
COUNTRIES OUTSIDE OWN COUNTRY IN WHICH ARCHITECTS HAVE WORKED IN LAST 12 MONTHS

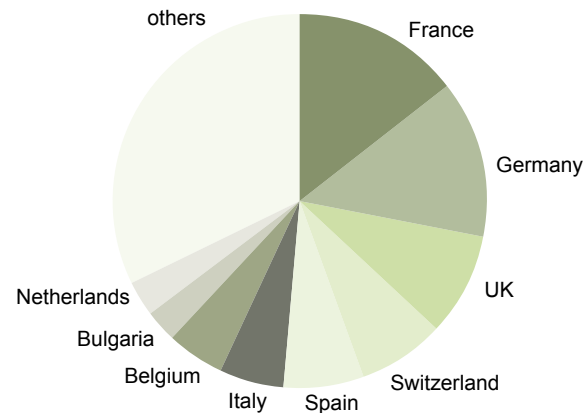


TABLE 4-8
COUNTRIES OUTSIDE OWN COUNTRY IN WHICH ARCHITECTS HAVE STUDIED OR WORKED

per cent of those who have studied or worked in another country*	studied	worked in last 12 months
Italy	15.7	5.7
Spain	12.1	6.7
Germany	11.3	13.6
United Kingdom	10.1	8.9
France	10.0	14.6
Netherlands	4.3	2.9
Portugal	3.7	1.9
Austria	3.5	1.4
Belgium	3.3	4.8
Switzerland	2.8	7.6
Greece	2.6	1.3
Sweden	2.5	2.4
Denmark	2.2	1.2
Finland	2.1	2.1
Poland	1.8	2.4
Ireland	1.6	2.1
Norway	1.4	2.3
Romania	1.2	0.8
Czech Republic	1.0	2.0
Bulgaria	0.8	3.0
Slovenia	0.7	0.3
Hungary	0.6	0.5
Croatia	0.4	1.1
Slovakia	0.3	1.6
Serbia	0.3	0.4
Bosnia	0.3	0.2
Estonia	0.3	0.2
Lithuania	0.3	0.1
Luxembourg	0.2	2.3
Malta	0.2	1.2
Cyprus	0.2	0.4
Latvia	0.2	0.5
Others	2.1	3.3

* per cent of ALL architects from countries responding to this survey who have studied / worked in each of these countries in last 12 months. Based on grossing-up survey results.

The biggest concern that architects have about working in another country is practical, personal or relocation issues. Nearly half of those who had not worked in another country in the last 12 months said this was a concern. About a third had concerns about language skills or were concerned that they had insufficient knowledge of planning or building regulations.

When split between those architects who had worked in another country in the past year, and those who had not, fewer of those who had worked had concerns. And more of those who had worked had no concerns at all. But architectural qualification issues and PII insurance were cited as a concern more often by those who had worked in another country compared with those who had not.

CHART 4-15
MAIN CONCERNS - WORKING IN ANOTHER COUNTRY

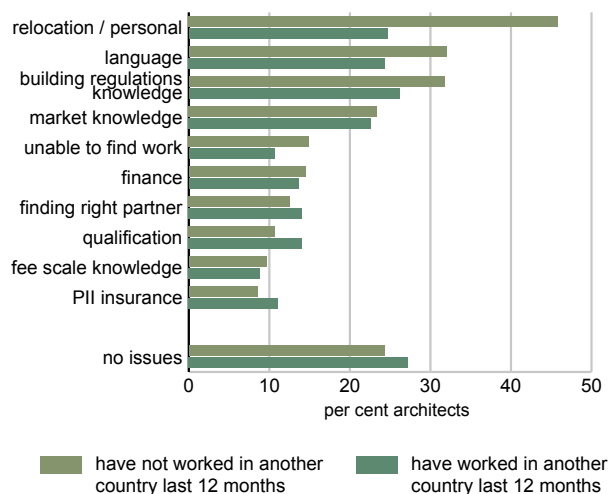


TABLE 4-9
MAIN CONCERNS ABOUT WORKING IN ANOTHER COUNTRY CITED BY ARCHITECTS WHO HAVE NOT WORKED IN ANOTHER COUNTRY

per cent	unable to find work	insufficient language skills	insufficient knowledge of planning / building regulations	architectural qualification issues	finding right architectural partner	finance	practical relocation or personal issues	knowledge of local market	knowledge of local fee scales / tariffs	PII cover for work in other European countries
Austria	7	15	42	8	18	15	40	36	16	10
Belgium	10	25	49	14	14	19	43	41	13	13
Croatia	10	28	49	15	16	13	51	29	10	5
Cyprus *	53	26	26	5	11	21	47	37	11	11
Czech Republic	7	48	57	8	16	10	32	32	11	15
Denmark	10	13	16	7	5	8	52	11	5	3
Estonia *	14	29	14	5	19	14	38	24	5	5
Finland	16	26	36	4	12	9	47	22	10	10
France	11	38	41	7	22	14	39	40	16	10
Germany	17	25	30	17	10	9	45	19	10	11
Greece	30	25	31	12	18	15	56	24	10	7
Hungary *	6	32	38	11	11	8	45	25	9	4
Ireland	10	33	30	10	9	13	46	27	16	7
Italy	7	39	24	5	10	20	58	17	5	4
Lithuania	13	49	54	8	20	16	34	41	15	15
Luxembourg *	10	0	25	10	15	10	30	35	10	5
Malta *	27	22	57	13	18	33	52	32	27	10
Netherlands	5	15	39	11	8	6	32	31	7	9
Norway	15	17	31	6	7	21	50	18	8	3
Poland *	30	36	55	18	25	11	21	54	29	0
Portugal	18	20	26	6	14	20	53	20	8	5
Romania	17	19	42	19	22	19	47	33	13	14
Slovenia *	26	29	47	8	3	8	55	24	8	5
Spain	29	38	38	15	14	11	28	25	10	13
Sweden	5	15	15	4	3	4	36	11	2	1
United Kingdom	23	39	38	13	12	16	40	30	16	16
2018 EUROPE-26	15	32	32	11	13	14	46	23	10	9
2016 EUROPE-27	25	36	38	16	n/a	n/a	46	29	12	11
2014 EUROPE-26	18	38	37	11	n/a	n/a	47	26	11	10
2012 EUROPE-25	19	39	35	11	n/a	n/a	66	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

* caution - small sample

2012/10/08 n/a = question was not asked

4.6 RETIREMENT

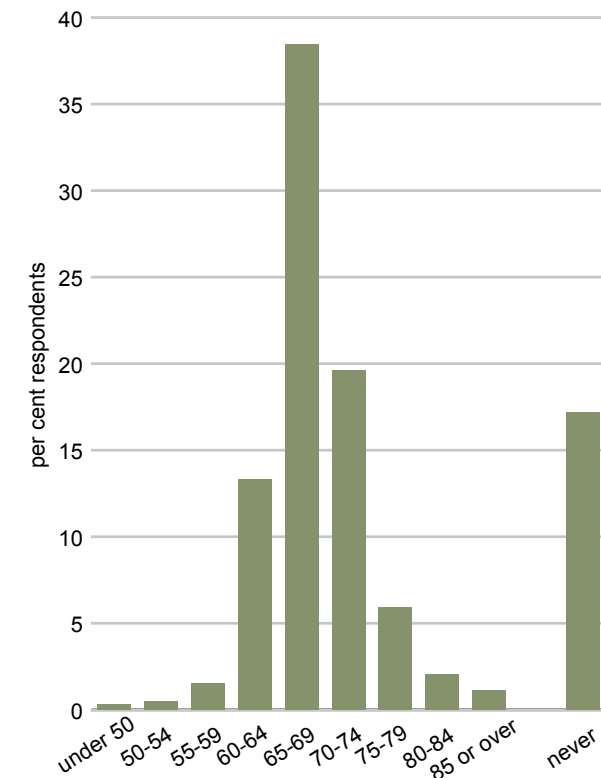
TABLE 4-10
AGE AT WHICH ARCHITECTS EXPECT TO RETIRE ANALYSED BY COUNTRY

per cent	under 50	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85 or over	never
Austria	0	0	1	7	35	29	9	3	2	14
Belgium	2	1	3	10	45	23	5	1	1	9
Croatia	1	1	3	26	31	9	4	1	2	21
Cyprus *	0	5	0	19	43	10	5	0	0	19
Czech Republic	0	0	0	14	29	17	6	3	1	29
Denmark	0	0	0	6	55	24	9	1	1	3
Estonia *	0	0	0	14	19	24	14	0	0	29
Finland	0	0	1	22	59	7	4	2	0	5
France	1	1	2	22	41	17	5	1	2	9
Germany	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Greece	0	0	1	11	52	16	3	2	1	14
Hungary *	0	0	5	20	41	7	5	2	2	18
Ireland	1	0	2	11	43	23	4	1	1	14
Italy	0	0	1	13	33	22	7	2	1	20
Lithuania	2	0	6	19	37	14	7	1	3	12
Luxembourg *	0	0	0	39	32	11	4	0	4	11
Malta *	0	5	5	21	44	8	2	2	3	12
Netherlands	1	0	1	7	44	21	7	2	1	15
Norway	0	0	0	4	51	33	6	2	2	3
Poland *	0	4	0	21	25	14	7	0	0	29
Portugal	1	1	2	12	39	13	5	2	3	22
Romania	2	2	4	22	26	13	5	2	2	23
Slovenia *	0	0	2	23	30	9	2	0	2	30
Spain	0	0	2	11	45	20	3	3	1	16
Sweden	0	0	1	14	64	15	1	1	1	3
United Kingdom	0	1	3	13	36	20	8	2	1	15
2018 EUR-26	0	1	2	13	38	20	6	2	1	17
2016 EUR-27	1	2	3	14	35	18	6	2	1	18
2014 EUR-26	1	1	2	15	38	15	6	2	1	19
2012 EUR-25	1	1	2	14	34	16	6	2	2	23
2010 EUR-23	2	3	5	20	37	13	4	1	1	14
2008 EUR-17	3	4	7	20	39	11	3	1	1	12

* caution - small sample

More architects, 38 per cent of the total, expect to retire at age 65 to 69 than any other age group. Sixteen per cent of architects plan to retire younger than 65. So, 54 per cent expect to have retired before the age of 70 - leaving 44 per cent retiring from age 70 onwards. A substantial proportion, 17 per cent, say they "never" expect to retire. The proportion of architects expecting to retire before age 65 has declined since the first survey in 2008, while the proportion expecting to retire from age 70 onwards has increased.

CHART 4-16
AGE AT WHICH ARCHITECTS EXPECT TO RETIRE





MIRZA & NACEY RESEARCH

More than two thirds of the profession will almost certainly continue to practice architecture until they retire. The proportion replying “definitely” or “probably” is 73 per cent, and this has remained fairly stable since 2012 - although it was a higher proportion in 2008 and 2010. The proportion who will “definitely” or “probably” remain working as an architect is over 90 per cent in Luxembourg, Austria, Estonia, Hungary and Finland.

CHART 4-17
LIKELIHOOD OF CONTINUING TO WORK AS AN ARCHITECT UNTIL RETIREMENT

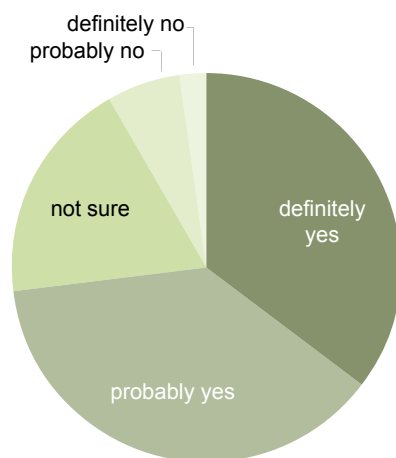


TABLE 4-11
WHETHER ARCHITECTS WILL CONTINUE TO PRACTICE THEIR PROFESSION UNTIL THEY RETIRE

per cent	definitely yes	probably yes	not sure	probably no	definitely no
Austria	59	33	6	1	1
Belgium	22	47	22	5	4
Croatia	41	44	11	3	1
Cyprus *	50	30	20	0	0
Czech Republic	48	38	12	1	0
Denmark	41	47	11	1	0
Estonia *	50	45	5	0	0
Finland	37	53	6	4	0
France	30	42	20	6	2
Germany	n/a	n/a	n/a	n/a	n/a
Greece	36	37	23	4	0
Hungary *	44	48	6	2	0
Ireland	35	54	9	2	0
Italy	31	35	23	8	3
Lithuania	47	36	12	2	3
Luxembourg *	65	35	0	0	0
Malta *	10	65	16	10	0
Netherlands	35	45	13	4	3
Norway	43	40	15	3	0
Poland *	35	42	15	8	0
Portugal	38	36	18	7	1
Romania	43	37	15	4	2
Slovenia *	60	21	19	0	0
Spain	40	31	20	7	2
Sweden	36	49	10	5	1
United Kingdom	42	41	10	5	2
2018 EUROPE-26	35	38	19	6	2
2016 EUROPE-27	36	37	19	6	2
2014 EUROPE-26	36	38	18	6	2
2012 EUROPE-25	35	39	18	6	2
2010 EUROPE-23	41	43	12	3	1
2008 EUROPE-17	39	42	13	4	2

* caution - small sample

4.7 HOURS WORKED

All staff groups report average working weeks in excess of 40 hours. The longest working week is worked by Sole Principals, at 48 hours per week. Partners & Directors work almost as many hours. Private practice salaried employees, freelance and other private architects work 4 hours less per week. Architects working in the public sector report the shortest working weeks, but their week still averages more than 40 hours. Average hours worked are very slightly higher, for all employment types, than in the 2016 survey.

Sole Principals in Germany, Belgium, Austria and Malta work, on average, more than 50 hours per week, as do Partners & Directors in Germany, Malta, Cyprus and the Czech Republic. Private practice salaried architects in Malta and Belgium work more hours than elsewhere. Government architects in Austria and Slovenia average more than 50 hours per week.

TABLE 4-12
DIFFERENCE BETWEEN AVERAGE HOURS
CONTRACTED TO WORK AND
AVERAGE HOURS WORKED

number of hours	difference between contracted and worked hours per week
sole principal	n/a
partner/director	n/a
private practice salaried employees	3.8
freelance	3.5
other private	5.1
local / central government	3.0
other public	3.9
2018 EUROPE-26	3.8
2016 EUROPE-27	5.0
2014 EUROPE-26	3.7
2012 EUROPE-25	3.9
2010 EUROPE-23	3.5
2008 EUROPE-17	4.9

TABLE 4-13
AVERAGE (MEAN) NUMBER OF HOURS WORKED PER WEEK
ANALYSED BY COUNTRY AND FIELD OF EMPLOYMENT

hours / week	sole principal	partner/ director	private practice salaried employees	freelance	other private	local / central government	other public
Austria	50.5	49.0	40.7	n/a	n/a	60.0	35.0
Belgium	51.3	49.1	46.4	44.8	45.8	40.0	44.3
Croatia	47.9	46.3	42.7	47.1	50.2	40.7	46.3
Cyprus *	41.4	55.0	44.2	50.0	50.0	42.0	n/a
Czech Republic	47.4	51.1	44.6	43.7	50.0	42.8	45.0
Denmark	44.3	45.6	39.8	35.0	40.1	36.5	36.9
Estonia *	44.0	49.0	39.2	48.8	45.5	n/a	n/a
Finland	44.3	44.6	39.0	35.0	41.4	40.0	41.4
France	48.3	45.5	43.9	46.8	48.1	42.0	43.8
Germany	51.1	50.1	44.2	47.3	45.0	42.6	43.8
Greece	48.6	48.0	42.9	46.7	44.3	39.8	46.4
Hungary *	44.7	46.3	43.3	50.0	37.3	40.0	44.0
Ireland	46.5	46.8	41.5	42.5	49.0	41.6	41.0
Italy	44.1	44.5	44.2	44.1	44.3	40.1	41.0
Lithuania	43.9	47.5	44.4	50.0	38.0	42.0	47.5
Luxembourg *	46.8	43.6	44.0	42.0	n/a	n/a	50.0
Malta *	53.4	56.3	48.6	n/a	44.6	45.2	46.0
Netherlands	45.7	45.5	44.0	42.6	45.5	42.9	45.1
Norway	40.5	42.5	40.0	41.0	43.4	39.4	42.4
Poland *	48.6	53.0	44.1	40.0	n/a	n/a	n/a
Portugal	45.6	42.9	43.3	43.1	45.6	37.8	39.1
Romania	46.5	44.3	43.0	44.7	45.0	46.7	49.0
Slovenia *	42.8	44.5	43.0	54.3	40.0	51.0	n/a
Spain	46.5	43.9	40.5	45.2	42.6	39.8	43.1
Sweden	44.7	43.2	41.0	36.5	40.0	41.1	42.7
United Kingdom	46.2	43.9	42.4	39.5	41.9	39.8	42.3
2018 EUROPE-26	48.2	47.7	43.6	44.8	44.8	41.2	41.9
2016 EUROPE-27	47.2	48.8	43.1	44.5	44.0	40.0	40.0
2014 EUROPE-26	44.5	45.3	43.9	42.9	44.0	40.3	41.0
2012 EUROPE-25	45.3	46.1	43.2	40.2	43.1	38.1	38.9
2010 EUROPE-23	46.2	45.8	41.2	43.9	44.8	38.3	38.4
2008 EUROPE-17	51.0	50.1	46.0	47.0	46.6	42.2	43.3

* caution - small sample

4.8 CONTINUING PROFESSIONAL DEVELOPMENT (CPD)

Architects in Europe spend an average of 20 hours per year undertaking CPD. This figure has remained relatively constant since 2014. Average CPD hours are highest in the UK, Austria and Hungary who undertake 30 or more hours of CPD. By contrast, architects in the Czech Republic, France and Malta average fewer than 10 hours a year, while in Portugal the average number of hours is zero.

The amount of money architects spend on CPD varies considerably across Europe. This is the money they spend personally and excludes CPD funded by their employer or business. The average personal expenditure is €150, but in some countries, expenditure is zero while in others, such as Luxembourg and Austria, architects spend €1000 per year undertaking CPD.

Sole Principals, Partners & Directors and government architects spend slightly more hours undertaking CPD than other architects. Those in the public sector spend less personally on CPD, on average, than private sector architects.

TABLE 4-14
CPD HOURS AND SPEND ANALYSED BY COUNTRY

	average (median) number hours CPD per year	average (median) personal expenditure on CPD € per year
Austria	30	1 000
Belgium	20	300
Croatia	10	0
Cyprus *	10	200
Czech Republic	8	78
Denmark	25	0
Estonia *	20	100
Finland	10	0
France	7	300
Germany	20	200
Greece	14	227
Hungary *	30	159
Ireland	40	0
Italy	25	200
Lithuania	10	100
Luxembourg *	11	1 000
Malta *	4	78
Netherlands	25	100
Norway	25	100
Poland *	15	0
Portugal	0	328
Romania	10	100
Slovenia *	10	86
Spain	16	50
Sweden	20	0
United Kingdom	35	0
2018 EUROPE-26	20	150
2016 EUROPE-27	24	300
2014 EUROPE-26	20	150
2012 EUROPE-25	38	300
2010 EUROPE-23	n/a	n/a
2008 EUROPE-17	n/a	n/a

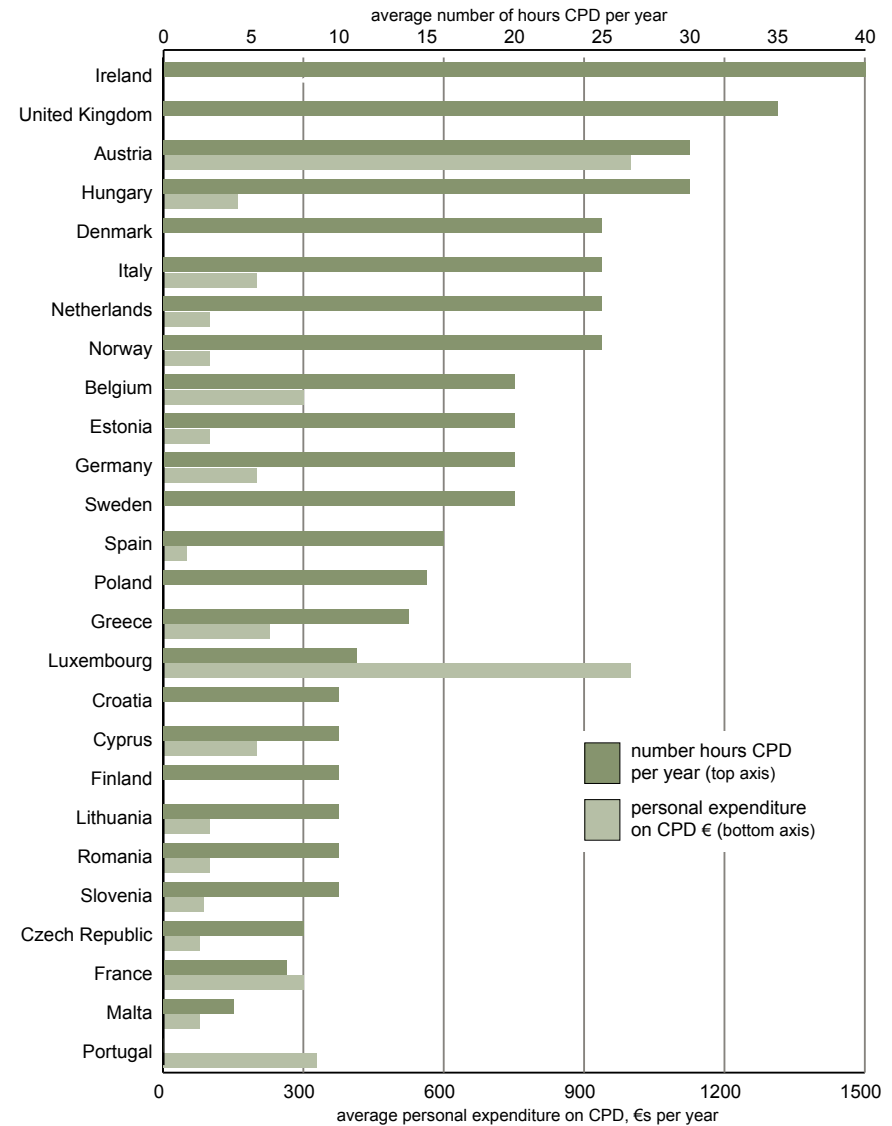
* caution small sample
2010/2008 n/a = question was not asked

TABLE 4-15
CPD HOURS AND SPEND ANALYSED BY FIELD OF EMPLOYMENT

	average (median) number hours CPD per year	average (median) personal expenditure on CPD € per year
sole principal	25	200
partner/director	24	195
private practice salaried employees	20	120
freelance	20	150
other private	20	200
local / central government	24	100
other public	22	58
2018 EUROPE-26	20	150
2016 EUROPE-27	24	300
2014 EUROPE-26	20	150
2012 EUROPE-25	38	300
2010 EUROPE-23*	n/a	n/a
2008 EUROPE-17*	n/a	n/a

2010/2008 n/a = question was not asked

CHART 4-18
CPD HOURS (TOP AXIS) AND SPEND (BOTTOM AXIS)
ANALYSED BY COUNTRY



4.9 BUILDING TO NEARLY ZERO ENERGY STANDARDS

TABLE 4-16
 PROPORTION OF PROJECTS ARCHITECTS ARE DESIGNING TO NEARLY ZERO ENERGY STANDARDS
 ANALYSED BY COUNTRY

per cent respondents	proportion of projects being designed to Nearly Zero Energy standards				
	less than 10%	between 10% and 25%	between 26% and 50%	between 51% and 99%	100%
Austria	38	15	13	27	7
Belgium	53	16	13	16	3
Croatia	78	10	7	4	1
Cyprus *	67	5	10	19	0
Czech Republic	57	13	13	12	5
Denmark	68	11	11	7	2
Estonia *	70	15	5	5	5
Finland	81	7	6	3	3
France	76	10	7	5	2
Germany	56	15	15	10	4
Greece	n/a	n/a	n/a	n/a	n/a
Hungary *	66	9	9	11	4
Ireland	71	11	6	11	1
Italy	73	11	8	6	2
Lithuania	74	6	8	8	4
Luxembourg *	29	4	21	29	18
Malta *	80	6	9	5	0
Netherlands	58	18	12	9	3
Norway	68	12	10	9	1
Poland *	89	7	0	0	4
Portugal	59	11	12	15	4
Romania	74	13	6	6	2
Slovenia *	71	13	9	4	2
Spain	80	7	4	6	3
Sweden	76	11	6	5	1
United Kingdom	82	9	6	3	1
2018 EUROPE-26	72	11	8	7	2
2016 EUROPE-27	65	14	10	7	4
2014 EUROPE-26	59	15	12	10	4
2012 EUROPE-25	53	20	14	9	3
2010 EUROPE-23	58	15	15	8	4
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a

* caution - small sample

Responses to this survey suggest that less work is being designed to Nearly Zero Energy standard than in previous years. In the previous surveys, between 12 and 14 per cent of respondents said that at least 50 per cent of projects they had worked on in the previous 12 months were being designed to Nearly Zero Energy standards; the 2018 figure is 11 per cent. More work in Luxembourg and Austria than anywhere else is being designed to Nearly Zero Energy standards.

CHART 4-19
 PROPORTION OF ARCHITECTS WHO ARE
 DESIGNING TO NEARLY ZERO ENERGY
 STANDARDS MORE THAN 50% OF THE TIME

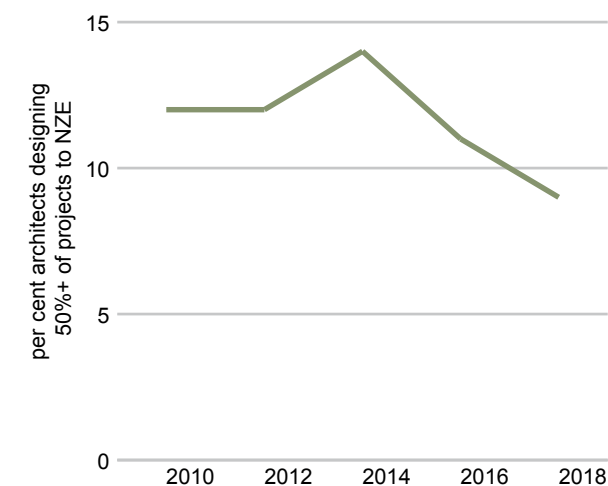


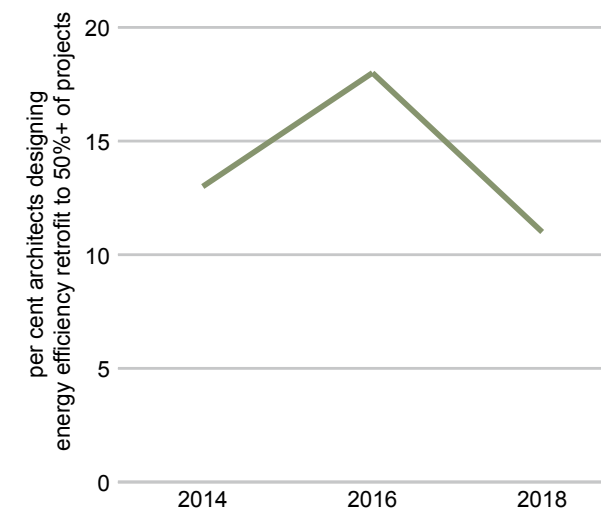
TABLE 4-17
HOW OFTEN ARCHITECTS ARE CURRENTLY BEING ASKED TO DESIGN ENERGY EFFICIENCY AS A RETROFIT SERVICE BY THEIR CLIENTS ANALYSED BY COUNTRY

per cent respondents	proportion of projects where energy efficiency is designed as a retrofit service				
	less than 10% of the time	between 10% and 25% of the time	between 26% and 50% of the time	between 51% and 99% of the time	always
Austria	43	24	17	13	4
Belgium	20	23	25	25	8
Croatia	56	17	12	10	5
Cyprus *	45	30	0	20	5
Czech Republic	57	27	12	3	2
Denmark	50	17	17	8	8
Estonia *	30	20	20	10	20
Finland	80	8	4	3	4
France	39	23	17	15	6
Germany	n/a	n/a	n/a	n/a	n/a
Greece	53	21	17	6	3
Hungary *	27	27	19	15	12
Ireland	49	17	13	14	7
Italy	69	14	10	5	2
Lithuania	62	10	14	5	9
Luxembourg *	29	18	18	21	14
Malta *	80	12	5	2	2
Netherlands	31	18	23	20	9
Norway	59	19	13	6	3
Poland *	79	7	14	0	0
Portugal	57	16	14	8	5
Romania	64	19	8	5	4
Slovenia *	30	11	23	23	14
Spain	75	9	8	3	4
Sweden	79	8	5	6	3
United Kingdom	61	17	10	7	4
2018 EUROPE-26	61	16	12	7	4
2016 EUROPE-27	50	18	13	12	6
2014 EUROPE-26	60	16	12	9	4
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17*	n/a	n/a	n/a	n/a	n/a

* caution small sample
 2008/10/12 n/a = question was not asked in previous surveys

Just as less work is being reported as being built to Nearly Zero Energy standards, fewer architects say they are being asked to design energy efficiency as a retrofit service by their clients. Although this question has only been asked twice before, the 2018 figures are the lowest. Eleven per cent of respondents say they are being asked more than 50 per cent of the time, compared with 18 per cent in 2016 and 13 per cent in 2014.

CHART 4-20
PROPORTION OF ARCHITECTS WHO ARE DESIGNING ENERGY EFFICIENCY AS A RETROFIT SERVICE MORE THAN 50% OF THE TIME



SECTION 2: COUNTRY PROFILES



House 1203
Place: Lamaca (Cyprus)
Architect: Simpraxis Architects
Photo: Marios Christodoulides

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MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	8 331 930	8 375 290	8 443 018	8 507 786	8 700 471	8 822 267
GDP PIB € m	283 085	279 607	300 712	313 067	339 896	369 899
GDP/PIB head/habitant €	33 976	33 385	35 617	36 798	39 066	41 928
Construction € m	37 131	35 830	39 574	47 832	46 745	58 318

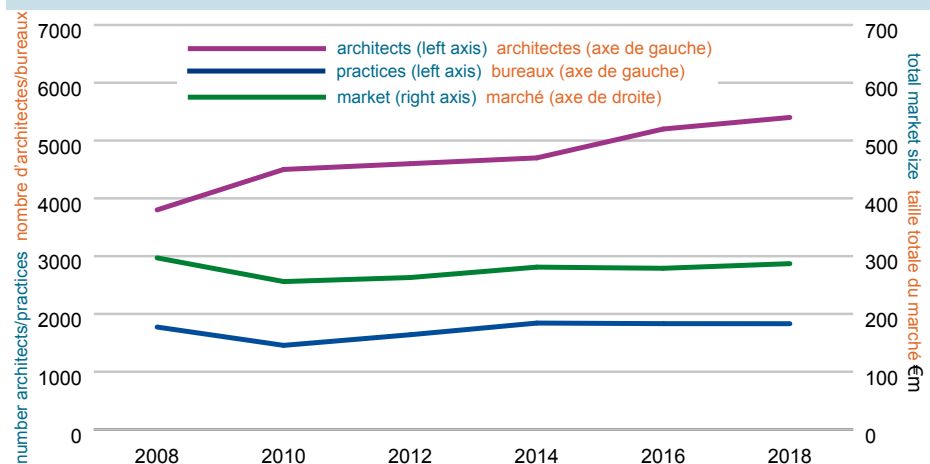
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	3 800	4 500	4 600	4 600	5 200	5 400
% Male Homme	85	84	82	82	80	78
% Female Femme	15	16	18	18	20	22
% <40 years <40 ans	24	17	18	20	14	12
Practices Bureaux	1 773	1 476	1 640	1 842	1 832	1 831

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	297	256	263	281	279	287
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	198 915	148 967	107 774	140 842	122 690	132 203
6 - 10 persons personnes	457 591	614 141	643 469	625 091	696 923	519 913

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	66	65	64	72	68	65
Partners & Directors Associé dirigeant	30	22	25	24	23	32
Private practice Salaried Salarié – Secteur privé	3	5	5	2	5	2
Private in-house L'industrie / commerce	0	1	0	0	0	0
Freelance Indépendant	0	2	2	2	1	1
Other Private Autres – Secteur privé	1	2	2	0	0	0
Local / central government Collectivité locale / gouvernement	0	1	1	0	0	0
Other Public Autre – secteur public	0	2	0	0	2	0

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	50 000	40 000	43 000	45 000	50 000	50 000
Partners & Directors Associé dirigeant	40 000	42 000	46 300	52 200	59 000	52 750
Private practice Salaried Salarié – Secteur privé	n/a	40 000	39 000	43 900	37 650	n/a
Private in-house L'industrie / commerce	n/a	40 000	42 000	n/a	n/a	n/a
Freelance Indépendant	n/a	52 500	65 000	31 500	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	105 000	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	45 000	n/a	n/a	n/a
Other Public Autre – secteur public	48 000	42 000	45 000	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	160	672	583	250	392	380
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-8	+/-4	+/-4	+/- 6	+/- 4.8	4.8



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	10 666 866	10 827 000	11 041 266	11 203 992	11 289 853	11 413 058
GDP PIB € m	345 006	349 122	369 836	382 692	409 407	439 052
GDP/PIB head/habitant €	32 344	32 246	33 496	34 157	36 263	38 469
Construction € m	56 278	53 699	56 135	66 969	75 711	69 845

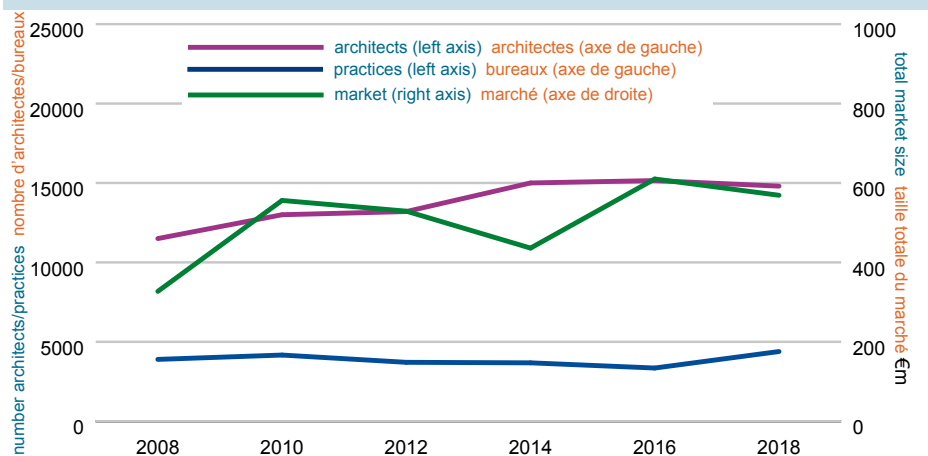
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	11 500	13 000	13 200	15 000	15 100	14 800
% Male Homme	76	76	72	73	72	68
% Female Femme	24	24	28	27	28	32
% <40 years <40 ans	54	45	54	45	36	47
Practices Bureaux	3 894	4 167	3 709	3 677	3 350	4 389

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	327	556	529	436	610	569
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	88 979	116 434	78 786	114 414	365 053	119 917
6 - 10 persons personnes	171 167	613 153	439 862	575 696	675 677	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	21	21	15	26	25	35
Partners & Directors Associé dirigeant	12	11	8	11	9	10
Private practice Salaried Salarié – Secteur privé	8	7	7	11	6	10
Private in-house L'industrie / commerce	0	0	0	0	0	1
Freelance Indépendant	22	25	30	22	20	37
Other Private Autres – Secteur privé	28	29	33	24	33	3
Local / central government Collectivité locale / gouvernement	6	2	3	2	4	1
Other Public Autre – secteur public	3	4	4	3	1	2

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	30 600	30 000	45 000	35 000	40 000	40 000
Partners & Directors Associé dirigeant	24 000	45 000	45 000	45 000	47 400	40 000
Private practice Salaried Salarié – Secteur privé	24 000	40 000	47 500	36 000	50 000	38 000
Private in-house L'industrie / commerce	30 000	30 000	29 850	n/a	n/a	n/a
Freelance Indépendant	31 000	30 000	30 000	28 000	32 330	34 000
Other Private Autres – Secteur privé	28 500	41 891	41 250	30 000	35 000	n/a
Local / central government Collectivité locale / gouvernement	n/a	45 000	35 000	32 000	41 000	n/a
Other Public Autre – secteur public	30 000	32 330	31 700	40 900	40 852	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	318	756	446	815	496	176
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-5	+/-3	+/-4.6	+/- 3.3	+/- 4.3	7.3

Belgique



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Bulgaria

Bulgaria

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	7 640 238	7 563 710	7 327 224	7 245 677	7 153 784	7 050 034
GDP PIB € m	35 431	35 558	38 483	39 940	45 287	51 663
GDP/PIB head/habitant €	4 637	4 701	5 252	5 512	6 330	7 328
Construction € m	6 562	3 258	4 859	6 608	7 067	6 775

Architectural Profession Profession d'architecte

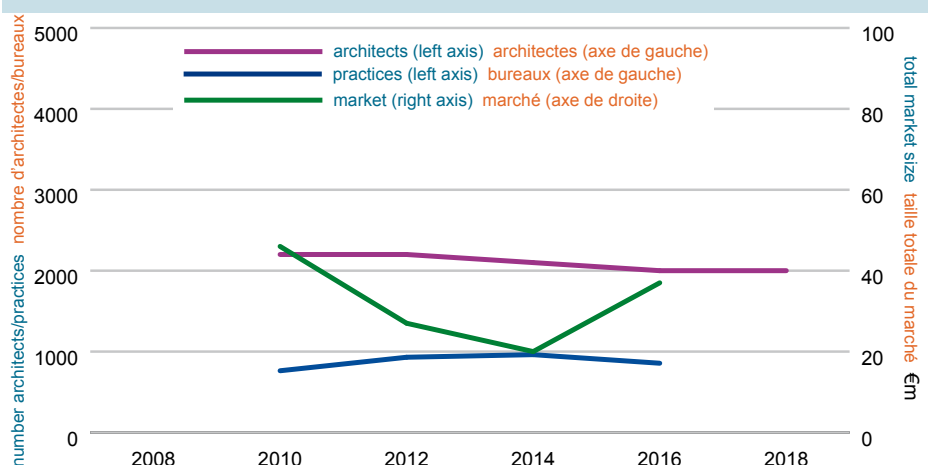
	2008	2010	2012	2014	2016	2018
Architects Architectes	n/a	2 200*	2 200*	2 100*	2 000	2 000
% Male Homme	n/a	50	45	47	46	n/a
% Female Femme	n/a	50	55	53	54	n/a
% <40 years <40 ans	n/a	45	41	46	45	n/a
Practices Bureaux	n/a	763	930	962	856	n/a

* revised * révisé

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	46	27	20	37	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	52 452	17 783	30 893	39 276	n/a
6 - 10 persons personnes	n/a	92 183	76 255	38 343	n/a	n/a

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	33	36	24	36	n/a
Partners & Directors Associé dirigeant	n/a	9	10	12	7	n/a
Private practice Salaried Salarié – Secteur privé	n/a	37	36	43	29	n/a
Private in-house L'industrie / commerce	n/a	0	1	0	0	n/a
Freelance Indépendant	n/a	15	8	6	16	n/a
Other Private Autres – Secteur privé	n/a	3	1	4	3	n/a
Local / central government Collectivité locale / gouvernement	n/a	1	5	12	5	n/a
Other Public Autre – secteur public	n/a	1	5	0	4	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	7 671	12 271	10 225	5 427	n/a
Partners & Directors Associé dirigeant	n/a	20 455	14 000	3 476	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	6 204	4 908	3 460	1 942	n/a
Private in-house L'industrie / commerce	n/a	5 881	6 135	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	4 602	7 669	6 130	n/a
Other Private Autres – Secteur privé	n/a	n/a	2 045	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	2 211	5 317	4 291	n/a
Other Public Autre – secteur public	n/a	7 671	6 135	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	141	283	83	147	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-8	+/-5.5	+/- 10.6	+/- 7.9	n/a

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	4 435 383	4 425 747	4 398 150	4 246 700	4 190 669	4 105 493
GDP PIB € m	47 365	45 779	44 892	43 128	43 847	48 990
GDP/PIB head/habitant €	10 679	10 344	10 207	10 156	10 463	11 933
Construction € m	n/a	n/a	n/a	n/a	6 207	6 046

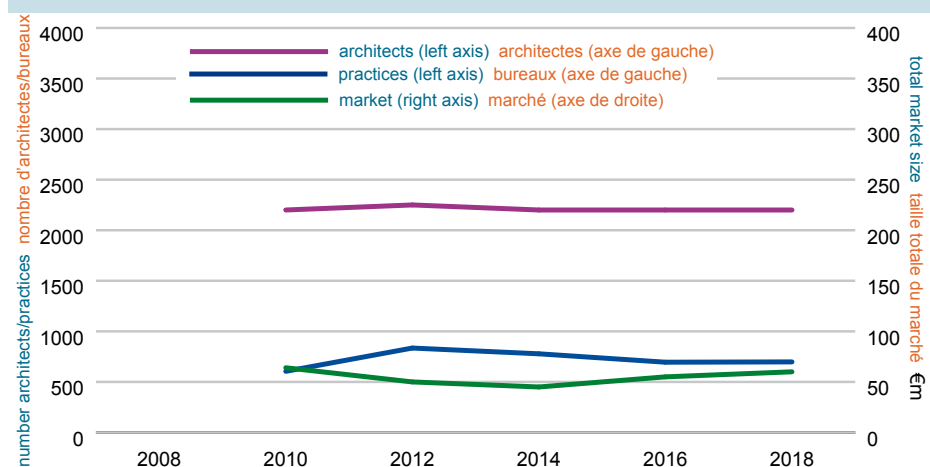
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	n/a	2 200	2 250	2 200	2 200	2 200
% Male Homme	n/a	44	45	47	41	46
% Female Femme	n/a	56	55	53	59	54
% <40 years <40 ans	n/a	31	31	44	40	33
Practices Bureaux	n/a	605	835	778	695	698

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	64	50	45	55	60
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	66 379	74 660	51 000	110 403	56 610
6 - 10 persons personnes	n/a	218 190	160 050	157 775	141 135	52 3748

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	24	25	25	15	15
Partners & Directors Associé dirigeant	n/a	19	21	21	21	32
Private practice Salaried Salarié – Secteur privé	n/a	39	36	42	39	38
Private in-house L'industrie / commerce	n/a	2	0	0	2	1
Freelance Indépendant	n/a	5	3	1	4	3
Other Private Autres – Secteur privé	n/a	2	2	2	3	1
Local / central government Collectivité locale / gouvernement	n/a	4	4	5	7	3
Other Public Autre – secteur public	n/a	4	8	4	9	7

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	13 746	12 087	15 777	10 392	9 718
Partners & Directors Associé dirigeant	n/a	14 090	11 594	12 293	9 985	13 227
Private practice Salaried Salarié – Secteur privé	n/a	16 152	14 675	11 044	12 498	11 337
Private in-house L'industrie / commerce	n/a	15 464	10 940	n/a	19 304	n/a
Freelance Indépendant	n/a	15 121	16 010	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	15 945	14 142	n/a	15 044	n/a
Local / central government Collectivité locale / gouvernement	n/a	15 670	19 212	14 507	13 047	20 245
Other Public Autre – secteur public	n/a	14 433	13 341	n/a	17 680	6 748

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	404	423	93	318	305
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-4	+/-4.3	+/- 9.9	+/- 5.1	5.2



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	776 333	819 140	862 011	858 000	848 319	864 236
GDP PIB € m	19 006	19 300	19 467	17 567	17 637	19 571
GDP/PIB head/habitant €	24 482	23 561	22 583	20 474	20 791	22 645
Construction € m	5 280	3 930	2 786	1 832	2 056	2 490

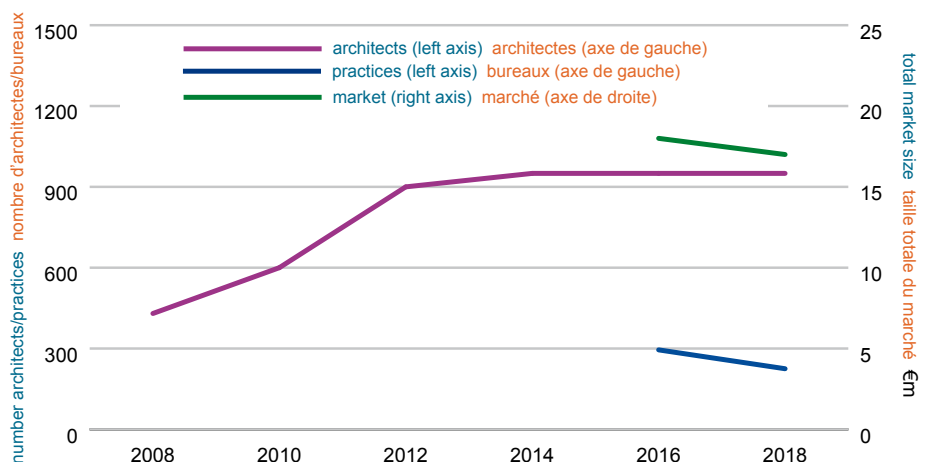
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	430	600	900	950	950	950
% Male Homme	n/a	n/a	n/a	n/a	54	80
% Female Femme	n/a	n/a	n/a	n/a	46	20
% <40 years <40 ans	n/a	n/a	n/a	n/a	58	50
Practices Bureaux	n/a	n/a	n/a	n/a	295	225

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	n/a	n/a	n/a	18	17
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	n/a	n/a	n/a
6 - 10 persons personnes	n/a	n/a	n/a	n/a	150 000	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	30	29
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	9	29
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	34	29
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	2	5
Freelance Indépendant	n/a	n/a	n/a	n/a	9	5
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	6	0
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	4	5
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	7	0

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	15 000	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a	42 500
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	1 900	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	n/a	n/a	n/a	59	21
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	n/a	+/- 12.4	21.2

Chypre



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	10 381 130	10 506 813	10 504 203	10 512 419	10 553 843	10 610 055
GDP PIB € m	147 879	145 955	154 913	149 491	166 964	191 643
GDP/PIB head/habitant €	14 245	13 891	14 748	14 220	15 820	18 062
Construction € m	34 510	28 987	27 124	27 514	23 658	31 278

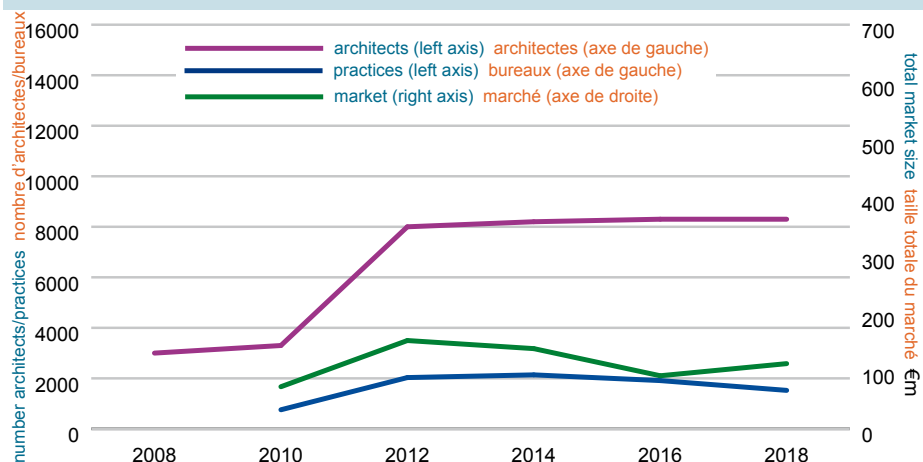
Architectural Profession Profession d'architecte * 2012 data revised

	2008	2010	2012	2014	2016	2018
Architects Architectes	3 000	3 300	8 000*	8 200	8 300	8 300
% Male Homme	n/a	70	68	62	64	78
% Female Femme	n/a	30	32	38	36	22
% <40 years <40 ans	n/a	25	29	46	52	32
Practices Bureaux	n/a	756	2 031	2 138	1 912	1 524

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	73	153	139	92	113
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	48 487	57 967	n/a	n/a	n/a
6 - 10 persons personnes	n/a	380 286	259 958	n/a	n/a	156 584

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	32	30	8	31	32
Partners & Directors Associé dirigeant	n/a	9	8	17	5	7
Private practice Salaried Salarié – Secteur privé	n/a	21	30	42	15	24
Private in-house L'industrie / commerce	n/a	0	0	0	0	0
Freelance Indépendant	n/a	31	27	17	37	28
Other Private Autres – Secteur privé	n/a	1	1	8	5	1
Local / central government Collectivité locale / gouvernement	n/a	4	3	0	2	5
Other Public Autre – secteur public	n/a	3	1	8	5	3

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	14 570	18 107	n/a	11 089	13 826
Partners & Directors Associé dirigeant	n/a	19 427	26 154	n/a	n/a	25 315
Private practice Salaried Salarié – Secteur privé	n/a	15 271	14 485	4 915	12 531	19 473
Private in-house L'industrie / commerce	n/a	14 165	13 294	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	12 011	n/a	6 653	17 526
Other Private Autres – Secteur privé	n/a	16 998	14 485	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	14 570	14 888	n/a	n/a	24 146
Other Public Autre – secteur public	n/a	15 015	14 888	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	488	446	13	59	153
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-4	+/-4.3	+/- 27.2	+/- 12.7	7.8

Rép Tchèque



Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	5 475 791	5 534 738	5 580 516	5 627 235	5 707 251	5 781 190
GDP PIB € m	233 482	228 371	239 245	248 975	266 179	288 981
GDP/PIB head/habitant €	42 639	41 261	42 871	44 245	46 639	49 986
Construction € m	30 510	20 518	24 924	25 364	31 242	33 425

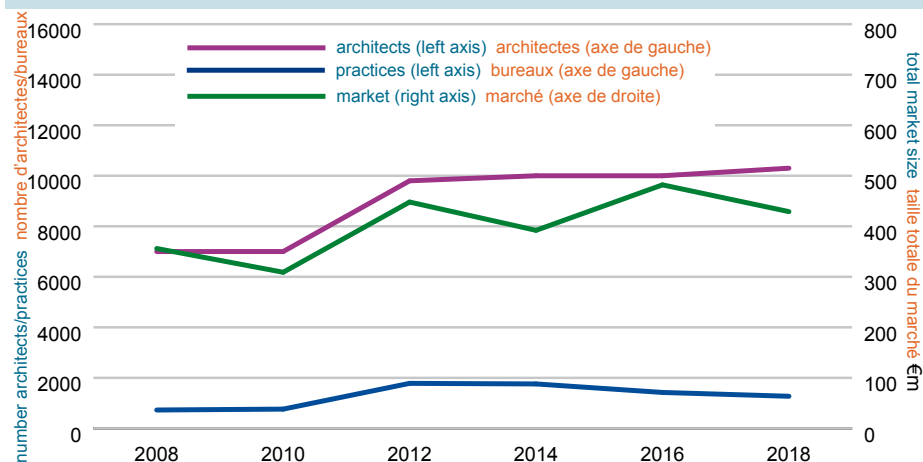
Architectural Profession Profession d'architecte * 2012 data revised

	2008	2010	2012	2014	2016	2018
Architects Architectes	7 000	7 000	9 800*	10 000	10 000	10 300
% Male Homme	51	56	56	50	54	56
% Female Femme	49	44	44	50	46	44
% <40 years <40 ans	40	33	27	26	28	26
Practices Bureaux	727	762	1 782	1 759	1 422	1 271

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	356	309	448	392	482	429
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	291 700	129 768	160 624	151 768	160 743	n/a
6 - 10 persons personnes	566 330	1 138 352	771 921	n/a	1 004 374	n/a

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	11	12	12	8	11	11
Partners & Directors Associé dirigeant	7	16	13	9	10	9
Private practice Salaried Salarié – Secteur privé	32	26	29	34	33	32
Private in-house L'industrie / commerce	4	2	2	2	1	3
Freelance Indépendant	2	3	1	1	2	2
Other Private Autres – Secteur privé	10	7	8	5	14	9
Local / central government Collectivité locale / gouvernement	24	23	25	26	19	24
Other Public Autre – secteur public	10	12	10	15	10	10

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	67 150	60 449	62 513	53 590	51 051	61 513
Partners & Directors Associé dirigeant	53 720	67 165	69 907	80 385	84 502	77 847
Private practice Salaried Salarié – Secteur privé	53 720	48 359	60 496	53 858	50 782	59 190
Private in-house L'industrie / commerce	n/a	19 478	30 961	n/a	n/a	n/a
Freelance Indépendant	46 736	13 433	64 664	93 783	21 600	n/a
Other Private Autres – Secteur privé	53 720	54 538	53 774	62 762	50 651	80 531
Local / central government Collectivité locale / gouvernement	30 218	56 419	63 050	56 270	52 797	48 117
Other Public Autre – secteur public	53 720	54 721	60 496	64 308	55 753	69 799

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	159	454	743	529	459	247
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-8	+/-4	+/-3.4	+/- 4.1	+/- 4.5	6.2



Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	1 340 935	1 340 127	1 339 662	1 315 819	1 315 944	1 319 133
GDP PIB € m	16 107	13 846	15 951	18 613	20 252	23 615
GDP/PIB head/habitant €	12 012	10 332	11 907	14 146	15 389	17 902
Construction € m	3 322	1 843	2 572	3 208	2 768	4 574

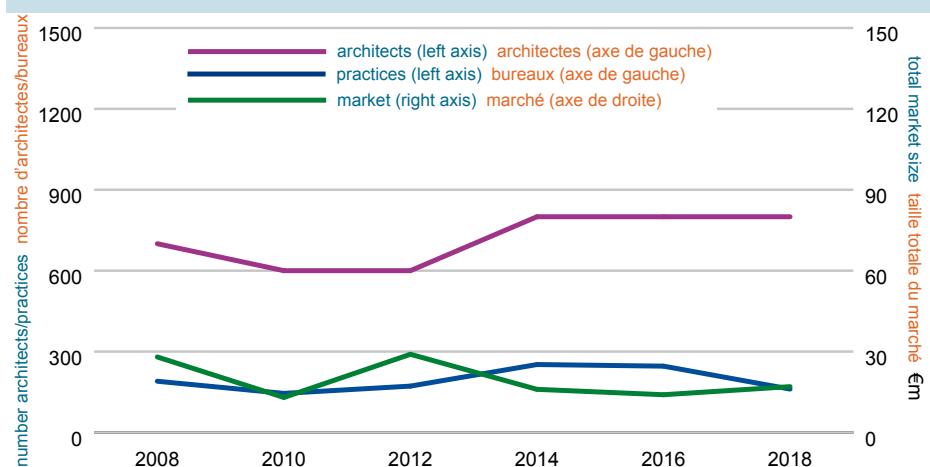
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	700	600	600	800	800	800
% Male Homme	84	67	69	85	73	74
% Female Femme	16	33	31	15	27	26
% <40 years <40 ans	36	29	12	30	32	19
Practices Bureaux	190	145	172	252	246	161

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	28	13	29	16	14	17
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	57 574	31 250	n/a	n/a
6 - 10 persons personnes	322 500	n/a	116 288	221 324	280 000	n/a

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	16	28	26	35	15	27
Partners & Directors Associé dirigeant	56	9	21	29	36	9
Private practice Salaried Salarié – Secteur privé	20	41	47	35	27	41
Private in-house L'industrie / commerce	0	0	0	0	0	0
Freelance Indépendant	4	6	5	0	4	9
Other Private Autres – Secteur privé	4	3	0	0	0	5
Local / central government Collectivité locale / gouvernement	0	9	2	0	4	9
Other Public Autre – secteur public	0	3	0	0	15	0

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	41 280	n/a	7 200	35 500	n/a	n/a
Partners & Directors Associé dirigeant	25 800	n/a	20 000	13 000	22 000	n/a
Private practice Salaried Salarié – Secteur privé	n/a	11 504	13 500	17 750	15 000	18 100
Private in-house L'industrie / commerce	n/a	n/a	10 000	n/a	n/a	n/a
Freelance Indépendant	n/a	15 786	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	25 800	11 504	10 080	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	25	33	51	20	55	23
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-19	+/-17	+/-13.1	+/- 21.7	+/- 12.8	20.2



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	5 300 484	5 351 427	5 401 267	5 451 270	5 487 308	5 513 130
GDP PIB € m	184 649	176 132	189 368	193 443	209 149	223 843
GDP/PIB head/habitant €	34 836	32 913	35 060	35 486	38 115	40 602
Construction € m	32 229	32 298	33 922	30 292	30 558	33 745

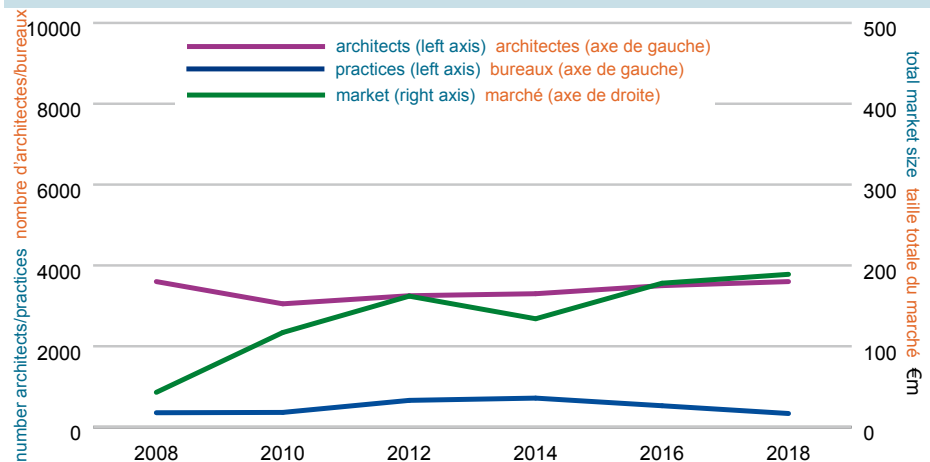
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	3 600	3 050	3 250	3 300	3 500	3 600
% Male Homme	50	56	54	53	47	48
% Female Femme	50	44	46	47	53	52
% <40 years <40 ans	32	26	27	20	25	19
Practices Bureaux	355	363	661	717	528	336

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	43	117	162	134	178	189
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	70 000	164 423	131 209	155 000	173 545	n/a
6 - 10 persons personnes	350 000	501 783	629 257	1 082 500	701 972	600 778

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	12	15	13	15	12	9
Partners & Directors Associé dirigeant	12	14	11	5	9	7
Private practice Salaried Salarié – Secteur privé	31	29	40	39	38	43
Private in-house L'industrie / commerce	1	1	1	1	0	1
Freelance Indépendant	2	2	0	1	1	0
Other Private Autres – Secteur privé	8	3	3	5	4	5
Local / central government Collectivité locale / gouvernement	25	26	21	26	25	9
Other Public Autre – secteur public	8	11	11	9	11	25

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	35 000	45 000	50 000	49 500	54 500	77 500
Partners & Directors Associé dirigeant	49 250	52 000	70 000	80 000	74 000	90 000
Private practice Salaried Salarié – Secteur privé	36 000	42 500	42 500	45 500	45 750	50 000
Private in-house L'industrie / commerce	n/a	25 000	n/a	n/a	n/a	n/a
Freelance Indépendant	36 500	44 000	36 600	n/a	n/a	n/a
Other Private Autres – Secteur privé	45 000	47 000	49 000	50 250	55 900	74 100
Local / central government Collectivité locale / gouvernement	42 500	46 250	52 000	50 750	50 000	52 500
Other Public Autre – secteur public	39 600	45 000	48 000	53 000	54 000	50 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	203	560	384	411	418	271
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-7	+/-4	+/-4.7	+/- 4.5	+/- 4.5	5.7

Finlande



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	63 753 140	64 713 762	65 397 912	65 856 609	66 661 621	67 221 943
GDP PIB € m	1 948 511	1 946 564	1 996 583	2 059 852	2 181 064	2 291 705
GDP/PIB head/habitant €	30 563	30 080	30 530	31 278	32 718	34 092
Construction € m	262 849	245 485	241 930	271 139	282 377	276 669

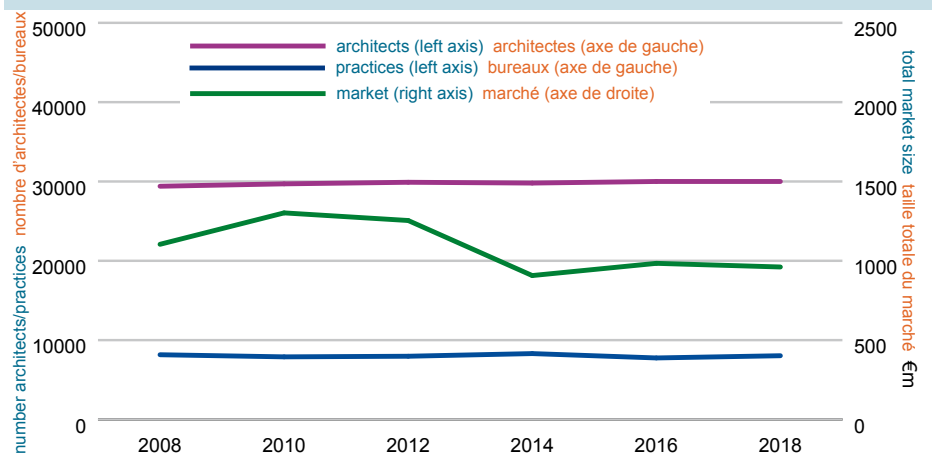
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	29 400	29 700	29 900	29 800	30 000	30 000
% Male Homme	44	73	67	62	64	63
% Female Femme	56	27	33	38	36	37
% <40 years <40 ans	47	29	30	24	34	25
Practices Bureaux	8 157	7 891	7 968	8 302	7 753	8 033

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	1 104	1 302	1 254	908	984	961
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	138 158	196 787	169 294	177 150	120 936	117 254
6 - 10 persons personnes	698 573	774 945	883 467	812 891	837 225	696 475

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	23	28	26	29	26	37
Partners & Directors Associé dirigeant	5	5	5	6	6	6
Private practice Salaried Salarié – Secteur privé	18	16	17	20	17	18
Private in-house L'industrie / commerce	1	0	0	1	0	0
Freelance Indépendant	25	21	20	19	27	28
Other Private Autres – Secteur privé	24	23	26	20	18	5
Local / central government Collectivité locale / gouvernement	2	2	3	2	3	2
Other Public Autre – secteur public	4	4	4	3	2	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	29 000	30 000	30 000	30 000	25 000	30 000
Partners & Directors Associé dirigeant	42 000	33 000	42 000	45 000	39 022	38 164
Private practice Salaried Salarié – Secteur privé	46 800	39 000	38 000	30 000	41 432	36 000
Private in-house L'industrie / commerce	35 000	28 000	25 000	n/a	n/a	n/a
Freelance Indépendant	37 200	32 250	32 500	22 474	24 000	27 000
Other Private Autres – Secteur privé	n/a	41 400	37 200	30 500	26 000	41 000
Local / central government Collectivité locale / gouvernement	n/a	36 600	47 714	40 500	41 500	45 000
Other Public Autre – secteur public	36 000	33 000	30 250	42 030	34 650	43 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	142	1 202	957	690	1 018	1 551
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-8	+/-2	+/- 3.1	+/- 3.7	+/- 3.0	2.4

France



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	82 221 808	81 802 257	81 843 743	80 780 000	82 162 000	82 850 000
GDP PIB € m	2 481 200	2 432 382	2 592 600	2 737 600	3 032 820	3 277 340
GDP/PIB head/habitant €	30 177	29 735	31 677	33 890	36 913	39 558
Construction € m	217 350	225 973	247 633	250 337	279 619	306 168

Architectural Profession Profession d'architecte

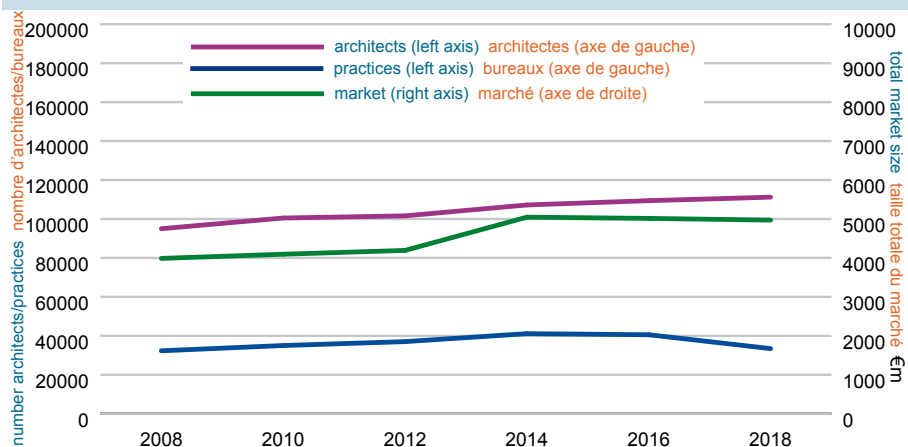
	2008	2010	2012	2014	2016*	2018*
Architects Architectes	95 000	100 500	101 600	107 200	109 200	111 200
% Male Homme	71	79	64	57	66	62
% Female Femme	29	21	36	43	34	38
% <40 years <40 ans	31	14	35	41	23	21
Practices Bureaux	32 311	35 021	37 026	41 117	40 558	33 440

* 2016& 2018 - source: BAK survey * 2016 & 2018 - source: enquête BAK

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	3 988	4 095	4 193	5 047	5 015	4 971
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	88 458	86 449	94 088	114 326	154 763	181 955
6 - 10 persons personnes	406 027	633 444	440 416	623 935	654 293	786 041

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016*	2018*
Sole Principals Dirigeant unique	40	62	32	20	27	24
Partners & Directors Associé dirigeant	14	10	14	8	10	10
Private practice Salaried Salarié – Secteur privé	20	14	26	40	33	34
Private in-house L'industrie / commerce	5	3	7	8	12	14
Freelance Indépendant	3	3	4	1	4	2
Other Private Autres – Secteur privé	7	2	6	6	n/a	1
Local / central government Collectivité locale / gouvernement	7	2	8	12	14	14
Other Public Autre – secteur public	4	2	4	4		1

* 2016& 2018 - source: BAK survey * 2016 & 2018 - source: enquête BAK

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016**	2018**
Sole Principals Dirigeant unique	40 000	43 500	50 000	55 000	55 940	63 202
Partners & Directors Associé dirigeant	46 300	50 000	60 000	70 660	65 100	74 500
Private practice Salaried Salarié – Secteur privé	36 000	34 290	37 200	36 000	n/a	48 000
Private in-house L'industrie / commerce	35 000	25 000	40 000	n/a	n/a	72 000
Freelance Indépendant	48 000	50 000	54 500	67 000	39 012	40 000
Other Private Autres – Secteur privé	45 000	42 976	50 000	58 500	n/a	61 331
Local / central government Collectivité locale / gouvernement	50 500	48 100	50 000	53 000	n/a	60 397
Other Public Autre – secteur public	40 000	42 488	48 000	55 000	n/a	65 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

** 2016& 2018 - source: BAK survey ** 2016 & 2018 - source: enquête BAK

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	3 460	393	840	1 392	6 029	13 120
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-2	+/-5	+/- 3.4	+/- 2.6	+/- 1.2	0.8

Allemagne



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	11 214 992	11 295 002	11 290 785	10 992 589	10 793 526	10 738 868
GDP PIB € m	235 679	232 767	215 088	182 054	175 697	180 218
GDP/PIB head/habitant €	21 015	20 608	19 050	16 562	16 278	16 782
Construction € m	26 689	19 573	12 110	10 927	12 926	9621

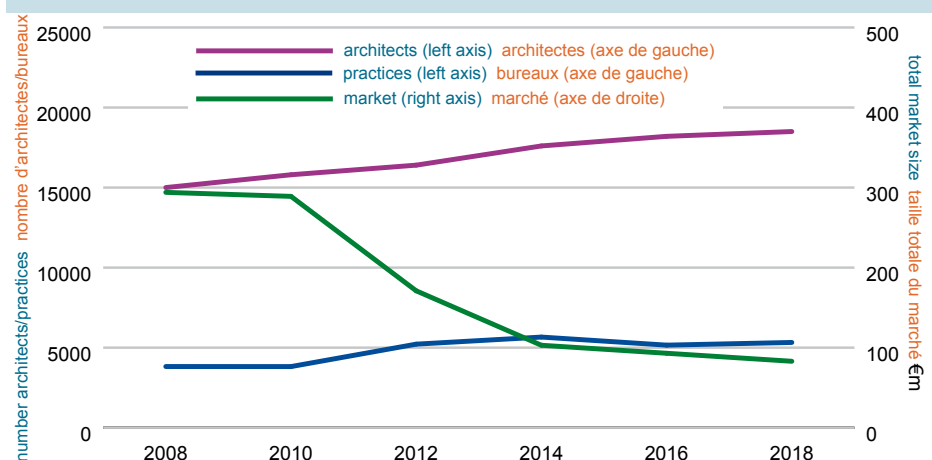
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	15 000	15 800	16 400	17 600	18 200	18 500
% Male Homme	48	43	41	42	n/a	45
% Female Femme	52	57	59	58	n/a	55
% <40 years <40 ans	53	52	56	50	n/a	39
Practices Bureaux	3 821	3 818	5 219	5 661	n/a	5 325

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	294	289	171	103	n/a	83
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	33 612	50 720	33 861	18 929	n/a	18 833
6 - 10 persons personnes	284 625	190 067	71 500	55 643	n/a	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	14	49	56	51	n/a	44
Partners & Directors Associé dirigeant	15	5	6	6	n/a	2
Private practice Salaried Salarié – Secteur privé	19	17	14	16	n/a	21
Private in-house L'industrie / commerce	1	0	0	1	n/a	0
Freelance Indépendant	23	9	6	9	n/a	10
Other Private Autres – Secteur privé	7	3	3	2	n/a	3
Local / central government Collectivité locale / gouvernement	8	10	7	8	n/a	11
Other Public Autre – secteur public	14	7	8	8	n/a	7

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	30 000	30 000	20 000	12 000	n/a	10 000
Partners & Directors Associé dirigeant	30 000	42 500	22 500	30 000	n/a	n/a
Private practice Salaried Salarié – Secteur privé	18 000	14 700	13 200	13 200	n/a	13 500
Private in-house L'industrie / commerce	20 000	13 100	10 000	n/a	n/a	n/a
Freelance Indépendant	22 500	n/a	13 200	10 000	n/a	7 500
Other Private Autres – Secteur privé	21 500	20 000	19 000	13 500	n/a	n/a
Local / central government Collectivité locale / gouvernement	30 083	20 000	20 000	21 600	n/a	15 000
Other Public Autre – secteur public	24 000	20 000	18 000	19 320	n/a	15 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	394	314	490	344	n/a	299
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-5	+/-6	+/- 4.4	+/- 5.2	n/a	5.6

Greece
Grèce



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	10 045 401	10 013 000	9 962 000	9 879 000	9 830 485	9 778 371
GDP PIB € m	105 545	97 095	100 513	97 948	109 674	124 050
GDP/PIB head/habitant €	10 507	9 697	10 090	9 915	11 157	12 686
Construction € m	10 625	8 131	7 496	8 520	7 559	14 655

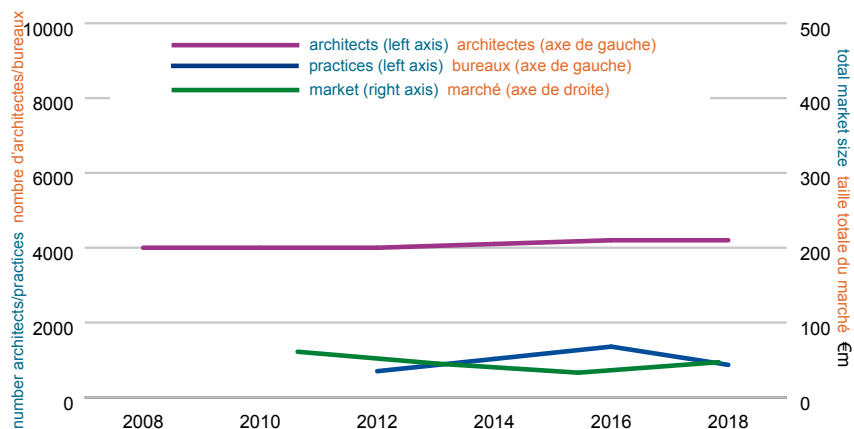
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	4 000	4 000	4 000	4 100	4 200	4 200
% Male Homme	n/a	n/a	67	n/a	72	75
% Female Femme	n/a	n/a	33	n/a	28	25
% <40 years <40 ans	n/a	n/a	27	n/a	25	n/a
Practices Bureaux	n/a	n/a	699	n/a	1 356	869

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	n/a	61	n/a	33	47
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	17 311	n/a	32 253	30 442
6 - 10 persons personnes	n/a	n/a	146 850	n/a	n/a	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	25	n/a	5	14
Partners & Directors Associé dirigeant	n/a	n/a	9	n/a	1	7
Private practice Salaried Salarié – Secteur privé	n/a	n/a	27	n/a	19	50
Private in-house L'industrie / commerce	n/a	n/a	5	n/a	1	2
Freelance Indépendant	n/a	n/a	8	n/a	11	13
Other Private Autres – Secteur privé	n/a	n/a	3	n/a	39	4
Local / central government Collectivité locale / gouvernement	n/a	n/a	12	n/a	13	5
Other Public Autre – secteur public	n/a	n/a	11	n/a	12	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	8 021	n/a	12 819	n/a
Partners & Directors Associé dirigeant	n/a	n/a	7 528	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	7 810	n/a	10 896	11 476
Private in-house L'industrie / commerce	n/a	n/a	6 332	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	14 072	n/a	n/a	24 226
Other Private Autres – Secteur privé	n/a	n/a	12 664	n/a	9 614	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	10 554	n/a	11 537	n/a
Other Public Autre – secteur public	n/a	n/a	8 795	n/a	9 614	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	n/a	191	n/a	158	56
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	+/- 6.9	n/a	+/- 7.6	13.0

Hongrie



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	4 419 859	4 455 780	4 495 351	4 604 029	4 658 530	4 838 259
GDP PIB € m	179 989	155 491	156 438	164 050	255 815	294 110
GDP/PIB head/habitant €	40 723	34 896	34 800	35 632	54 913	60 788
Construction € m	30 889	14 250	11 662	10 301	24 200	24 519

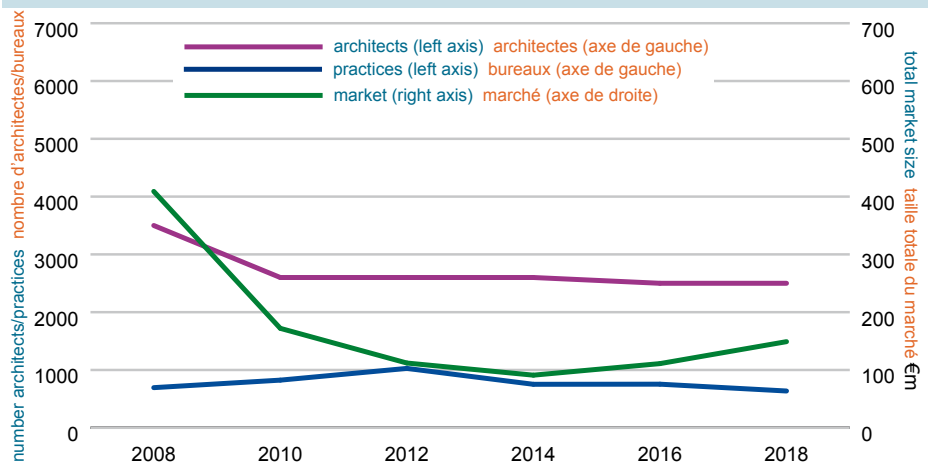
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	3 500	2 600	2 600	2 600	2 500	2 500
% Male Homme	77	70	69	71	68	69
% Female Femme	23	30	31	29	32	31
% <40 years <40 ans	56	42	36	19	26	28
Practices Bureaux	694	824	1 027	752	754	636

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	409	172	112	91	111	149
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	146 294	116 390	101 324	85 367	121 967	206 000
6 - 10 persons personnes	498 453	718 106	501 000	554 417	503 143	463 134

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	16	26	26	26	26	22
Partners & Directors Associé dirigeant	23	28	26	27	22	22
Private practice Salaried Salarié – Secteur privé	40	26	26	25	32	43
Private in-house L'industrie / commerce	1	1	0	0	0	1
Freelance Indépendant	2	3	2	2	3	1
Other Private Autres – Secteur privé	4	2	4	0	2	2
Local / central government Collectivité locale / gouvernement	8	9	9	13	9	7
Other Public Autre – secteur public	4	6	6	3	4	3

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	75 000	40 000	25 000	35 000	40 000	50 000
Partners & Directors Associé dirigeant	80 000	55 000	45 000	45 000	58 000	60 000
Private practice Salaried Salarié – Secteur privé	60 000	45 000	42 000	43 000	44 343	48 000
Private in-house L'industrie / commerce	n/a	23 500	31 000	n/a	n/a	n/a
Freelance Indépendant	72 500	66 500	55 194	22 500	n/a	n/a
Other Private Autres – Secteur privé	70 000	72 000	76 000	n/a	52 000	n/a
Local / central government Collectivité locale / gouvernement	60 000	74 000	71 000	67 550	69 000	70 000
Other Public Autre – secteur public	65 000	50 250	43 000	70 000	56 500	73 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	147	547	361	267	322	162
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 8	+/- 4	+/- 4.8	+/- 5.7	+/- 5.1	7.4



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	59 618 114	60 340 328	60 850 782	60 782 668	60 665 551	60 483 973
GDP PIB € m	1 567 851	1 553 350	1 580 220	1 560 024	1 642 444	1 724 955
GDP/PIB head/habitant €	26 298	25 743	25 969	25 666	27 074	28 519
Construction € m	204 401	185 616	180 233	184 111	202 126	195 035

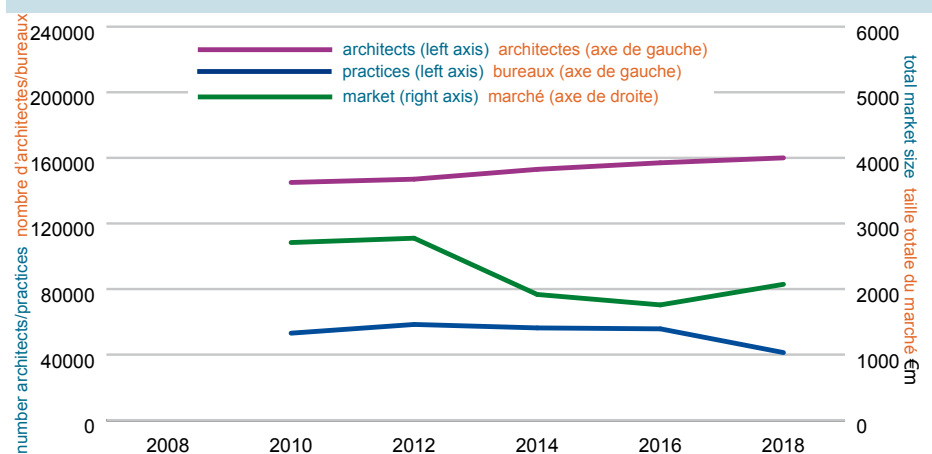
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	n/a	145 000	147 000	153 000	157 000	160 000
% Male Homme	n/a	70	63	62	59	57
% Female Femme	n/a	30	37	38	41	43
% <40 years <40 ans	n/a	58	34	23	28	27
Practices Bureaux	n/a	53 081	58 397	56 284	55 720	41 242

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	2 709	2 775	1 917	1 758	2 072
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	52 108	60 380	50 006	49 171	51 843
6 - 10 persons personnes	n/a	470 573	253 669	208 189	164 400	139 833

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Italy

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	39	46	47	39	34
Partners & Directors Associé dirigeant	n/a	10	6	6	4	5
Private practice Salaried Salarié – Secteur privé	n/a	20	17	15	13	13
Private in-house L'industrie / commerce	n/a	1	2	2	2	2
Freelance Indépendant	n/a	16	13	13	20	21
Other Private Autres – Secteur privé	n/a	9	9	8	10	10
Local / central government Collectivité locale / gouvernement	n/a	3	4	5	5	6
Other Public Autre – secteur public	n/a	2	4	4	6	9

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	20 000	27 000	30 000	27 500	27 500
Partners & Directors Associé dirigeant	n/a	27 900	34 500	36 000	35 000	30 000
Private practice Salaried Salarié – Secteur privé	n/a	15 750	24 000	27 778	24 000	22 000
Private in-house L'industrie / commerce	n/a	15 000	20 000	n/a	25 000	28 000
Freelance Indépendant	n/a	22 000	25 000	20 000	18 000	20 000
Other Private Autres – Secteur privé	n/a	30 000	30 000	26 000	22 000	21 000
Local / central government Collectivité locale / gouvernement	n/a	n/a	28 000	30 000	30 000	30 000
Other Public Autre – secteur public	n/a	20 000	25 000	26 000	27 000	30 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	124	14 004	8 167	12 568	9 018
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-9	+/- 0.8	+/- 1.1	+/- 0.8	1.0



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	2 270 894	2 248 374	2 042 371	2 001 468	1 968 957	1 934 379
GDP PIB € m	23 037	16 693	21 338	23 372	24 349	27 033
GDP/PIB head/habitant €	10 145	7 425	10 447	11 677	12 366	13 975
Construction € m	7 241	3 737	3 705	5 481	3 491	6 518

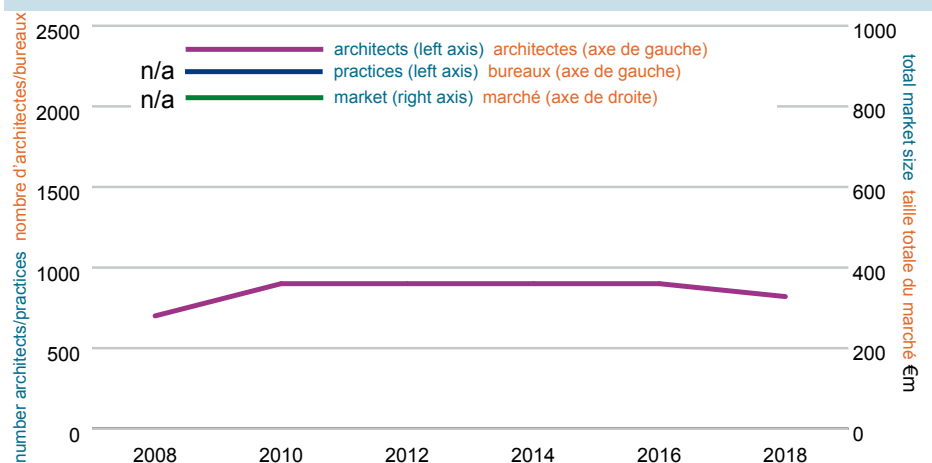
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	700	900	900	900	900	820
% Male Homme	n/a	n/a	n/a	42	n/a	n/a
% Female Femme	n/a	n/a	n/a	58	n/a	n/a
% <40 years <40 ans	n/a	n/a	n/a	29	n/a	n/a
Practices Bureaux	n/a	n/a	n/a	245	n/a	n/a

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	n/a	n/a	23	n/a	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	n/a	n/a	n/a
6 - 10 persons personnes	n/a	n/a	n/a	678 886	n/a	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	15	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	31	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	31	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	0	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	0	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	12	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	12	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	0	n/a	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	19 200	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	4 275	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	3 350	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	6 000	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	1 060	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	5	n/a	36	n/a	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-44	n/a	+/- 16.0	n/a	n/a

Latvia
Lettonie



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	3 366 357	3 329 039	3 199 771	2 943 472	2 888 558	2 808 901
GDP PIB € m	32 288	25 820	30 705	34 631	37 331	42 191
GDP/PIB head/habitant €	9 591	7 756	9 596	11 765	12 924	15 020
Construction € m	5 904	3 203	3 378	3 733	3 479	4 984

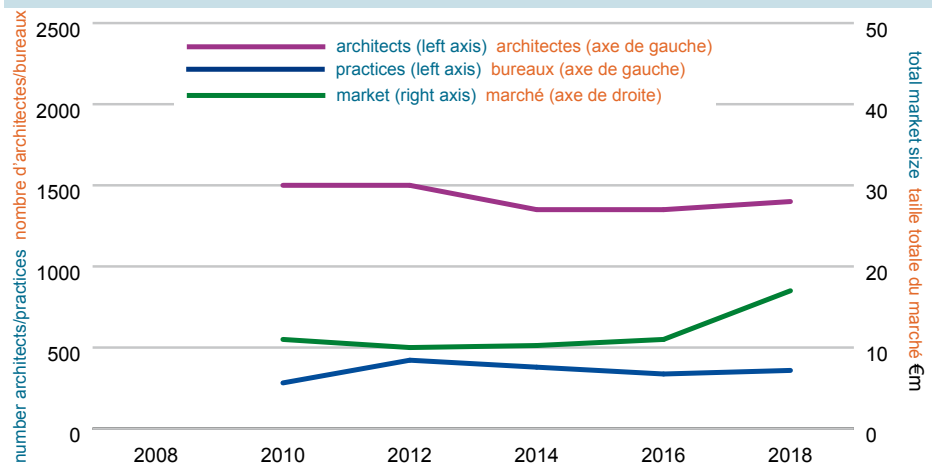
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	n/a	1 500	1 500	1 350	1 350	1 400
% Male Homme	n/a	68	86	n/a	50	52
% Female Femme	n/a	32	14	n/a	50	48
% <40 years <40 ans	n/a	36	37	n/a	38	43
Practices Bureaux	n/a	282	422	n/a	337	359

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	11	10	n/a	11	17
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	29 148	n/a	n/a	26 566	25 106
6 - 10 persons personnes	n/a	82 324	n/a	n/a	178 349	119 063

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	28	24	n/a	14	21
Partners & Directors Associé dirigeant	n/a	28	43	n/a	3	12
Private practice Salaried Salarié – Secteur privé	n/a	20	19	n/a	22	43
Private in-house L'industrie / commerce	n/a	4	0	n/a	0	1
Freelance Indépendant	n/a	8	5	n/a	15	14
Other Private Autres – Secteur privé	n/a	8	5	n/a	36	1
Local / central government Collectivité locale / gouvernement	n/a	4	5	n/a	6	2
Other Public Autre – secteur public	n/a	0	0	n/a	5	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	8 689	n/a	n/a	n/a	15 000
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a	18 000
Private practice Salaried Salarié – Secteur privé	n/a	5 792	n/a	n/a	n/a	12 000
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	10 000
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	6 951	n/a	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	26	22	n/a	143	122
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-19	+/- 20.7	n/a	+/- 7.8	8.5

Lituania



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Luxembourg

Luxembourg

Social & Economic Social & Economique
construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	483 799	502 066	524 853	549 680	576 249	602 005
GDP PIB € m	35 982	40 267	42 822	45 478	51 216	55 299
GDP/PIB head/habitant €	75 400	80 202	81 588	82 736	88 879	91 859
Construction € m	4 585	5 202	5 306	5 579	7 284	7 616

Architectural Profession Profession d'architecte

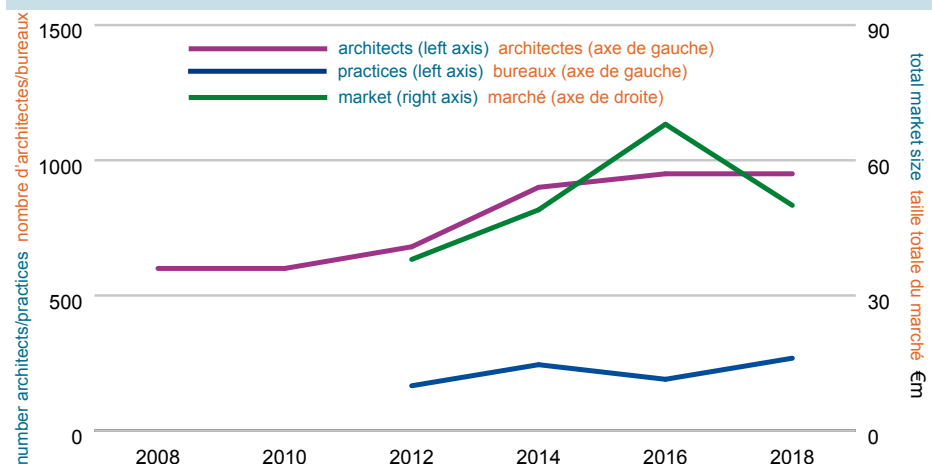
	2008	2010	2012	2014	2016	2018
Architects Architectes *	600	600	680	900	950	950
% Male Homme	69	n/a	72	75	74	68
% Female Femme	31	n/a	28	25	26	32
% <40 years <40 ans	39	0	38	22	14	22
Practices Bureaux	194	n/a	166	244	190	268

* 2008-12 = architects who are obliged to register. 2014 onwards includes voluntary registrations.

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	32	n/a	38	49	68	50
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	154 000	231 165	138 750	n/a
6 - 10 persons personnes	605 778	n/a	683 115	486 532	443 100	n/a

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	31	n/a	39	34	22	39
Partners & Directors Associé dirigeant	14	n/a	24	28	39	25
Private practice Salaried Salarié – Secteur privé	15	n/a	10	19	14	18
Private in-house L'industrie / commerce	1	n/a	0	0	1	0
Freelance Indépendant	16	n/a	9	9	8	14
Other Private Autres – Secteur privé	16	n/a	19	9	15	0
Local / central government Collectivité locale / gouvernement	5	n/a	0	0	0	0
Other Public Autre – secteur public	1	n/a	0	0	0	4

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	57 000	n/a	56 000	56 000	52 050	50 000
Partners & Directors Associé dirigeant	45 000	n/a	75 000	70 000	88 000	82 500
Private practice Salaried Salarié – Secteur privé	90 000	n/a	82 000	48 000	90 750	100 000
Private in-house L'industrie / commerce	n/a	n/a	31 000	n/a	n/a	n/a
Freelance Indépendant	50 000	n/a	50 000	57 000	60 000	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	60 000	80 000	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	50 000	n/a	56 400	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	75	n/a	89	130	86	28
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 11	n/a	+/- 9.7	+/- 8.0	+/- 10.1	18.3



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	410 584	414 372	420 085	425 384	434 403	475 701
GDP PIB € m	5 377	6 235	6 499	7 263	8 788	11 140
GDP/PIB head/habitant €	13 100	15 046	15 471	17 073	20 231	23 417
Construction € m	415	503	501	744	1 043	1 300

Architectural Profession Profession d'architecte

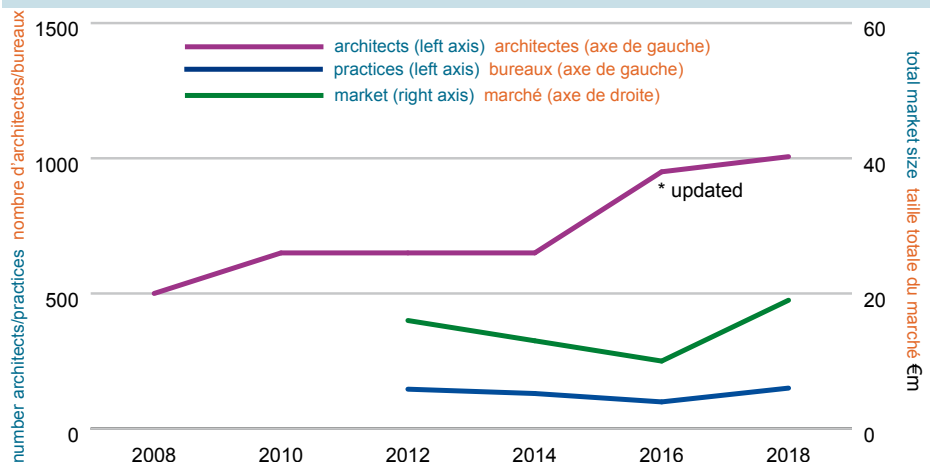
	2008	2010	2012	2014	2016	2018
Architects Architectes	500	650	650	650	650-950*	1 006
% Male Homme	81	n/a	76	73	64	64
% Female Femme	19	n/a	24	27	36	36
% <40 years <40 ans	53	0	56	52	58	67
Practices Bureaux	83	n/a	146	130	99	150

* updated

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	13	n/a	16	13	10	19
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	83 375	n/a	86 125	24 500	n/a	n/a
6 - 10 persons personnes	236 250	n/a	n/a	375 000	n/a	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	9	n/a	18	17	9	21
Partners & Directors Associé dirigeant	15	n/a	16	5	5	8
Private practice Salaried Salarié – Secteur privé	35	n/a	29	35	41	41
Private in-house L'industrie / commerce	1	n/a	0	6	0	2
Freelance Indépendant	12	n/a	3	6	5	3
Other Private Autres – Secteur privé	5	n/a	11	6	7	8
Local / central government Collectivité locale / gouvernement	18	n/a	8	19	18	8
Other Public Autre – secteur public	5	n/a	16	5	16	11

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	51 000	n/a	25 000	25 000	n/a	45 000
Partners & Directors Associé dirigeant	42 000	n/a	45 000	57 500	n/a	n/a
Private practice Salaried Salarié – Secteur privé	20 000	n/a	25 000	21 750	21 300	25 000
Private in-house L'industrie / commerce	25 000	n/a	50 000	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	45 000	40 843	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	25 000	32 500	n/a	47 919
Local / central government Collectivité locale / gouvernement	n/a	n/a	21 300	30 000	28 950	28 000
Other Public Autre – secteur public	25 250	n/a	25 000	40 000	38 500	26 500

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	95	n/a	41	74	45	66
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 9	n/a	+/- 14.8	+/- 10.7	+/- 14.1	11.7

Malte



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	16 404 282	16 577 612	16 730 348	16 829 289	16 979 120	17 118 084
GDP PIB € m	596 226	585 318	606 111	602 658	676 531	737 048
GDP/PIB head/habitant €	36 346	35 308	36 228	35 810	39 845	43 057
Construction € m	85 665	75 162	76 913	70 385	100 870	107 798

Architectural Profession Profession d'architecte

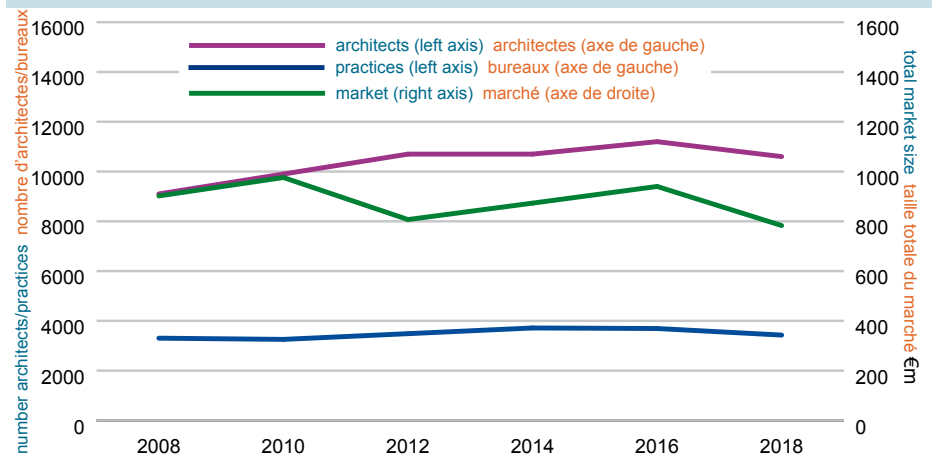
	2008	2010	2012*	2014*	2016	2018
Architects Architectes	9 100	9 900	10 700	10 900	11 200	10 600
% Male Homme	86	81	79	79	80	77
% Female Femme	14	19	21	21	20	23
% <40 years <40 ans	32	32	35	35	39	25
Practices Bureaux	3 304	3 255	n/a	3 714	3 692	3 428

* 2012 / 2014: BNA Annual Benchmark Research

Architectural Market Marché de l'architecture

	2008	2010	2012*	2014*	2016	2018
Market Marché (€ m)	902	976	807	910	940	783
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	103 714	228 532	85 000	105 000	134 649	105 581
6 - 10 persons personnes	325 909	835 500	550 000	560 000	520 133	531 529

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012*	2014*	2016	2018
Sole Principals Dirigeant unique	31	20	20	20	9	28
Partners & Directors Associé dirigeant	45	21	20	18	9	18
Private practice Salaried Salarié – Secteur privé	14	8	10	10	3	18
Private in-house L'industrie / commerce	3	0	2	2	2	2
Freelance Indépendant	3	7	40	45	12	22
Other Private Autres – Secteur privé	0	41	5	2	61	4
Local / central government Collectivité locale / gouvernement	2	0	1	1	2	3
Other Public Autre – secteur public	3	3	2	2	3	5

* 2012 / 2014: BNA Annual Benchmark Research

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012*	2014*	2016	2018
Sole Principals Dirigeant unique	45 144	45 000	41 000	40 000	50 000	60 000
Partners & Directors Associé dirigeant	103 500	71 000	70 000	70 000	56 850	60 000
Private practice Salaried Salarié – Secteur privé	42 000	60 000	41 000	40 000	47 500	45 000
Private in-house L'industrie / commerce	n/a	50 000	50 000	50 000	49 000	n/a
Freelance Indépendant	n/a	64 500	47 000	47 500	29 500	42 500
Other Private Autres – Secteur privé	n/a	n/a	44 000	45 000	40 000	50 000
Local / central government Collectivité locale / gouvernement	n/a	83 000	46 000	45 000	n/a	60 000
Other Public Autre – secteur public	54 000	55 000	55 000	55 000	62 500	55 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

* 2012 / 2014: BNA Annual Benchmark Research

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	118	214	n/a	10	482	464
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-9	+/-7	n/a	+/- 31.0	+/- 4.4	4.4

2012/14: BNA Annual Benchmark Research 2012 151 / 2014 135 Participants Répondants



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Norway

Norvège

Social & Economic Social & Economique
construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	4 799 252	4 858 199	4 985 870	5 107 970	5 213 985	5 295 619
GDP PIB € m	293 273	278 558	358 734	393 966	348 408	354 287
GDP/PIB head/habitant €	61 108	57 338	71 950	77 128	66 822	66 902
Construction € m	43 746	40 974	57 008	56 496	57 609	61 260

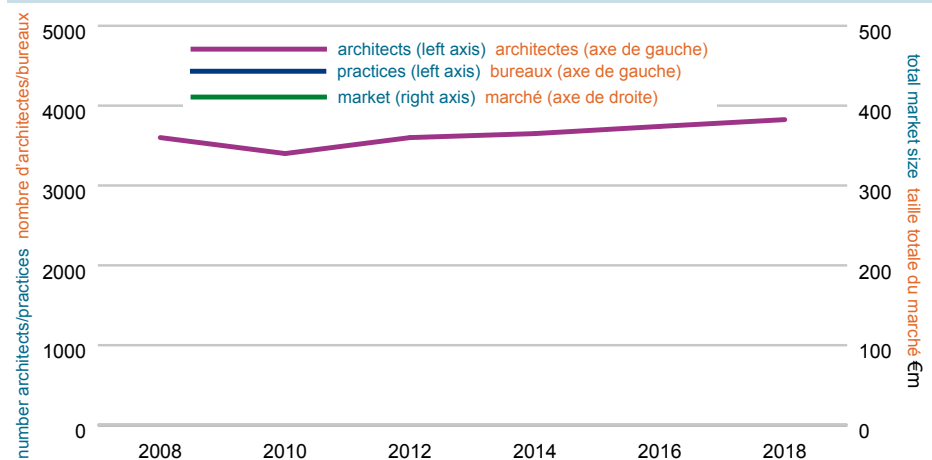
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	3 600	3 400	3 600	3 650	3 740	3 825
% Male Homme	n/a	n/a	n/a	n/a	n/a	47
% Female Femme	n/a	n/a	n/a	n/a	n/a	53
% <40 years <40 ans	n/a	n/a	n/a	n/a	n/a	44
Practices Bureaux	n/a	n/a	n/a	n/a	n/a	630

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	n/a	n/a	n/a	n/a	340
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	n/a	n/a	n/a
6 - 10 persons personnes	n/a	n/a	n/a	n/a	n/a	881 951

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	n/a	9
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a	19
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	n/a	52
Private in-house L'industrie / commerce						0
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	1
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	3
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	10
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	n/a	72 174
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a	76 814
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	n/a	66 710
Private in-house L'industrie / commerce						n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	88 671
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	63 101
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	60 204

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	n/a	n/a	n/a	n/a	254
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	n/a	n/a	5.9



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	38 115 641	38 167 329	38 208 618	n/a	37 967 209	37 976 687
GDP PIB € m	363 154	353 306	370 014	n/a	427 737	467 167
GDP/PIB head/habitant €	9 528	9 257	9 684	n/a	11 266	12 301
Construction € m	68 672	61 695	68 723	n/a	61 170	103 477

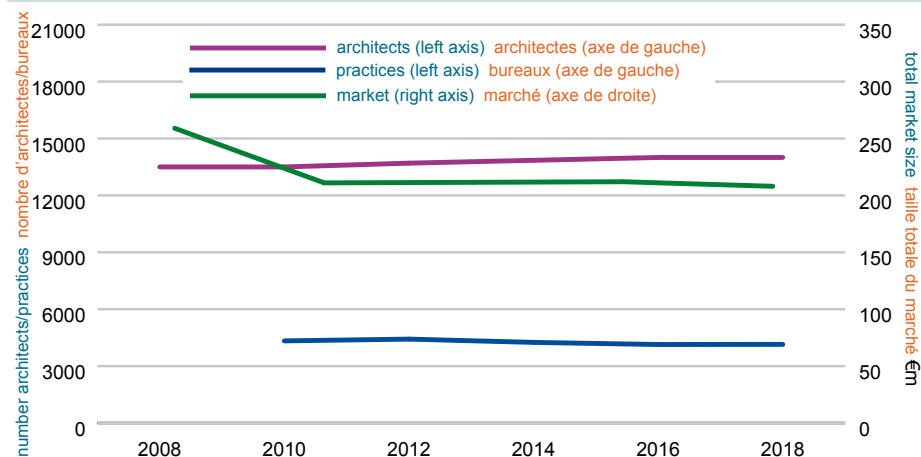
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	13 500	13 500	13 700	n/a	14 000	14 000
% Male Homme	n/a	54	55	n/a	54	59
% Female Femme	n/a	46	45	n/a	46	41
% <40 years <40 ans	n/a	54	51	n/a	66	72
Practices Bureaux	n/a	4 330	4 423	n/a	4 138	4 146

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	259	211	n/a	212	208
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	35 645	24 566	n/a	19 624	n/a
6 - 10 persons personnes	n/a	208 280	132 438	n/a	199 662	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	45	41	n/a	35	34
Partners & Directors Associé dirigeant	n/a	13	14	n/a	11	16
Private practice Salaried Salarié – Secteur privé	n/a	26	27	n/a	29	44
Private in-house L'industrie / commerce	n/a	1	2	n/a	0	0
Freelance Indépendant	n/a	5	5	n/a	12	3
Other Private Autres – Secteur privé	n/a	5	3	n/a	6	0
Local / central government Collectivité locale / gouvernement	n/a	4	5	n/a	7	0
Other Public Autre – secteur public	n/a	1	2	n/a	2	3

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	13 604	14 453	n/a	12 208	n/a
Partners & Directors Associé dirigeant	n/a	22 674	23 487	n/a	40 047	n/a
Private practice Salaried Salarié – Secteur privé	n/a	12 697	11 804	n/a	4 929	8 436
Private in-house L'industrie / commerce				n/a	n/a	n/a
Freelance Indépendant	n/a	14 864	9 154	n/a	4 381	n/a
Other Private Autres – Secteur privé	n/a	21 414	19 223	n/a	799	n/a
Local / central government Collectivité locale / gouvernement	n/a	13 730	8 672	n/a	11 078	n/a
Other Public Autre – secteur public	n/a	8 818	1 349	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	704	560	n/a	201	36
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/- 4	+/- 4.1	n/a	+/- 6.9	16.3

Pologne



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	10 617 575	10 637 713	10 541 840	10 427 301	10 341 330	10 291 027
GDP PIB € m	171 983	172 670	170 907	165 690	179 540	194 614
GDP/PIB head/habitant €	16 198	16 232	16 212	15 890	17 361	18 911
Construction € m	29 541	25 246	22 671	18 710	16 342	17 832

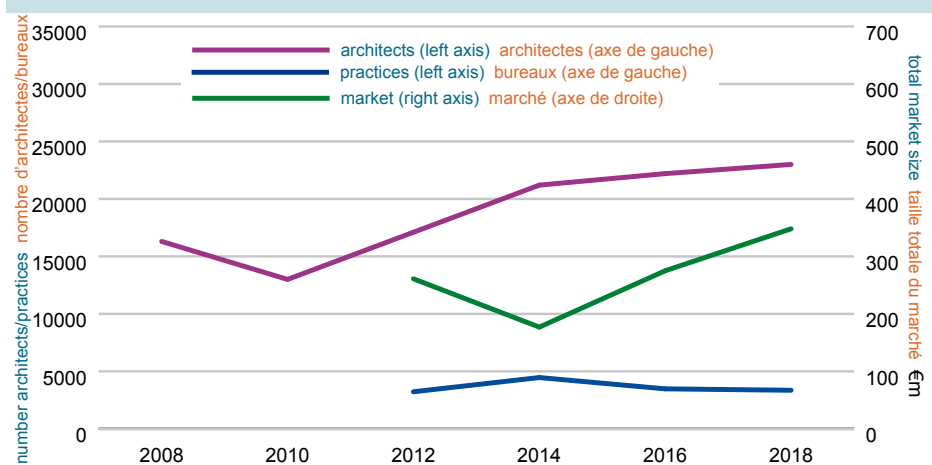
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	16 300	13 000	17 100	21 200	22 200	23 000
% Male Homme	n/a	n/a	56	57	55	54
% Female Femme	n/a	n/a	44	43	45	46
% <40 years <40 ans	n/a	n/a	73	68	53	46
Practices Bureaux	n/a	n/a	3 226	4 462	3 479	3 356

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	n/a	261	177	276	348
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	35 078	38 123	46 334	32 997
6 - 10 persons personnes	n/a	n/a	508 499	223 173	207 800	183 540

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	11	9	11	13
Partners & Directors Associé dirigeant	n/a	n/a	12	10	10	10
Private practice Salaried Salarié – Secteur privé	n/a	n/a	35	37	33	31
Private in-house L'industrie / commerce	n/a	n/a	1	2	1	1
Freelance Indépendant	n/a	n/a	15	13	18	17
Other Private Autres – Secteur privé	n/a	n/a	6	4	3	3
Local / central government Collectivité locale / gouvernement	n/a	n/a	13	21	17	18
Other Public Autre – secteur public	n/a	n/a	7	5	6	6

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	13 000	12 835	14 000	11 520
Partners & Directors Associé dirigeant	n/a	n/a	14 300	14 125	14 400	15 000
Private practice Salaried Salarié – Secteur privé	n/a	n/a	10 600	9 500	9 600	10 200
Private in-house L'industrie / commerce	n/a	n/a	10 850	n/a	n/a	10 000
Freelance Indépendant	n/a	n/a	11 900	10 833	11 000	13 200
Other Private Autres – Secteur privé	n/a	n/a	15 521	11 000	12 250	10 600
Local / central government Collectivité locale / gouvernement	n/a	n/a	18 150	16 820	16 407	16 780
Other Public Autre – secteur public	n/a	n/a	12 000	16 400	20 940	15 000

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	n/a	1 678	1 836	718	1 508
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	+/- 2.2	+/- 2.2	+/- 3.6	2.4

Portugal



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Roumanie

Romania

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	21 528 627	21 462 186	21 355 849	19 942 642	19 759 968	19 523 621
GDP PIB € m	139 765	123 134	136 479	142 245	160 353	187 940
GDP/PIB head/habitant €	6 492	5 737	6 391	7 133	8 115	9 626
Construction € m	31 814	19 877	22 034	31 461	30 014	24 414

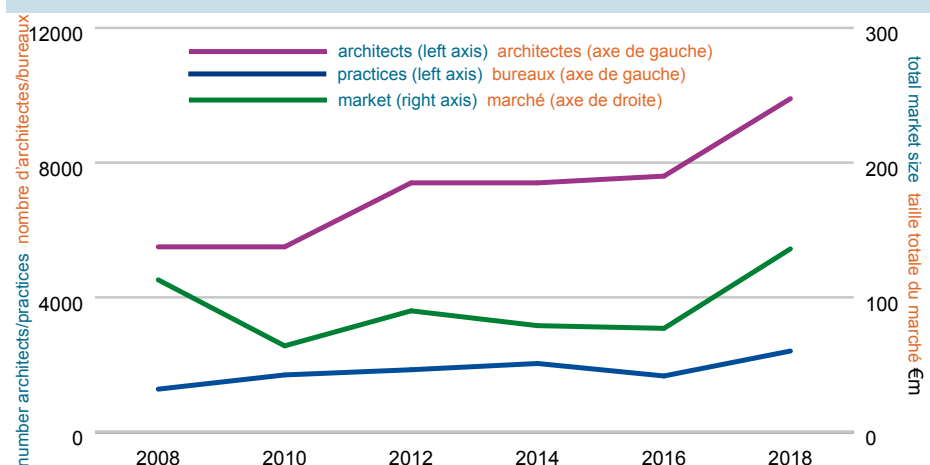
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	5 500	5 500	7 400	7 400	7 600	9 900
% Male Homme	52	53	56	55	77	55
% Female Femme	48	47	44	45	23	45
% <40 years <40 ans	48	48	47	42	33	61
Practices Bureaux	1 275	1 697	1 851	2 037	1 666	2 407

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	113	64	90	79	77	136
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	39 680	29 227	52 789	36 042	n/a	20 816
6 - 10 persons personnes	129 915	68 073	175 358	257 460	81 265	887 162

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	14	28	23	26	33	26
Partners & Directors Associé dirigeant	23	12	20	22	26	19
Private practice Salaried Salarié – Secteur privé	37	37	26	27	13	37
Private in-house L'industrie / commerce	1	2	1	1	0	1
Freelance Indépendant	10	10	3	1	0	10
Other Private Autres – Secteur privé	9	4	21	17	15	3
Local / central government Collectivité locale / gouvernement	3	2	1	2	8	1
Other Public Autre – secteur public	5	5	5	5	5	4

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	16 788	4 699	11 349	7 753	9 155	10 363
Partners & Directors Associé dirigeant	26 889	5 286	7 149	6 890	12 141	5 866
Private practice Salaried Salarié – Secteur privé	11 472	5 286	5 517	2 300	2 900	3 522
Private in-house L'industrie / commerce	14 943	3 552	6 755	n/a	n/a	n/a
Freelance Indépendant	10 912	5 874	4 053	n/a	n/a	6 203
Other Private Autres – Secteur privé	11 192	11 445	3 242	3 615	n/a	14 506
Local / central government Collectivité locale / gouvernement	11 836	3 524	1 430	n/a	n/a	n/a
Other Public Autre – secteur public	13 990	4 699	6 485	7 003	n/a	1 296

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	607	204	365	245	39	522
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 4	+/- 7	+/- 5.0	+/- 6.2	+/- 15.7	4.2



Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	5 400 998	5 424 925	5 404 322	5 415 949	5 426 252	5 443 120
GDP PIB € m	64 572	65 592	71 730	72 134	78 686	84 851
GDP/PIB head/habitant €	11 956	12 091	13 273	13 319	14 501	15 589
Construction € m	14 149	13 335	12 761	12 343	12 418	15 430

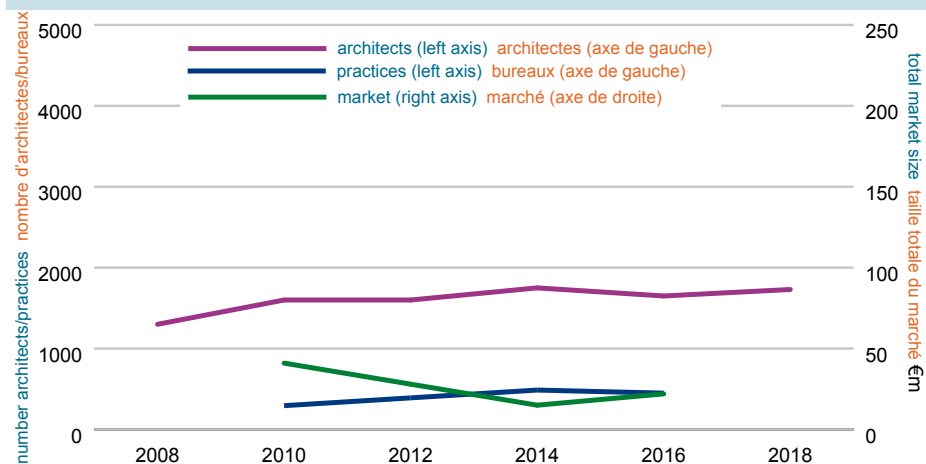
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	1 300	1 600	1 600	1 750	1 650	1 730
% Male Homme	n/a	85	n/a	79	77	n/a
% Female Femme	n/a	15	n/a	21	23	n/a
% <40 years <40 ans	n/a	27	n/a	28	33	n/a
Practices Bureaux	n/a	294	n/a	487	449	n/a

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	41	n/a	15	22	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	23 254	45 100	n/a
6 - 10 persons personnes	n/a	n/a	n/a	41 577	202 667	n/a

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	31	n/a	38	35	n/a
Partners & Directors Associé dirigeant	n/a	13	n/a	10	19	n/a
Private practice Salaried Salarié – Secteur privé	n/a	22	n/a	17	10	n/a
Private in-house L'industrie / commerce	n/a	0	n/a	0	1	n/a
Freelance Indépendant	n/a	22	n/a	26	24	n/a
Other Private Autres – Secteur privé	n/a	3	n/a	4	4	n/a
Local / central government Collectivité locale / gouvernement	n/a	3	n/a	3	5	n/a
Other Public Autre – secteur public	n/a	6	n/a	3	2	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	15 000	n/a	10 000	14 700	n/a
Partners & Directors Associé dirigeant	n/a	38 000	n/a	11 500	10 800	n/a
Private practice Salaried Salarié – Secteur privé	n/a	13 650	n/a	13 000	13 000	n/a
Private in-house L'industrie / commerce	n/a	13 000	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	9 928	8 725	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	21 500	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	12 657	n/a	n/a
Other Public Autre – secteur public	n/a	16 378	n/a	10 000	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	34	n/a	416	143	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-17	n/a	+/- 4.2	+/- 7.8	n/a



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	2 025 866	2 046 976	2 055 496	2 061 085	2 064 188	2 066 880
GDP PIB € m	37 305	35 800	36 172	35 275	38 570	43 000
GDP/PIB head/habitant €	18 414	17 489	17 598	17 115	18 685	20 804
Construction € m	9 428	6 585	4 864	5 522	4 339	7 309

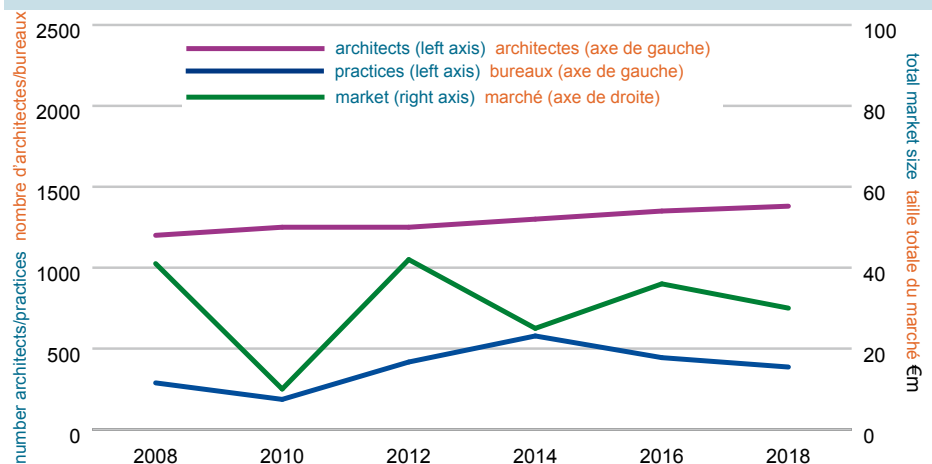
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	1 200	1 250	1 250	1 300	1 350	1 380
% Male Homme	54	50	57	44	48	52
% Female Femme	46	50	43	56	52	48
% <40 years <40 ans	52	43	33	33	24	43
Practices Bureaux	288	186	417	578	444	386

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	41	10	42	25	36	30
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	51 220	n/a	n/a	29 050	62 595	n/a
6 - 10 persons personnes	342 832	n/a	n/a	n/a	115 800	168 750

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	18	21	34	30	20	33
Partners & Directors Associé dirigeant	13	24	19	33	17	13
Private practice Salaried Salarie – Secteur privé	33	36	25	13	19	26
Private in-house L'industrie / commerce	2	0	0	0	4	4
Freelance Indépendant	18	10	13	20	19	20
Other Private Autres – Secteur privé	7	2	3	0	14	0
Local / central government Collectivité locale / gouvernement	5	5	3	3	6	4
Other Public Autre – secteur public	3	2	3	3	3	0

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	33 000	24 000	20 500	24 000	20 000	34 500
Partners & Directors Associé dirigeant	26 000	17 000	33 000	14 400	20 000	n/a
Private practice Salaried Salarie – Secteur privé	16 500	30 000	4 493	13 200	15 000	n/a
Private in-house L'industrie / commerce	12 000	7 550	7 750	n/a	n/a	n/a
Freelance Indépendant	15 600	n/a	22 000	20 000	12 830	21 000
Other Private Autres – Secteur privé	17 000	n/a	13 500	n/a	14 000	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	1 200	n/a	n/a	n/a
Other Public Autre – secteur public	24 500	25 000	15 000	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	96	43	37	53	111	46
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-10	+/-15	+/-15.9	+/-13.2	+/-9.0	14.2

Slovenia



MIRZA & NACEY RESEARCH

Spain

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	45 283 259	45 989 016	46 196 277	46 507 760	46 438 422	46 659 302
GDP PIB € m	1 087 788	1 048 883	1 063 355	1 022 988	1 075 639	1 166 319
GDP/PIB head/habitant €	24 022	22 807	23 018	21 996	23 163	24 996
Construction € m	270 999	191 820	156 525	162 642	131 177	146 327

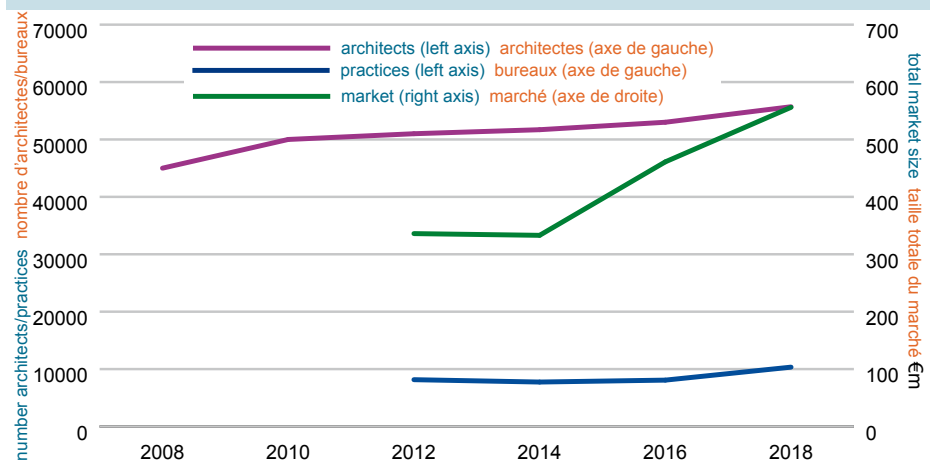
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	45 000	50 000	51 000	51 700	53 800	55 700
% Male Homme	n/a	n/a	75	71	72	65
% Female Femme	n/a	n/a	25	29	28	35
% <40 years <40 ans	n/a	n/a	56	41	50	42
Practices Bureaux	n/a	n/a	8 153	7 742	8 077	10 337

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	n/a	336	333	461	556
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	58 452	42 864	29 855	47 953
6 - 10 persons personnes	n/a	n/a	193 125	153 339	286 250	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Espagne

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	21	17	14	28
Partners & Directors Associé dirigeant	n/a	n/a	11	7	6	10
Private practice Salaried Salarié – Secteur privé	n/a	n/a	5	11	14	20
Private in-house L'industrie / commerce	n/a	n/a	0	0	0	1
Freelance Indépendant	n/a	n/a	14	12	13	22
Other Private Autres – Secteur privé	n/a	n/a	48	40	44	3
Local / central government Collectivité locale / gouvernement	n/a	n/a	1	7	6	7
Other Public Autre – secteur public	n/a	n/a	1	6	3	9

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	30 250	30 000	15 000	29 100
Partners & Directors Associé dirigeant	n/a	n/a	18 000	25 000	25 000	26 000
Private practice Salaried Salarié – Secteur privé	n/a	n/a	16 000	30 000	24 000	18 000
Private in-house L'industrie / commerce	n/a	n/a	15 000	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	26 400	20 000	21 000	20 000
Other Private Autres – Secteur privé	n/a	n/a	20 000	25 000	20 500	23 000
Local / central government Collectivité locale / gouvernement	n/a	n/a	4 200	40 304	52 000	39 000
Other Public Autre – secteur public	n/a	n/a	20 000	36 000	41 000	33 600

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	n/a	184	645	383	194
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	+/- 7.2	+/- 3.8	+/- 5.0	7.0



MIRZA & NACEY RESEARCH

Social & Economic / construction / GDP previous year

	2008	2010	2012	2014	2016	2018
Population	9 182 927	9 340 682	9 482 855	9 644 864	9 851 017	10 120 242
GDP PIB € m	334 227	339 215	387 886	420 849	446 946	475 231
GDP/PIB head/habitant €	36 397	36 316	40 904	43 635	45 371	46 958
Construction € m	38 237	38 269	38 608	43 152	63 559	57 032

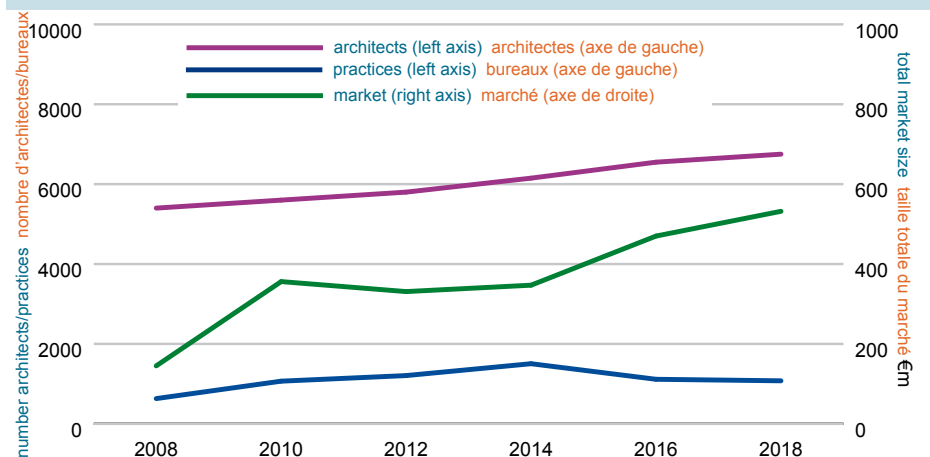
Architectural Profession / Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	5 400	5 600	5 800	6 150	6 550	6 750
% Male Homme	49	51	49	49	54	42
% Female Femme	51	49	51	51	46	58
% <40 years <40 ans	41	31	32	34	25	38
Practices Bureaux	631	1 067	1 207	1 504	1 114	1 076

Architectural Market / Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	145	356	331	347	470	532
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	257 250	170 469	196 857	333 424	204 343	156 525
6 - 10 persons personnes	304 719	640 615	700 687	670 488	908 062	630 058

Trends 2008-18 / Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Field of Employment / Domaine d'activité

	per cent / pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	8	9	12	29	14	8
Partners & Directors Associé dirigeant	10	14	6	17	7	7
Private practice Salaried Salarié – Secteur privé	35	42	39	32	40	58
Private in-house L'industrie / commerce	1	2	1	1	0	0
Freelance Indépendant	6	3	0	1	0	0
Other Private Autres – Secteur privé	6	3	16	4	11	1
Local / central government Collectivité locale / gouvernement	25	20	23	14	24	22
Other Public Autre – secteur public	9	7	3	2	3	4

Earnings / Revenus

	Average earnings €* / Revenu moyen en €*					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	38 376	38 659	51 710	54 903	53 255	30 167
Partners & Directors Associé dirigeant	44 772	53 693	59 620	69 323	76 079	56 564
Private practice Salaried Salarié – Secteur privé	34 347	38 562	44 974	45 254	48 908	40 726
Private in-house L'industrie / commerce	31 980	35 437	73 119	n/a	n/a	n/a
Freelance Indépendant	5 010	37 220	44 884	n/a	n/a	n/a
Other Private Autres – Secteur privé	34 538	38 122	44 783	55 835	46 952	n/a
Local / central government Collectivité locale / gouvernement	43 706	46 412	49 496	61 048	50 321	44 120
Other Public Autre – secteur public	35 178	39 174	45 559	55 458	56 342	40 792

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response / Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	1 188	1 200	1 523	853	661	491
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-5	+/-3	+/- 2.2	+/- 3.1	+/- 3.6	4.3



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	7 701 856	7 785 806	7 954 662	8 136 689	8 325 194	8 482 152
GDP PIB € m	329 214	367 134	474 689	489 673	604 510	601 327
GDP/PIB head/habitant €	42 745	47 154	59 674	60 181	72 612	70 893
Construction € m	37 950	46 326	n/a	47 311	70 218	75 721

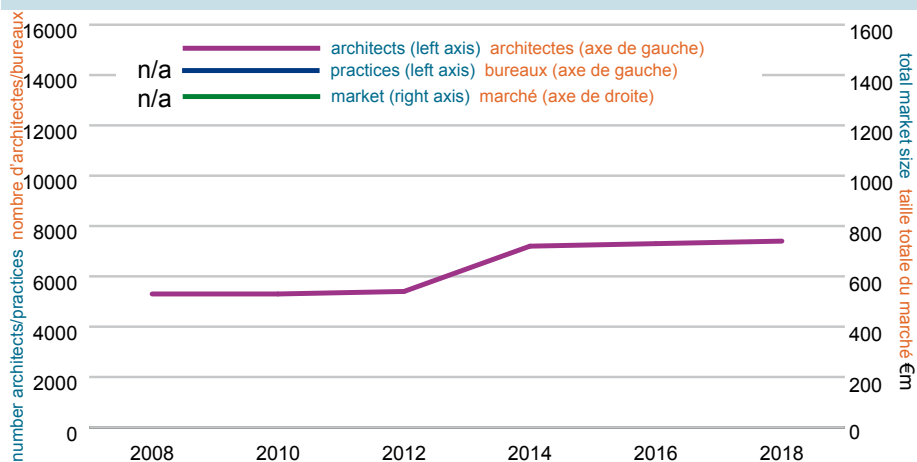
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	5 300	5 300	5 400	7 200	7 300	7 400
% Male Homme	n/a	n/a	n/a	73	n/a	n/a
% Female Femme	n/a	n/a	n/a	28	n/a	n/a
% <40 years <40 ans	n/a	n/a	n/a	33	n/a	n/a
Practices Bureaux	n/a	n/a	n/a	1 629	n/a	n/a

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	n/a	n/a	n/a	624	n/a	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	187 577	n/a	n/a
6 - 10 persons personnes	n/a	n/a	n/a	962 959	n/a	n/a

Trends 2008-18 Tendances 2008-18



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Suisse

Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	22	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	37	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	21	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	1	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	3	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	11	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	5	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	2	n/a	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	n/a	n/a	n/a	90 175	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	98 373	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	69 271	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	59 024	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	90 175	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	111 489	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	n/a

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	n/a	n/a	n/a	200	n/a	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	+/- 6.8	n/a	n/a



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Royaume-Uni

United Kingdom

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016	2018
Population	61 185 981	62 008 048	62 989 550	64 308 261	65 341 183	66 238 007
GDP PIB € m	1 815 417	1 692 703	1 746 962	1 899 098	2 577 280	2 332 087
GDP/PIB head/habitant €	29 670	27 298	27 734	29 531	39 443	35 208
Construction € m	251 309	251 329	243 857	225 064	305 069	367 926

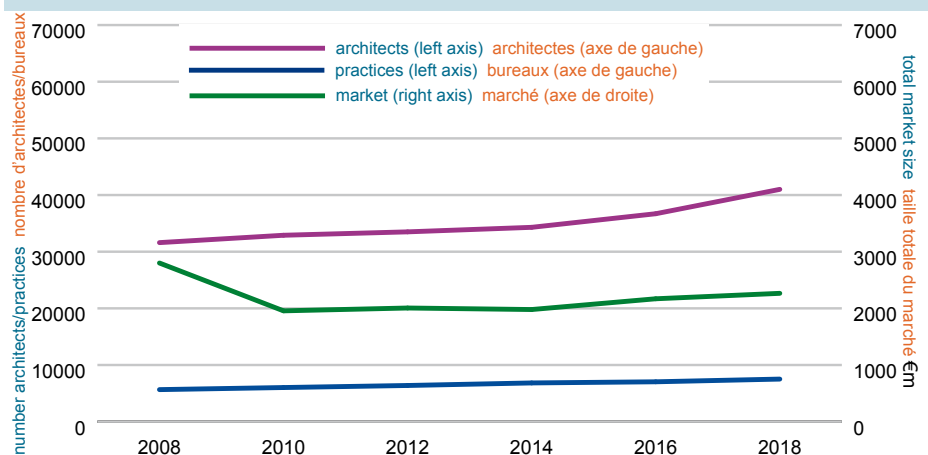
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016	2018
Architects Architectes	31 600	32 900	33 500	34 300	36 700	41 000
% Male Homme	79	70	80	75	67	74
% Female Femme	21	30	20	25	33	26
% <40 years <40 ans	51	35	30	33	37	31
Practices Bureaux	5 655	6 024	6 385	6 835	7 037	7 515

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016	2018
Market Marché (€ m)	2 800	1 956	2 006	1 979	2 169	2 265
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	130 164	n/a	120 700	105 975	110 601	108 955
6 - 10 persons personnes	893 258	542 955	760 354	823 860	657 411	464 416

Trends 2008-18 Tendances 2008-18



Field of Employment Domaine d'activité

	per cent pourcentage					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	8	23	16	14	18	20
Partners & Directors Associé dirigeant	17	16	27	24	17	19
Private practice Salaried Salarié – Secteur privé	56	43	40	51	47	45
Private in-house L'industrie / commerce	4	1	2	1	2	1
Freelance Indépendant	1	2	1	1	3	2
Other Private Autres – Secteur privé	7	3	6	4	5	5
Local / central government Collectivité locale / gouvernement	5	7	5	2	4	3
Other Public Autre – secteur public	3	4	4	5	5	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2018
Sole Principals Dirigeant unique	50 992	12 076	41 338	36 562	35 726	39 704
Partners & Directors Associé dirigeant	58 373	48 306	61 327	60 936	63 796	52 182
Private practice Salaried Salarié – Secteur privé	46 966	42 569	45 382	43 874	50 000	45 376
Private in-house L'industrie / commerce	n/a	43 475	49 062	n/a	53 589	79 691
Freelance Indépendant	67 095	n/a	63 780	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	46 675	51 021	76 780	47 209	70 333
Local / central government Collectivité locale / gouvernement	n/a	56 759	47 966	51 187	50 603	56 720
Other Public Autre – secteur public	49 650	42 569	49 062	54 843	70 000	58 989

* Earnings values are unadjusted for PPP * Revenu moyen NON ajusté par PPA

Response Réponse

	2008	2010	2012	2014	2016	2018
Participants Répondants	127	100	1 828	466	1 074	707
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-9	+/-10	+/- 2.2	+/- 4.5	+/- 2.9	3.7

Appendix

A1 SURVEY METHODOLOGY

The 2018 Sector Study was commissioned by the Architects' Council of Europe (ACE) the representative body for the architectural profession at European level whose Members are the national representative and registration bodies of the profession in all EU Member States, Accession States, Norway and Switzerland. It repeats and updates the previous biennial Sector Studies the first of which was in 2008. All 31 countries from which the ACE drew its membership at the time of the Study in 2018 were invited to participate and 26 countries took part.

The direct cooperation of the Member Organisations of the ACE made it possible to carry out the Study and the results obtained belong to them and to the ACE.

We are extremely grateful to the thousands of architects who participated in this survey. Most respondents completed all sections of the questionnaire. The huge number of respondents to this survey and the quality of the information provided ensures the results have statistical significance and allow us to build up a credible, historical data series about the architectural profession in Europe.

TABLE A-1
ON-LINE SURVEY RESPONSE

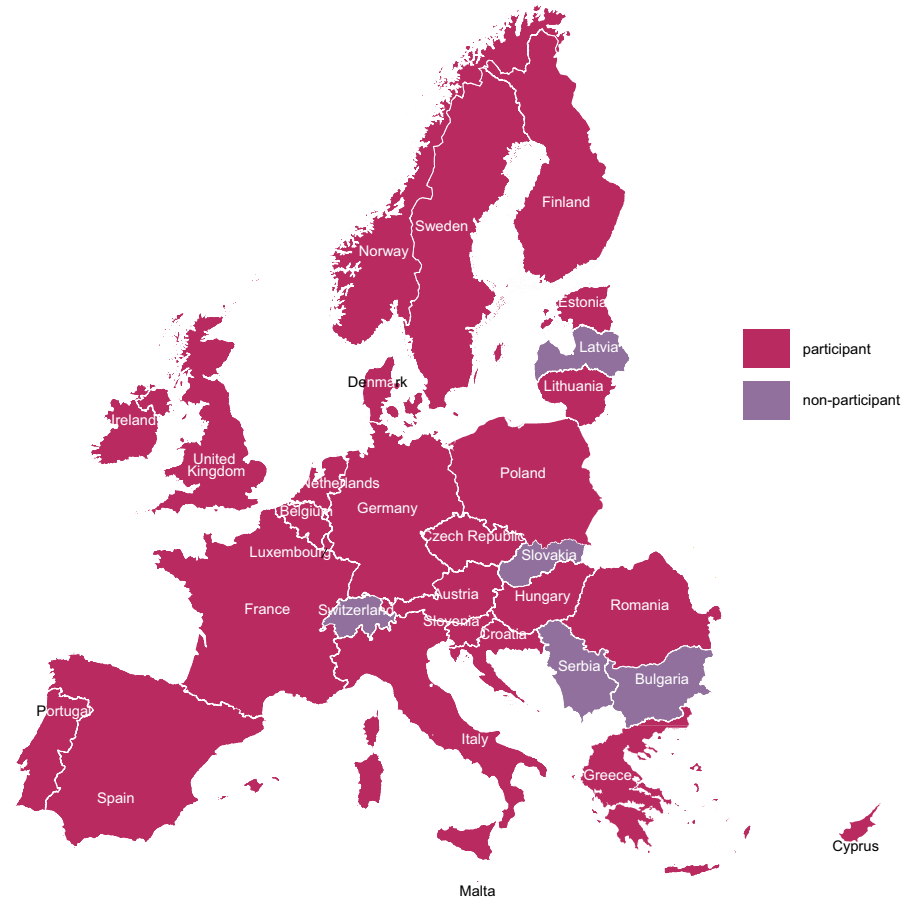
	respondents to Architects' survey	respondents to Principals' survey	total number of replies	total contacted by email	response rate % *
Austria	13	367	380	3 884	9.8
Belgium	58	118	176	7 878	2.2
Croatia	221	84	305	2 650	11.5
Cyprus	13	8	21	400	5.3
Czech Republic	62	91	153	3 818	4.0
Denmark	208	39	247	5 600	4.4
Estonia	6	17	23	249	9.2
Finland	209	62	271	2 241	12.1
France	422	1 129	1 551	25 448	6.1
Germany	8 654	4 466	13 120	86 220	15.2
Greece	200	99	299	5 700	5.2
Hungary	38	18	56	725	7.7
Ireland	94	68	162	2 709	6.0
Italy	5 394	3 624	9 018	137 643	6.6
Lithuania	67	55	122	500	24.4
Luxembourg	3	25	28	581	4.8
Malta	43	23	66	850	7.8
Netherlands	158	306	464	10 000	4.6
Norway	183	71	254	2 827	9.0
Poland	24	12	36	10 000	0.4
Portugal	945	563	1 508	9 700	15.5
Romania	232	290	522	4 833	10.8
Slovenia	18	28	46	1 250	3.7
Spain	72	122	194	n/a	n/a
Sweden	369	122	491	5 640	8.7
United Kingdom	442	265	707	17 500	4.0
2018 EUROPE-26	18 148	12 072	30 220	348 846	8.7

* per cent response amongst those countries where total number contacted by email was known

The Sector Study was aimed at 31 countries:

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Norway
- Poland
- Portugal
- Romania
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- United Kingdom

CHART A-1
COUNTRIES PARTICIPATING IN THE 2018 SURVEY



In this report when data refers to all of these countries it is labelled 'EUROPE - 31'. Totals for countries that participated in the survey are labelled 'EUROPE - 26'.

This year's Sector Study builds upon the experience of the previous Studies. The research methodology remains a statistical survey of architects throughout Europe the aim being to create national and Europe-wide statistics of the profession sourced from original primary research conducted directly amongst architects themselves. This approach is favoured due to the fact that although several countries do have their own statistical data about the profession many more do

not. Further whilst much of the data held by Member Organisations is excellent at a national level when we attempt to look at the profession across Europe there are many gaps and inconsistencies. For that reason the Sector Study seeks the same information directly from architects in all ACE member countries.

As in previous years the best way of obtaining this information is with the co-operation of Member Organisations. We are immensely grateful for the help they have provided.

The research reported here is based on an on-line questionnaire survey which was conducted amongst the architect members of 26 ACE member countries. At least one Member Organisation in each of the 31 ACE member countries was invited to participate. This year the questionnaire was changed very slightly with some additional questions and some removed. The questionnaire was available to respondents in 20 different languages.



The survey methodology was as follows:

1. Member Organisations were asked to identify all their members for whom an email address was available. Member Organisations then allocated identification numbers to each member - the purpose being to identify who responds so they do not need to receive a 'reminder'.
2. Member Organisations constructed and sent out an email which included a link to the on-line questionnaire. Two 'reminder' emails were sent out to architects who did not respond.
3. Architects were guided to the on-line survey form which could be read and completed in any one of twenty different languages. The information they provided was submitted electronically to the research team; no-one at either the Member Organisation or the ACE saw the personal reply.
4. All data was aggregated and analysed by the research team.

In some countries architects were invited by their Member Organisation to participate by way of an email newsletter rather than a direct link. It was therefore not possible to identify and 'remind' non-participants.

Substantial work by the Member Organisations was undertaken in identifying the sample and subsequently organising the contact with their members; we are very grateful indeed for all the help and support these 26 Member Organisations have provided. A number of Member Organisations in other countries spent considerable time in attempting to participate ultimately without success; we thank them too.

Responses to the survey were received electronically. 17 100 architects replied directly to the ACE questionnaire, and a further 13 120 architects responded to the same questions included in the BAK survey.

The response is considered satisfactory for the level of analysis undertaken. The statistical validity of these results is accurate to within ± 0.5 per cent at the 95 per cent confidence level. The accuracy varies for each individual country and these \pm levels should be regarded very carefully when making comparisons between countries. Where the accuracy range is wider than ± 10 we have indicated with an asterisk that the data should be considered with caution.

TABLE A-2 STATISTICAL VALIDITY: ACCURACY OF RESULTS PLUS OR MINUS XX PER CENT AT THE 95% CONFIDENCE LEVEL

	accuracy within range of plus or minus: (%) *
Austria	4.8
Belgium	7.3
Croatia	5.2
Cyprus	21.2
Czech Republic	7.8
Denmark	6.2
Estonia	20.2
Finland	5.7
France	2.4
Germany	0.8
Greece	5.6
Hungary	13.0
Ireland	7.4
Italy	1.0
Lithuania	8.5
Luxembourg	18.3
Malta	11.7
Netherlands	4.4
Norway	5.9
Poland	16.3
Portugal	2.4
Romania	4.2
Slovenia	14.2
Spain	7.0
Sweden	4.3
United Kingdom	3.7
2018 EUROPE-26	0.5

* this means we are 95 per cent confident that the results are accurate to within ± 1 per cent overall or within $\pm xx$ per cent for each individual country





A2 METHODOLOGICAL NOTES

1. Method for weighting the 'All' figure

The 'EUROPE-26' figure in several profiling tables in chapter 1 is weighted to reflect the total architectural population in all countries surveyed.

For each country individually we take the percentage breakdown from the on-line survey (e.g. per cent male and per cent female) and apply those proportions to the total number of architects in each country. This gives us the number of male architects and female architects in each country. These individual country male and female figures are then summed to provide the weighted total number ('All') of male architects and total number of female architects. Finally the total number of males and females is expressed as a percentage of the total number of Architects.

2. Cautionary note: employment status

It is possible there has been an under-reporting of retired architects. Experience in undertaking a regular survey of architects in the UK suggests retired architects are less likely to participate in on-line surveys. Whilst the survey was conducted amongst all members of participating institutes including retired people it is likely that retired people may not have felt the survey was relevant to them and declined to participate.

3. Description of the Model created to estimate the number of architectural practices.

- (i) identify the number of economically active architects in each country – see item 2
- (ii) estimate the number of economically active architects who are in private practice: source - survey results
- (iii) estimate the number of architects working in each private practice size group and country: source - survey results
- (iv) calculate the average number of architects per practice by size group for each country: source - survey results
- (v) estimate the number of practices that each number of architects represents in each size group and country: source - survey results
e.g. if we have 300 architects working in the 3-5 size group for a given country and from survey data we know that, on average,

4 architects work in those practices we can estimate that there are 75 practices in this size group ie 300 architects working in practices comprising 4 architects gives us 75 practices.

(vi) adding the number of practices in each size group gives the total number of practices per country

4. Description of method used to calculate size of architectural market

(i) use the estimates of the number of practices in each size group (see note 4 above)

(ii) multiply the number of practices by the average turnover for practices in that size group - repeat separately for each size group and each country

(iii) each country's market size is calculated by adding together the values for each size group

(iv) very occasionally the data is refined with reference to previous years' data

5. Minimum cell sizes

The minimum number of responses used in each 'cell' (a segment of a statistical table) is generally 10. For the smaller countries a minimum cell size of 5 is applied and in exceptional cases this is extended to 4 where the variance is low.

