

131 ARCHITECTURE - THE PRACTICE



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

3.1 PROFILE OF ARCHITECTURAL PRACTICES

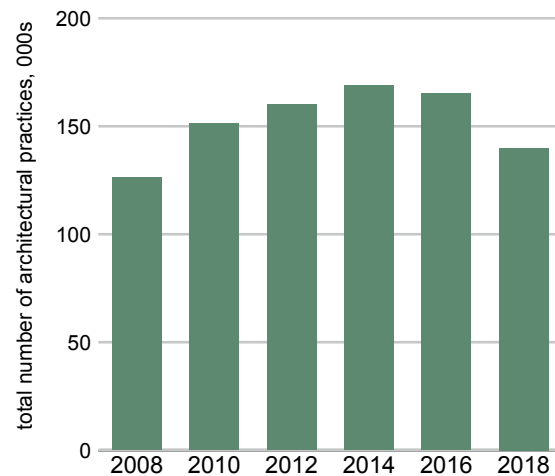
There are fewer architectural practices in Europe than in previous years. The number of private architectural practices in EUROPE-26 is estimated to be 134 000 and grossing this figure up to reflect all 31 European countries produces an estimate of 140 000 private architectural practices in Europe. This 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

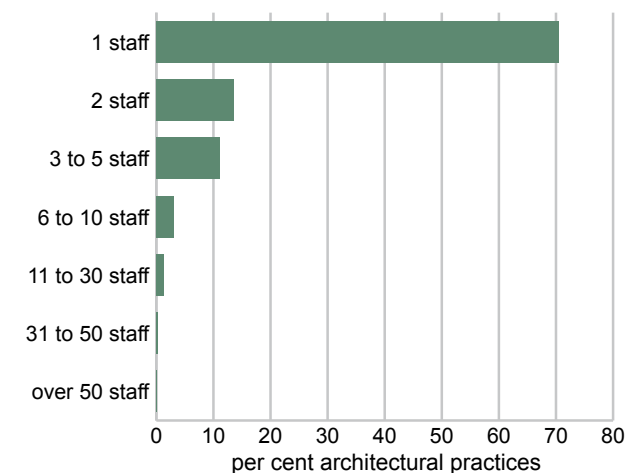
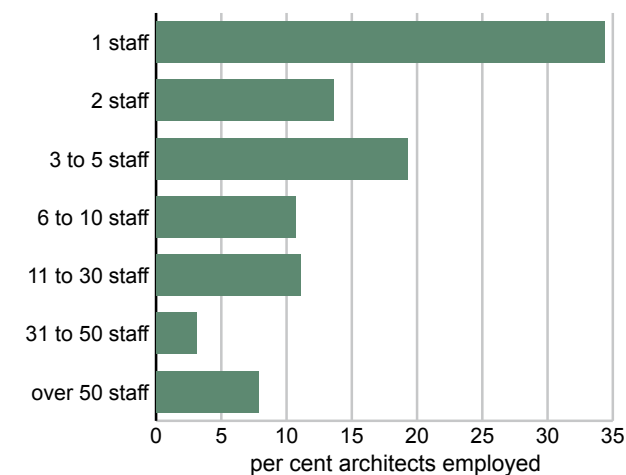


CHART 3-4
PROPORTION OF ARCHITECTS EMPLOYED IN PRACTICES OF DIFFERENT SIZES



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

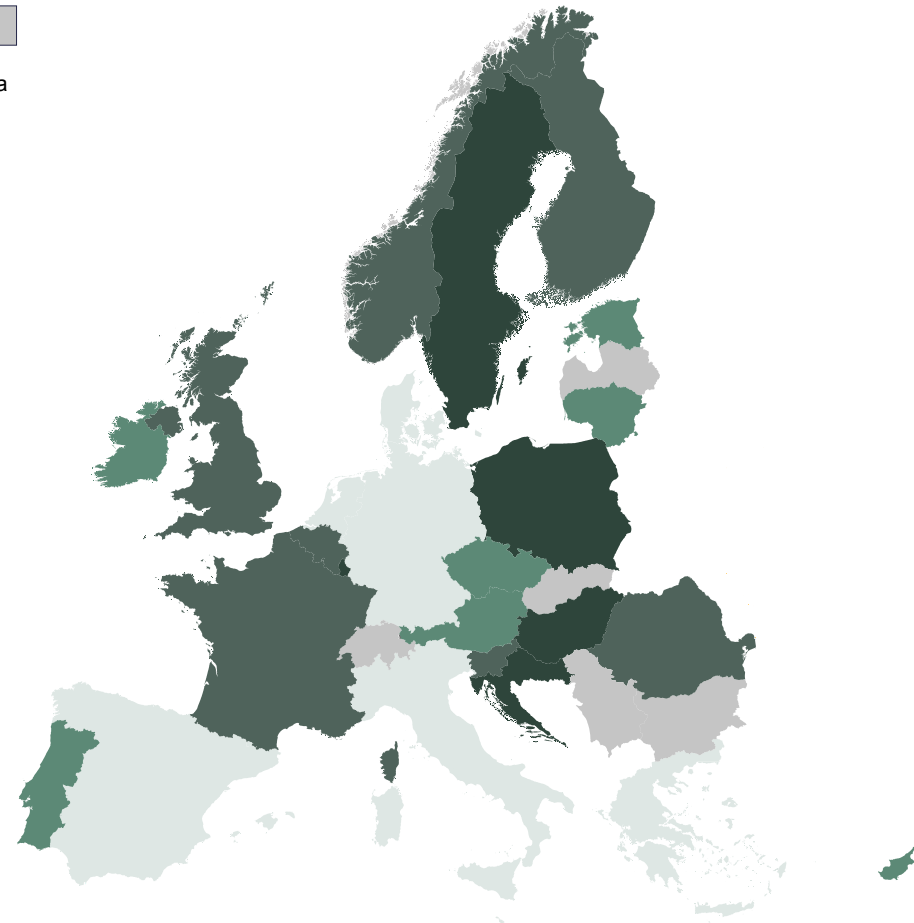
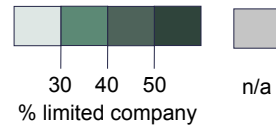
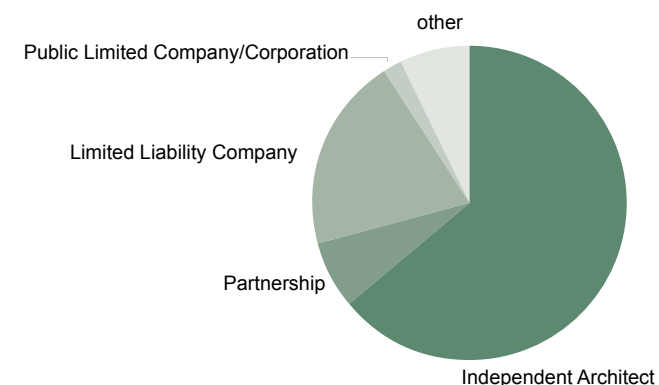


TABLE 3-2
LEGAL FORMATION OF ARCHITECTURAL PRACTICES - BASED ON TYPE OF PRACTICE
IN WHICH PRINCIPALS WORK

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

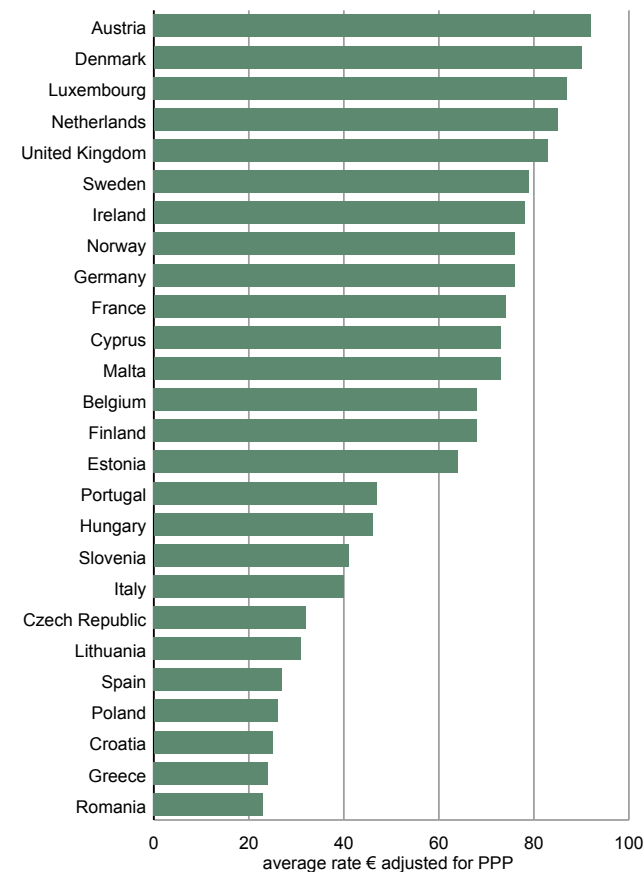


TABLE 3-6
AVERAGE HOURLY CHARGE-OUT RATES UNADJUSTED

€	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

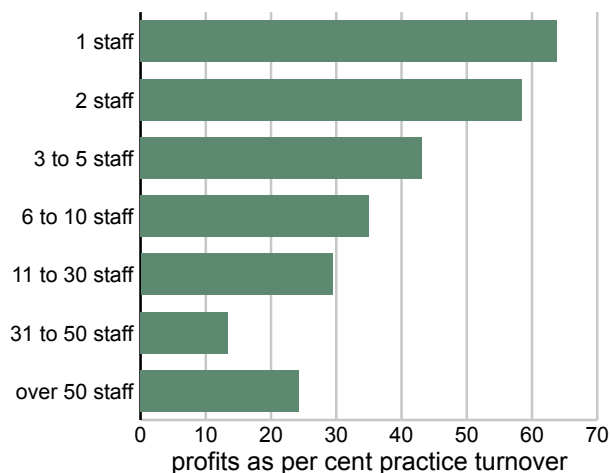


TABLE 3-7
AVERAGE PRE-TAX PROFITS AS A PERCENTAGE OF TOTAL TURNOVER
ANALYSED BY COUNTRY AND PRACTICE SIZE

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

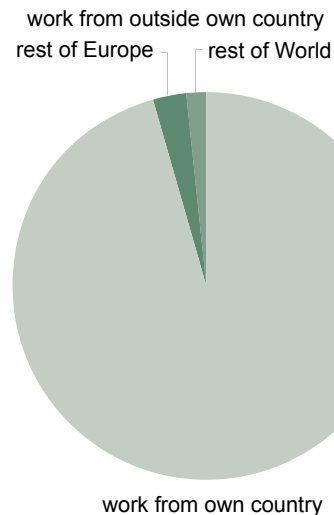


TABLE 3-8
PROPORTION OF PRACTICE TURNOVER DERIVED FROM OUTSIDE THE COUNTRY ANALYSED BY COUNTRY

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

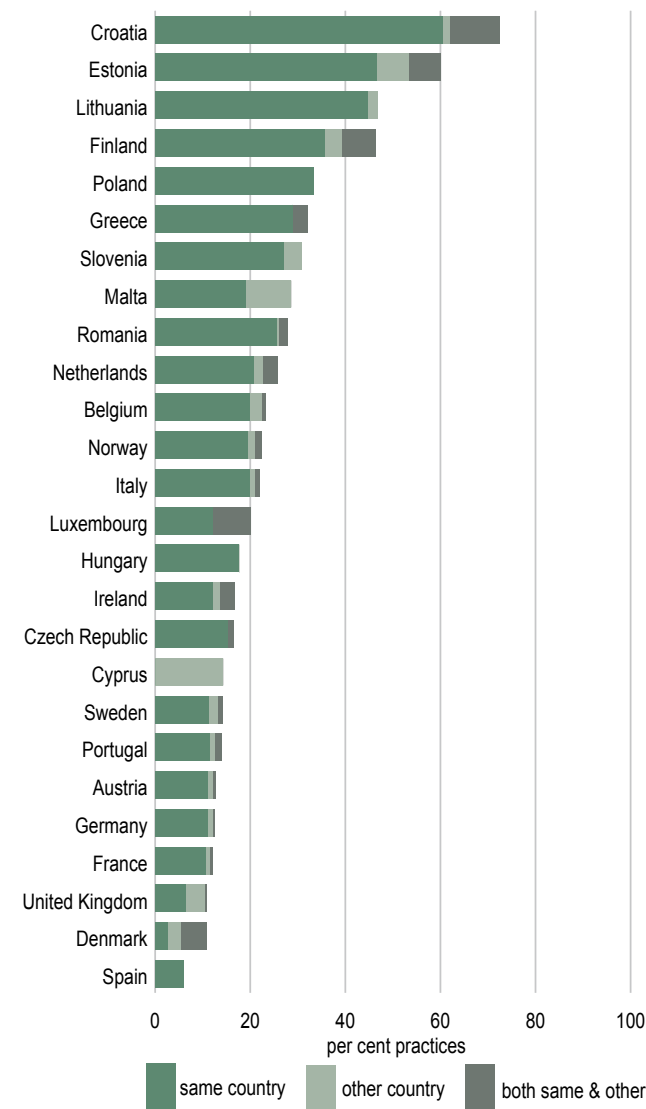
3.8 ASSOCIATIONS

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

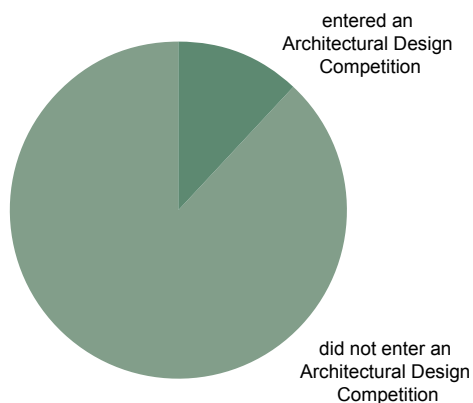


CHART 3-11
DIFFICULTIES EXPERIENCED BY PRACTICES IN THE OJEU BIDDING PROCESS

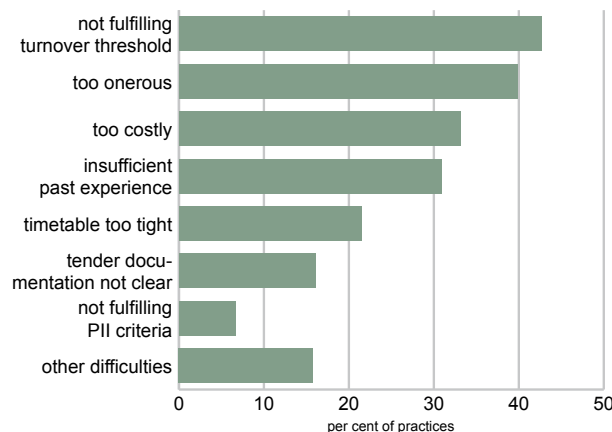


CHART 3-12
ARCHITECTURAL DESIGN COMPETITIONS ENTERED LAST 12 MONTHS - SUCCESS RATES

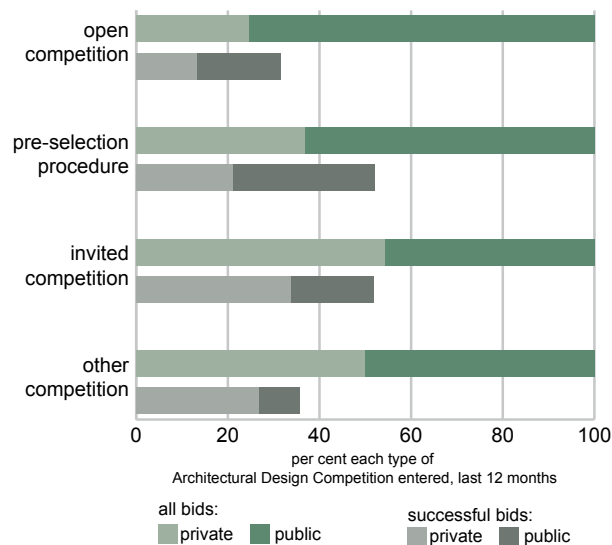


TABLE 3-11
ENTERING ARCHITECTURAL DESIGN COMPETITIONS AND BIDDING FOR PROJECTS ADVERTISED IN OJEU

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

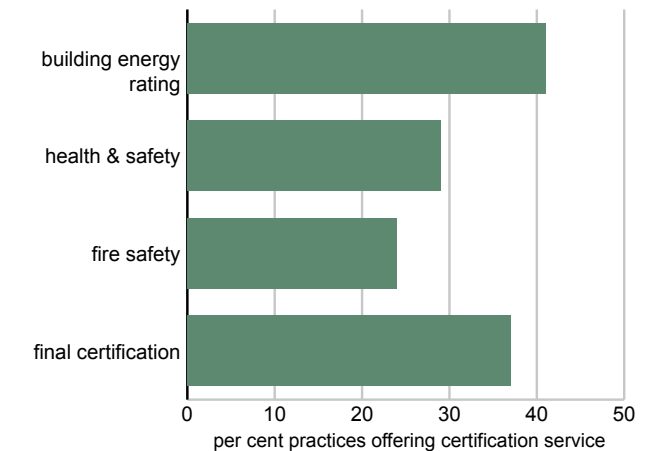
per cent of practices who offer service	type of certification offered				offer a Post Occupancy Evaluation
	building energy rating	health & safety	fire safety	final certification of whole building	
Austria	21	6	8	13	10
Belgium	23	13	11	10	6
Croatia	34	25	14	20	8
Cyprus *	14	9	0	29	0
Czech Republic	28	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

