ARCHITECTS' COUNCIL OF EUROPE

THE ARCHITECTURAL PROFESSION IN EUROPE 2016

A SECTOR STUDY

ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

MIRZA & NACEY RESEARCH

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FINAL

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FOREWORD

This fifth edition of the ACE Sector Study builds on data collected since the first edition of the Study in 2008 and is enriched with new data on Architectural Design Competitions. It is without doubt **the most comprehensive and significant report on the state of the architectural profession in Europe**. This latest version has seen an even greater participation than the previous editions – more than 27.000 respondents in 27 European countries, covering 94% of the profession – and the number of readers of the previous editions attest to the genuine interest of a broad audience in such a study.

Since its first edition, the ACE Sector Study has proved its worth and usefulness. By supporting and effectively guiding our policy positions with statistical evidence, it contributes to enhancing the credibility of ACE in its dealings with policy-makers at EU and national levels. Throughout the legislative process for modernising the Public Procurement and Professional Qualifications Directives, and more recently during the mutual evaluation of regulated professions and in the run-up to the publication of the Services Legislative Package, the Sector Study provided us and the EU institutions with precious data. Moreover, this publication allows ACE Member Organisations, researchers and media to draw insightful comparisons between the European countries and thus enables organisations to put national situations into a wider context. Its information is of vital relevance to professionals seeking to work outside their borders and whenever it is presented, this data draws much interest from the public. The study progressively allows us to track long-term trends and to better understand how the profession has been evolving since the economic crisis. The ACE Sector Study has therefore become **an essential reference tool** for all those interested in better understanding the architectural profession and market.

The 2016 Study reveals **numerous signs of recovery of the architectural market and positive perspectives for the Profession**: the value of the architectural market has increased, the average revenue is higher for most sizes of practices, the number of independent architects has fallen, workloads for the next year are expected to increase. The positive average trends at European level must however not hide the fact that the situation is not the same throughout Europe. Growth is weaker in the south and not surprisingly, the predictions there are more pessimistic. One particular hiccup born out of political events is the concern that was manifested in the UK, so shortly after the Brexit vote.

These results emphasise the **need to take strong and targeted actions at all governance levels** in order to accelerate and consolidate the recovery of the sector, while ensuring safety and quality in the built environment. ACE contributes to raise policy-makers awareness at EU level about the challenges that the profession faces. In 2016, it released a suite of 8 policy statements that clearly set out the European architects' position on a number of key issues affecting our profession. It underlines notably the importance of investing in education to deliver high quality graduates, of facilitating the provision of architectural services across Europe; of implementing public procurement rules based on quality selection criteria and of supporting the regeneration of our cities. Low energy design is still very low on the radar of most practices, as the majority of clients do not deem it important and this is an issue that ACE is very much aware of, active as it is in Global Alliance and movements that are working to mitigate climate change.

I would like to thank all ACE Member Organisations sincerely for their support, as well as all Architects who have responded to our survey and made this new edition of the Sector Study possible.

Luciano Lazzari
ACE President

INTRODUCTION AND SUMMARY

More than 27 000 architects, from 27 different countries, participated in the 2016 ACE Sector Study. The number of countries participating is the highest ever, and the number of individual participants is only just short of the highest ever. Such a high participation level reflects massive interest in this survey and its findings. We are extremely grateful to the 27 000 individual architects who took the time to complete the survey questionnaire and provide the raw data upon which this report is based.

This year's survey shows that architecture in Europe is a growing profession: an increasing number of people are becoming architects. The 2016 estimate is that there are 600 000 architects in Europe. This is 4 per cent higher than in 2014, and the number has been rising in every survey. Large numbers of young people are joining the profession in some Mediterranean countries, while growth this year has been particularly strong on the eastern and western edges of Europe - Turkey and the United Kingdom.

After the economic crisis which began in 2008, we can see an improving picture. Construction output is starting to edge up across Europe, the total value of the architectural market has increased, and architects' performance measures show some growth since 2012. There is clearly some way to go until the profession's health returns to its pre 2008 levels, and in several countries earnings and revenues remain subdued. But for Europe's architects as a whole, the various indicators are moving in a positive direction.

There are signs that the profession may be returning to something nearer normality, after the economic crisis. Average practice revenue is higher for most sizes, indeed for practices with between 2 and 30 staff, average revenue is the highest recorded in any of the ACE sector study surveys. Total revenue of the profession across Europe is estimated to be 12 per cent higher than in 2014. Standing now at 17 billion, this is the highest value since 2008.

There has been a big fall in the number of Independent Architects, in favour of partnerships and limited companies. The number of Independent Architects has fallen from 65 per cent in the 2012 and 2014 surveys to nearer 50 per cent - as in 2008 and 2010. Similarly, the number of Sole Principals is the lowest since 2010. These trends suggest architects are returning to more formal employment within practices, rather than practising alone.

This is confirmed in total practice numbers, which are down - more architects now work in larger practices, and fewer on their own or with one other. This is another sign of recovery from the recession. The reduction in the number of Sole Principals has lifted their average earnings; Sole Principals' earnings are now 23 per cent higher. Average earnings overall are 10 per cent higher; the first time average earnings have increased since the survey began in 2008.

There is evidence that architects are returning to their core service, building design, which now accounts for its highest share of revenue since 2010. Average hourly rates this year are the highest recorded in any of the years this survey has been running. Average rates for Principals are higher by 9 per cent, while for Architects average rates are up by 8 per cent.

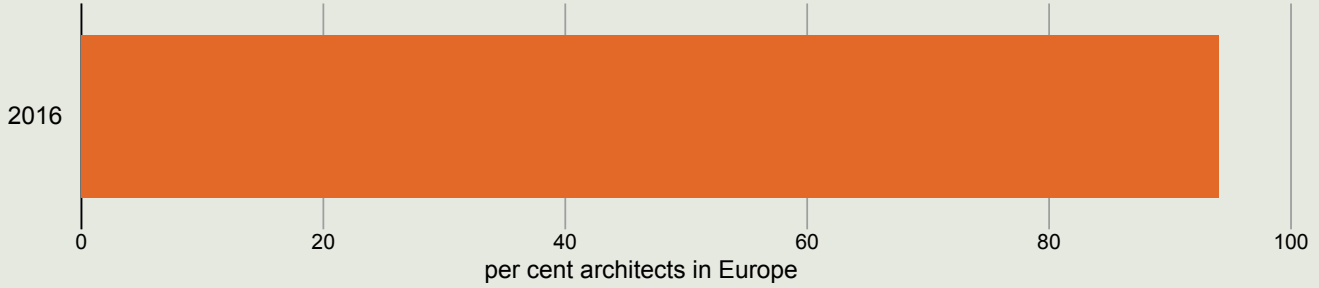
Crucially, architects themselves see a positive future. While some of the financial indicators may have a little way to travel until they match pre 2008 levels, architects feel confident about their immediate future prospects.

For the first time since this survey began in 2008, architects in a majority of countries say they expect more work, on balance, in the coming year. Only two countries record negative 'balance' figures this year; Italy and the UK. There is also evidence that architects are investing in their own future; spending on CPD is substantially higher than in 2014, as is the number of hours spent undertaking CPD.

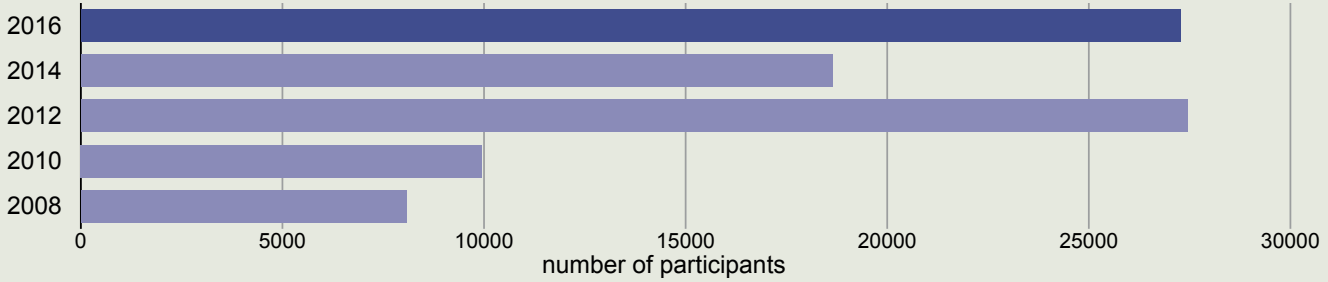
SURVEY PARTICIPATION - 2016

27
member organisations

survey covers
94% of profession

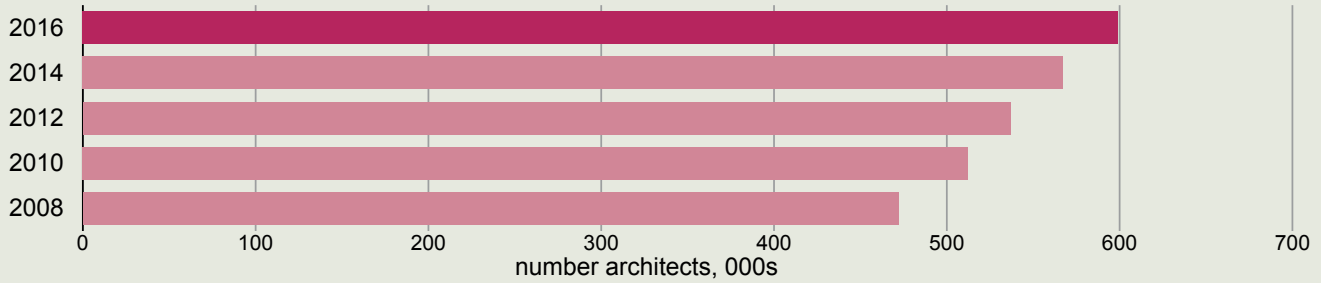


27000
participants

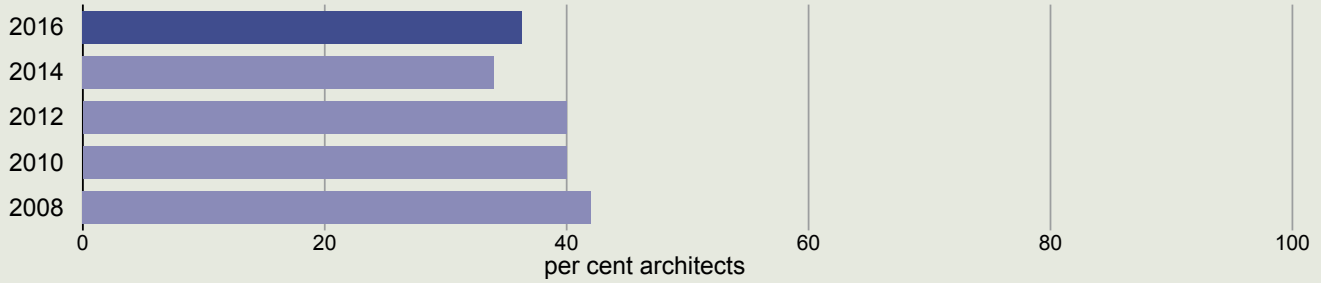


DEMOGRAPHY OF THE PROFESSION

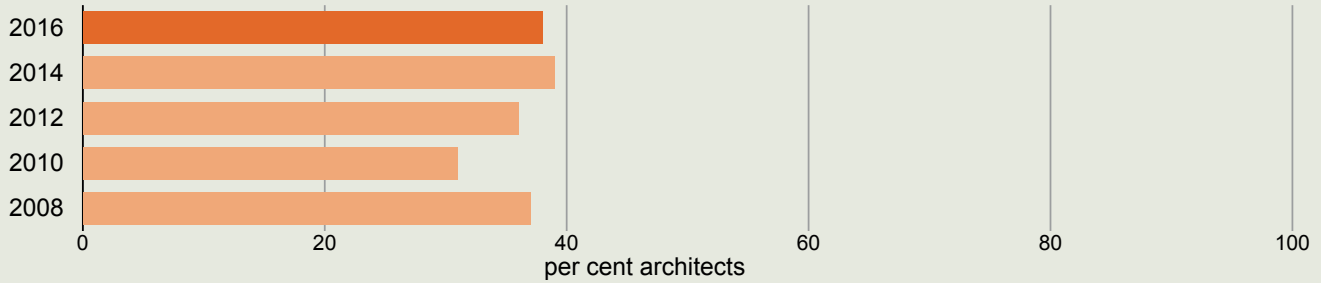
600000
architects in Europe



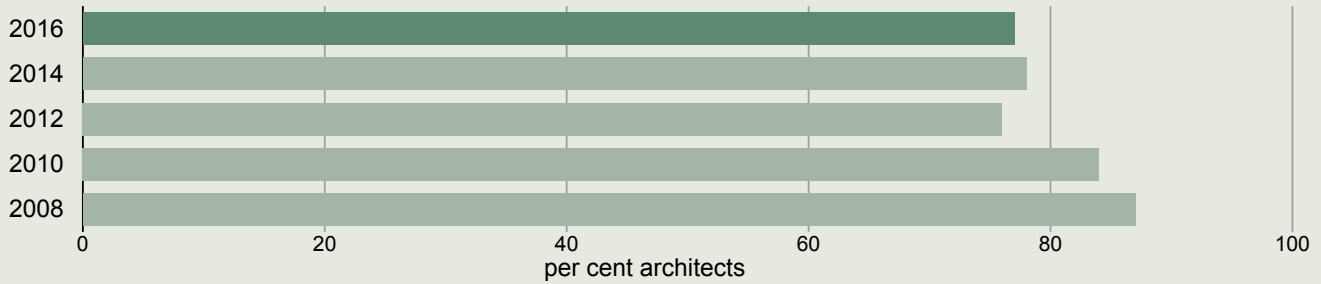
36%
aged under 40



38%
women

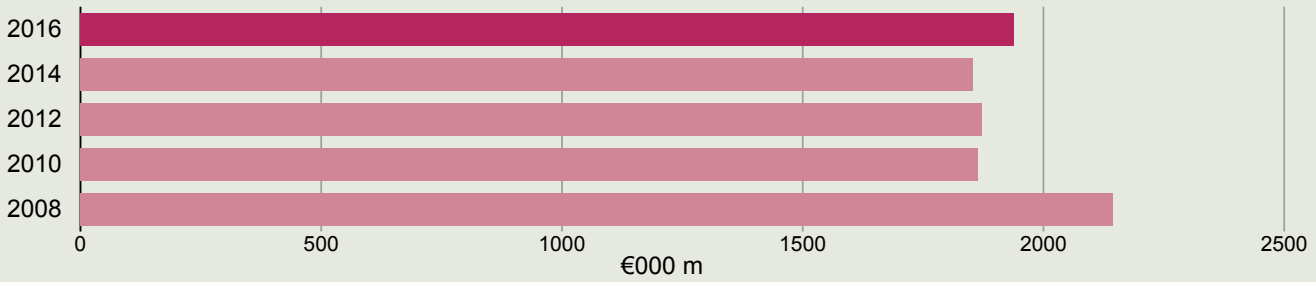


77%
working full-time

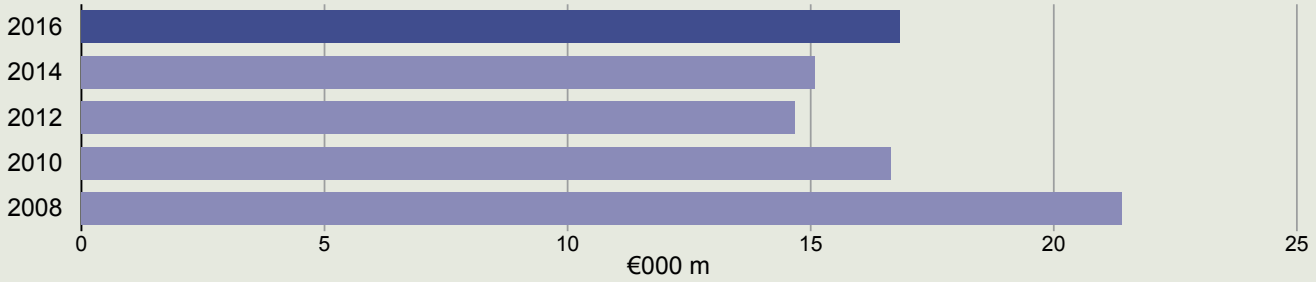


THE MARKET

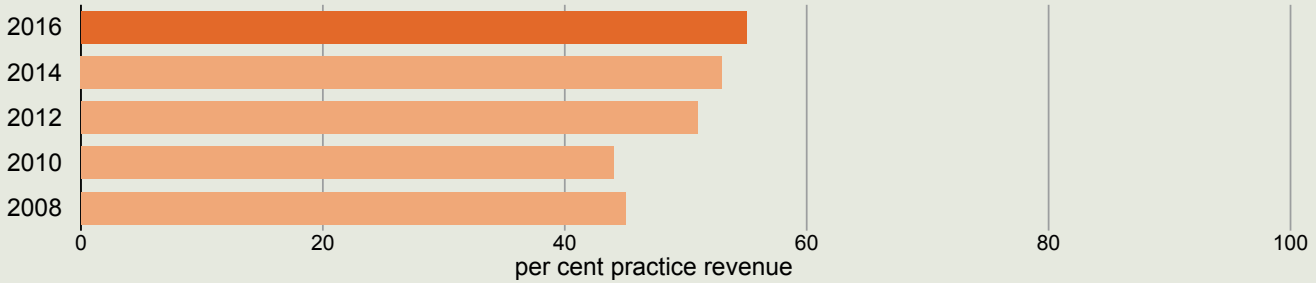
€1939bn
construction output



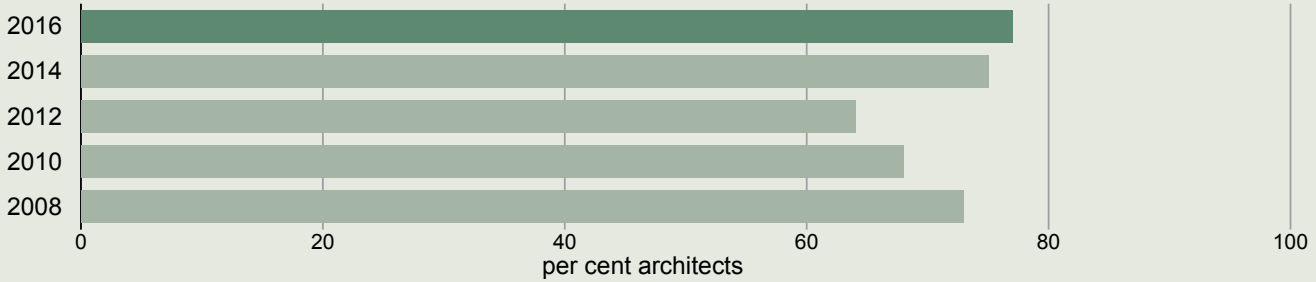
€17 bn
architectural market



55%
architects' work is private housing

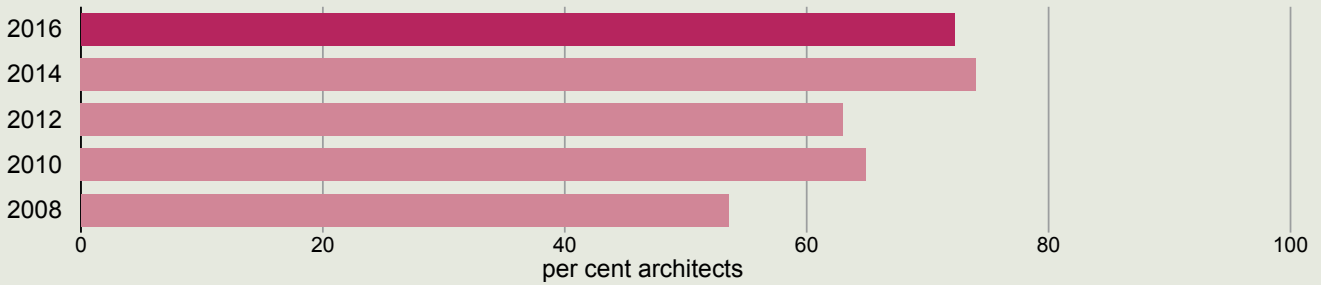


77%
expect rise or no change in workloads next year

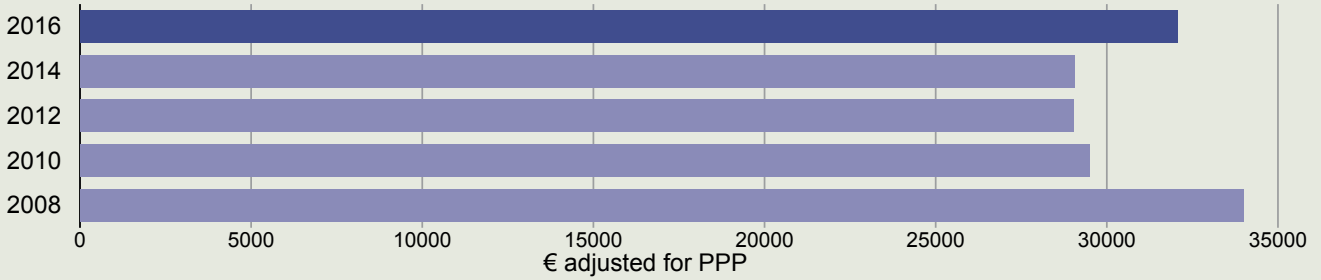


PRACTICE, INCOME, WORK

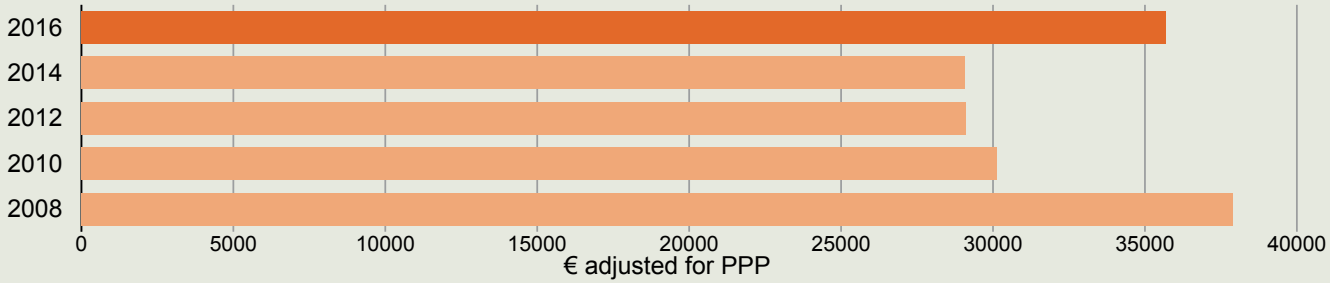
72%
of practices are one person practices



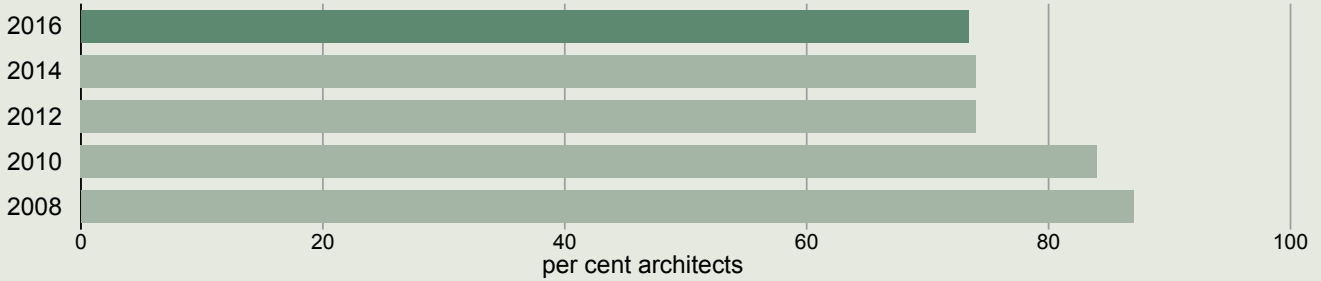
32068
average earnings (PPP)



35679
average earnings (PPP) - Sole Principals



73%
will work as an architect until retired



Architect: NOMA arkitekter AS
Photo: Jean S Lorentzen
Place: Norway, Vestfold Conty, island of Tjøme

1.1 THE NUMBER OF ARCHITECTS IN EUROPE

The estimated total number of architects in EUROPE-32 is approximately 600 000. A quarter of Europe's architects can be found in just one country; Italy, which has 157 000 architects. Germany accounts for another sizable proportion of Europe's architects (109 000).

Other countries with high numbers of architects are Spain (54 000), Turkey (50 000), the United Kingdom (37 000) and France (30 000). Analysed as a proportion of the population, the highest 'densities' of architects - measured as the number of architects per 1 000 population - are in Italy (2.6 architects per 1 000 population), and Portugal (2.1 architects per 1 000 population). The overall density of architects across Europe is 1.0 architects per 1 000 population.

This year's survey figure of 600 000 architects in Europe is 4 per cent higher than in the previous survey two years ago; which itself was 5 per cent higher than two years earlier. 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. The highest growth rates over the last two years (where data for both years is based on an identical source) is Turkey, where the number of architects is up by 12 per cent. The number in the UK has grown by 7 per cent over the two years 2014 to 2016.

CHART 1-1
ESTIMATED NUMBER OF ARCHITECTS 2016

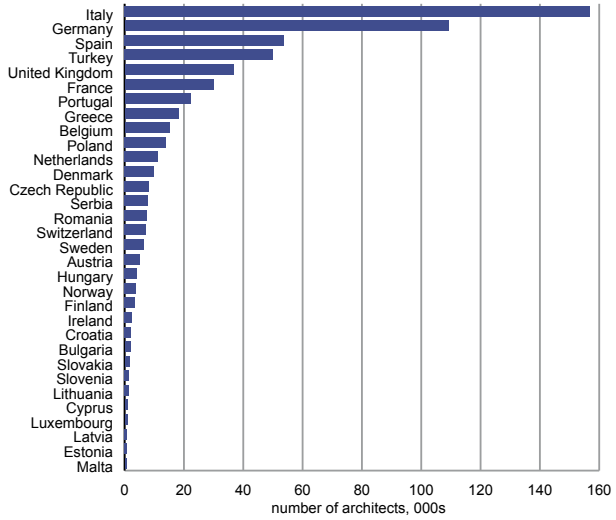
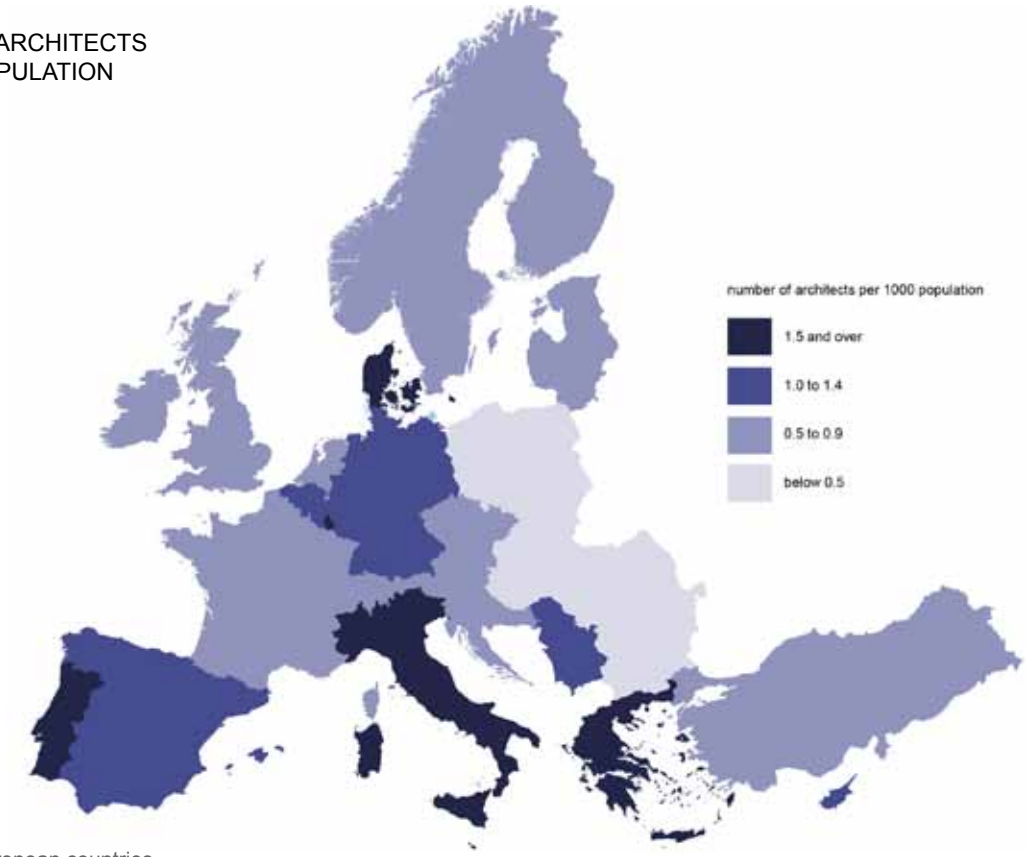


CHART 1-2
NUMBER OF ARCHITECTS
PER 1000 POPULATION



Base: all 32 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	5 200	8 700 471	0.6
Belgium	15 100	11 289 853	1.3
Bulgaria	2 000	7 153 784	0.3
Croatia	2 200	4 190 669	0.5
Cyprus	950	848 319	1.1
Czech Republic	8 300	10 553 843	0.8
Denmark	10 000	5 707 251	1.8
Estonia	800	1 315 944	0.6
Finland	3 500	5 487 308	0.6
France	30 000	66 661 621	0.5
Germany	109 200	82 162 000	1.3
Greece	18 200	10 793 526	1.7
Hungary	4 200	9 830 485	0.4
Ireland	2 500	4 658 530	0.5
Italy	157 000	60 665 551	2.6
Latvia	900	1 968 957	0.5
Lithuania	1 350	2 888 558	0.5
Luxembourg	950	576 249	1.6
Malta	650	434 403	1.5
Netherlands	11 200	16 979 120	0.7
Norway	3 740	5 213 985	0.7
Poland	14 000	37 967 209	0.4
Portugal	22 200	10 341 330	2.1
Romania	7 600	19 759 968	0.4
Serbia	8 000	7 076 372	1.1
Slovakia	1 650	5 426 252	0.3
Slovenia	1 350	2 064 188	0.7
Spain	53 800	46 438 422	1.2
Sweden	6 550	9 851 017	0.7
Switzerland	7 300	8 325 194	0.9
Turkey	50 000	78 741 053	0.6
United Kingdom	36 700	65 341 183	0.6
EUROPE - 32 - 2016	597 100	609 412 615	1.0
EUROPE - 32 - 2014	*578 800*	*565 981 316*	*1.0*
EUROPE - 32 - 2012	*550 530*	*601 451 878*	*0.9*
EUROPE - 32 - 2010	*525 700*	*595 082 893*	*0.9*
EUROPE - 32 - 2008	*485 480*	*586 877 058*	*0.8*

Base: all 32 European countries

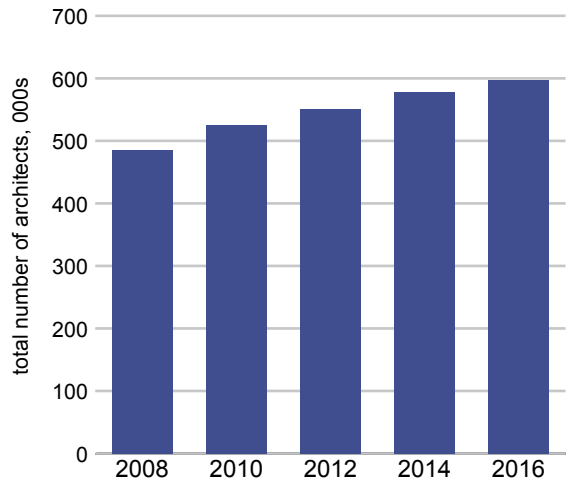
Population source: Eurostat, population as at 1 January 2016, copyright (c) Eurostat

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 research.

To update the figures in 2010, 2012, 2014 and 2016, we used 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-32, 2008-16



Base: all 32 European countries

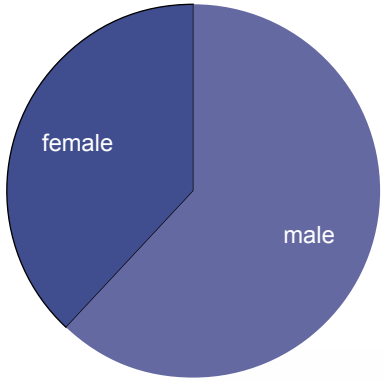
1.2 PROFILE OF ARCHITECTS

TABLE 1-2
GENDER OF ARCHITECTS ANALYSED BY COUNTRY

per cent	gender of architects	
	male	female
Austria	80	20
Belgium	72	28
Bulgaria	46	54
Croatia	41	59
Cyprus *	54	46
Czech Republic *	64	36
Denmark	54	46
Estonia *	73	27
Finland	47	53
France	64	36
Germany ***	66	34
Hungary	72	28
Ireland	68	32
Italy	59	41
Lithuania	50	50
Luxembourg	74	26
Malta *	64	36
Netherlands	80	20
Poland	54	46
Portugal	55	45
Romania *	77	23
Slovakia	77	23
Slovenia	48	52
Spain	72	28
Sweden	54	46
Turkey	54	46
United Kingdom	67	33
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, sourced from BAK surveys 2015 and 2016
** weighted to reflect the total architectural population in all participating countries; weighting process described in Appendix

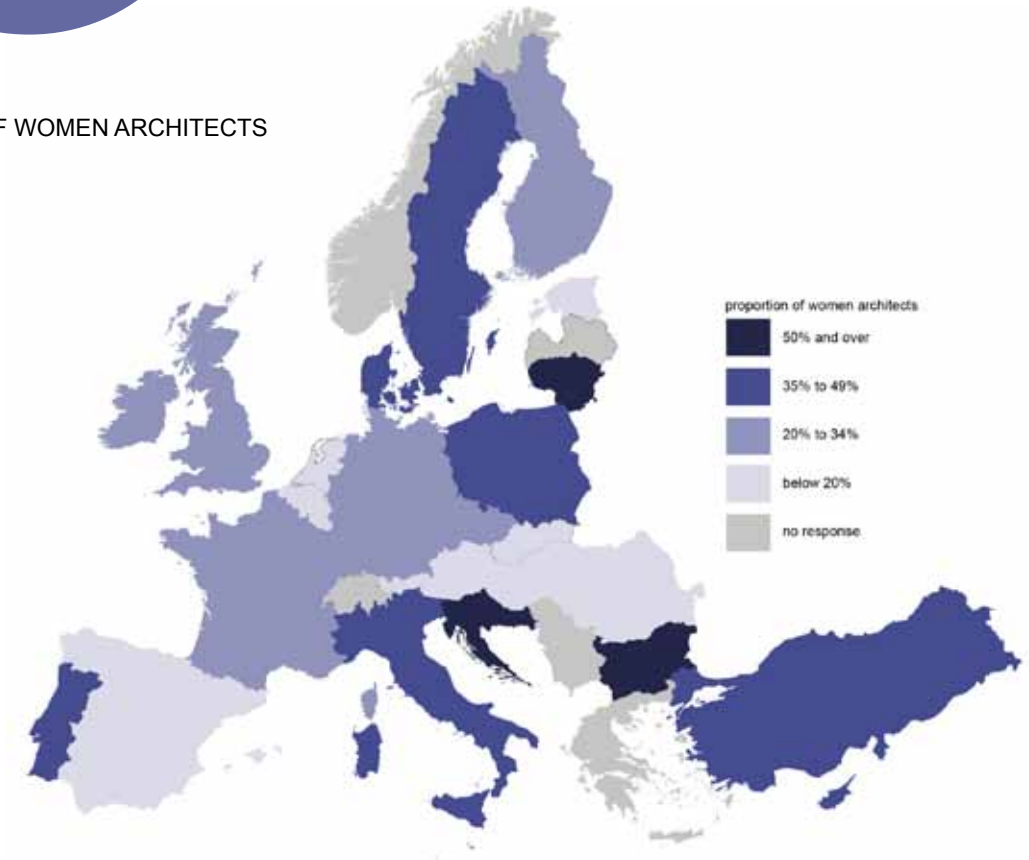
CHART 1-4
MALE / FEMALE SPLIT, ALL RESPONDING ARCHITECTS



A majority of the profession, 62 per cent, is male. Countries with the highest proportion of male architects are Austria, Slovakia and Romania. In four countries, Croatia, Bulgaria, Finland and Slovenia, there are more female architects than males.

The Europe-27 figure is very similar to that in the 2014 survey, but both recent survey years record more female architects than in the period 2008 to 2012.

CHART 1-5
PROPORTION OF WOMEN 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	88	11	1	1
Belgium	93	6	0	1
Bulgaria	77	14	7	2
Croatia	92	6	0	1
Cyprus *	75	11	12	2
Czech Republic *	59	24	0	17
Denmark	81	10	5	4
Estonia *	80	6	0	15
Finland	89	8	2	0
France	89	7	2	2
Germany ***	82	17	1	0
Hungary	66	14	3	18
Ireland	86	10	3	1
Italy	69	20	8	3
Lithuania	87	9	1	2
Luxembourg	91	9	0	0
Malta *	82	16	2	0
Netherlands	71	22	3	4
Poland	82	12	6	0
Portugal	80	9	9	1
Romania *	92	3	0	5
Slovakia	85	9	2	3
Slovenia	86	3	5	6
Spain	70	22	7	0
Sweden	83	13	2	2
Turkey	85	6	6	3
United Kingdom	81	14	2	3
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*

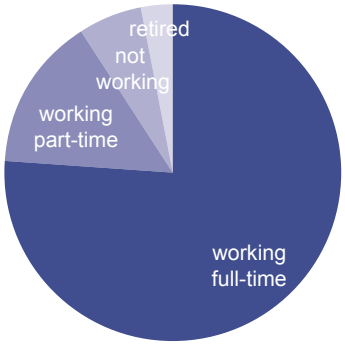
* caution - small sample *** Germany figures are for Partners/Directors/Sole Principals only
** The basis of calculating historical figures (2010 and 2008) has changed. Data is presented as reported and is no longer 'adjusted' . This is discussed in the Appendix.
*** weighted to reflect the total architectural population in all participating countries. The weighting process is explained in the Appendix.

Just over three quarters of the profession is working full-time. This is very similar to the figure recorded in the 2014 and 2012 surveys, but lower than in 2010 or 2008.

In most countries, the proportion of architects working full-time is over 80 per cent - and over 90 per cent in Belgium, Croatia and Luxembourg. The overall full-time average is lowered by Italy (69 per cent full-time) and Spain (70 per cent).

These two countries, along with the Netherlands, have the highest proportions of architects working part-time (20 per cent or more). The highest proportions of architects not working are in Cyprus, Spain and Portugal; each with a reported unemployment rate of 7 per cent of more.

CHART 1-6
EMPLOYMENT STATUS OF ARCHITECTS



1.4 FIELD OF EMPLOYMENT

The largest single field of employment is Sole Principals. Just over a quarter, 26 per cent, of architects describe themselves as a Sole Principal. The highest proportion of architects who are Sole Principals is in Austria. Fifteen per cent of architects are 'freelance', with the highest proportions being in France, the Czech Republic and Slovakia. Ten per cent are agency architects, including 58 per cent of architects in the Netherlands and 41 per cent in Spain.

Nearly one quarter of architects are employed in private practice, either as Associates (6 per cent) or private practice salaried staff (16 per cent). The proportions are highest in the UK and Turkey. Just 8 per cent of architects are Partners or Directors, but this proportion varies markedly between countries. More than 20 per cent of architects in several countries are Partners or Directors - Austria, Ireland, Croatia, Luxembourg and Romania.

About 7 per cent of architects in Europe are employed by central or local government, the highest levels being recorded in Sweden, Finland and Denmark.

The analysis by field of employment is generally very similar to previous years, although the 2016 survey has more architects working as agency or freelance staff than in previous surveys.

CHART 1-7
FIELD OF EMPLOYMENT

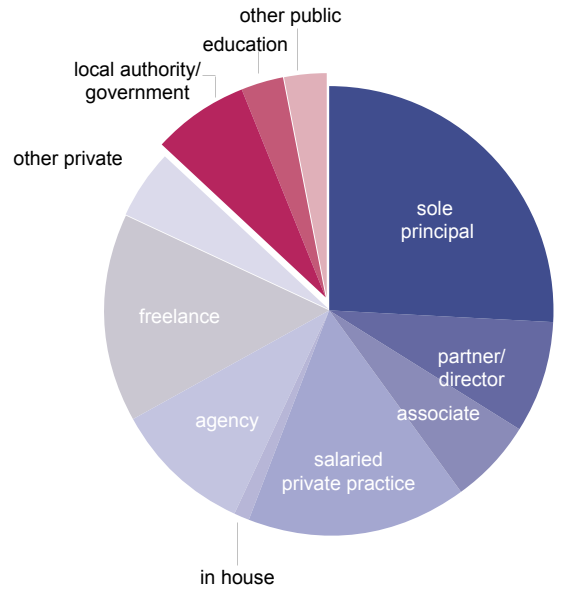


CHART 1-8
MAIN EMPLOYMENT FIELDS BY COUNTRY

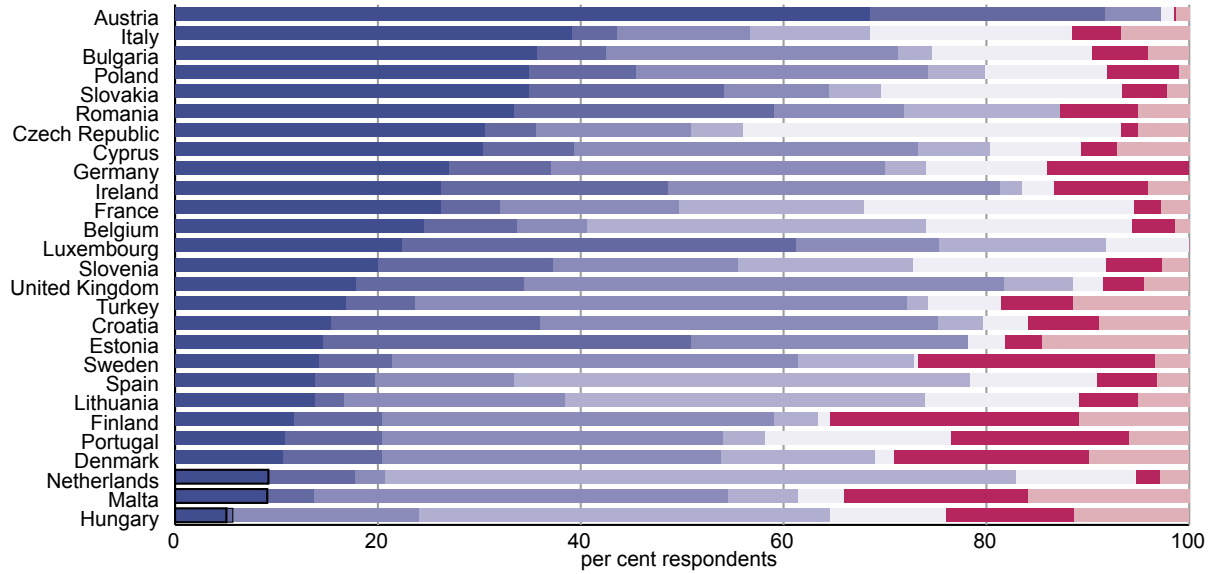


TABLE 1-4
ARCHITECTS' FIELD OF EMPLOYMENT BY COUNTRY

per cent	sole principal	partner director	associate	private practice salaried	in-house	agency	freelance	other private	local authority	central govt	education	other public
Austria	68	23	0	5	0	0	1	0	0	0	1	1
Belgium	25	9	5	1	0	32	20	1	3	1	0	1
Bulgaria	36	7	10	19	0	1	16	2	5	0	3	1
Croatia	15	21	5	34	2	1	4	2	7	0	4	5
Cyprus *	30	9	4	30	2	2	9	4	2	2	2	5
Czech Republic *	31	5	5	10	0	0	37	5	2	0	5	0
Denmark	11	10	2	31	1	4	2	10	17	2	6	4
Estonia *	15	36	20	7	0	0	4	0	4	0	0	15
Finland	12	9	3	35	0	1	1	3	24	1	3	8
France	26	6	11	6	0	17	27	1	3	0	0	2
Germany ***	27	10	<	33	>	12	0	4	0	<	14	>
Hungary	5	1	11	8	1	35	11	4	11	2	1	11
Ireland	26	22	9	23	0	0	3	2	7	2	2	2
Italy	39	4	8	5	2	0	20	10	5	0	2	4
Lithuania	14	3	2	20	0	36	15	0	6	0	4	1
Luxembourg	22	39	13	1	1	15	8	0	0	0	0	0
Malta *	9	5	2	39	0	2	5	5	2	16	9	7
Netherlands	9	9	1	2	2	58	12	3	1	1	1	2
Poland	35	11	3	26	0	1	12	5	7	0	1	1
Portugal	11	10	3	30	1	0	18	3	16	1	3	3
Romania *	33	26	5	8	0	15	0	0	8	0	0	5
Slovakia	35	19	3	7	1	1	24	3	4	1	1	1
Slovenia	20	17	5	14	4	11	19	3	3	3	1	2
Spain	14	6	4	10	0	41	13	3	4	2	2	1
Sweden	14	7	7	33	0	10	0	1	19	5	3	0
Turkey	17	7	1	47	0	0	7	2	6	1	7	5
United Kingdom	18	17	13	34	2	1	3	4	3	1	2	3
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 ** weighted to reflect the total architectural population in all participating countries.
*** Germany figures provided by BAK, sourced from BAK surveys 2015 and 2016. Some staff categories do not match precisely. Germany figures are not included in the EUROPE-27 total.

1.5 YEARS QUALIFIED AS AN ARCHITECT

A little more than a quarter of architects have been qualified for 25 years or more; another quarter have been qualified for between 15 and 24 years. At the other end of the profession, half of Europe's architects have been qualified for fewer than 15 years.

Highest levels of the least experienced architects are recorded in Turkey, Malta, Poland and Cyprus. The highest proportion of the most experienced architects are found in Hungary, Estonia and Lithuania.

CHART 1-9
NUMBER OF YEARS ARCHITECTS HAVE BEEN QUALIFIED

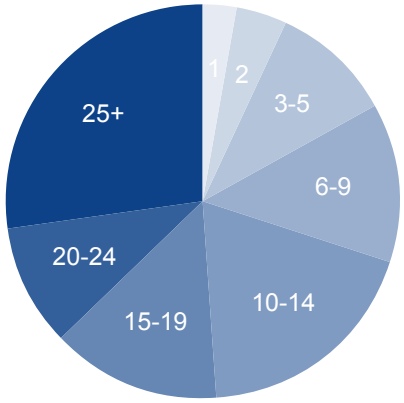


TABLE 1-5
NUMBER OF YEARS QUALIFIED AS AN ARCHITECT, ANALYSED BY COUNTRY

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	3	4	9	10	16	20	14	24
Belgium	1	0	10	12	13	11	11	42
Bulgaria	4	6	11	12	16	7	8	35
Croatia	0	0	12	13	19	11	13	32
Cyprus *	10	7	24	10	8	7	15	19
Czech Republic *	0	0	7	25	22	8	5	32
Denmark	6	5	8	11	10	13	12	36
Estonia *	9	0	0	4	27	2	4	55
Finland	2	1	8	11	13	16	11	38
France	4	3	8	15	15	13	9	33
Germany ***	0	0	6	13	16	17	15	32
Hungary	1	0	4	5	10	13	11	55
Ireland	1	1	4	8	14	19	16	37
Italy	2	3	9	13	19	16	13	26
Lithuania	0	2	0	7	31	4	9	47
Luxembourg	0	0	5	6	18	26	13	33
Malta *	4	4	20	4	16	18	7	27
Netherlands	4	5	10	14	15	11	11	31
Poland	10	12	15	17	14	8	8	19
Portugal	5	5	14	14	18	17	10	17
Romania *	0	0	5	8	31	13	3	41
Slovakia	1	0	4	9	22	18	13	33
Slovenia	0	0	5	16	12	16	20	31
Spain	3	8	13	13	26	14	5	18
Sweden	1	2	10	11	13	14	9	42
Turkey	12	12	17	13	10	8	7	22
United Kingdom	4	6	10	12	10	9	10	38
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 *** Germany figures provided by BAK, sourced from BAK surveys 2015 and 2016
** weighted to reflect the total architectural population in all participating countries.

1.6 AGE PROFILE OF ARCHITECTS

Thirty six per cent of Europe's architects are aged under 40, and half are aged under 45. The age profile rises steeply through the younger ages, peaking at age 35 to 44. The distribution then drops off, more gradually. Countries with high proportions of younger architects include Turkey, Poland, Cyprus, Malta, Portugal and Spain. This year's age profile is very similar to that in previous surveys.

The age profile for women is younger than it is for men; female architects' age peaks at age 40 to 44; male architects ten years later, at 50 to 54.

CHART 1-10
AGE PROFILE OF ARCHITECTS

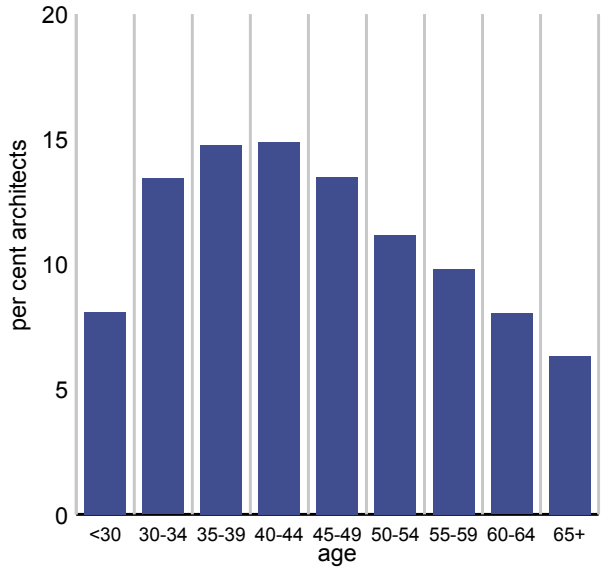


CHART 1-11
PROPORTION OF ARCHITECTS AGED UNDER 40

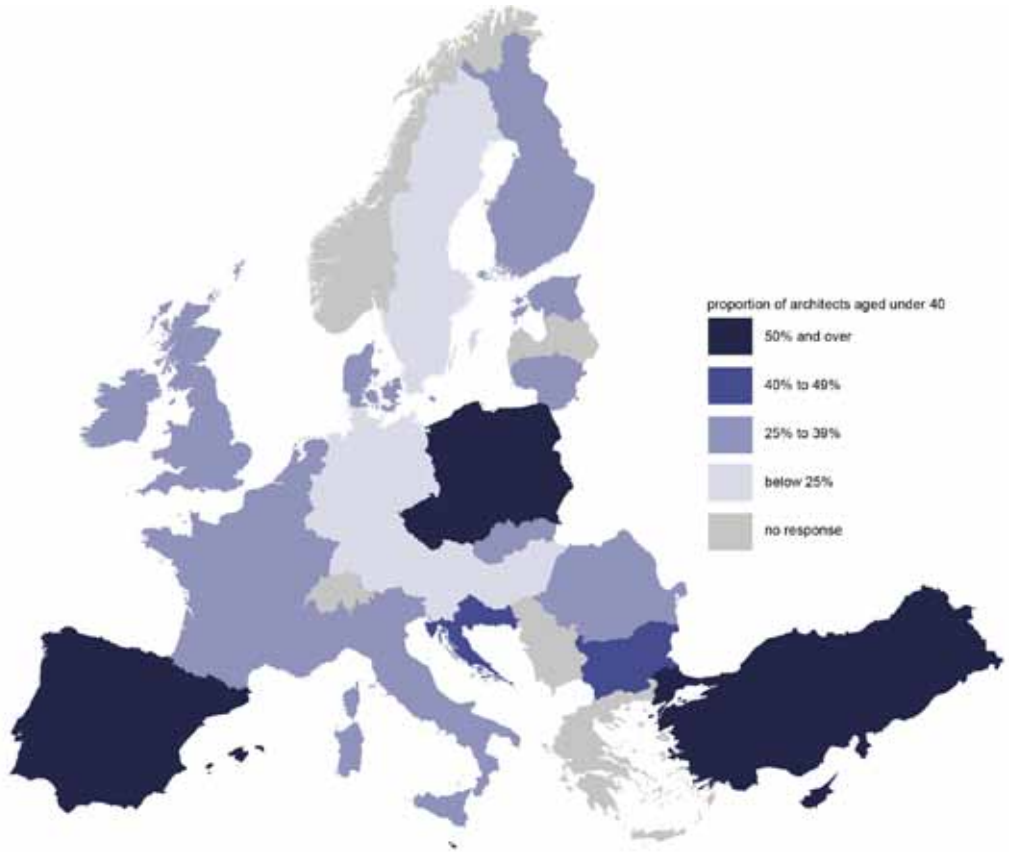
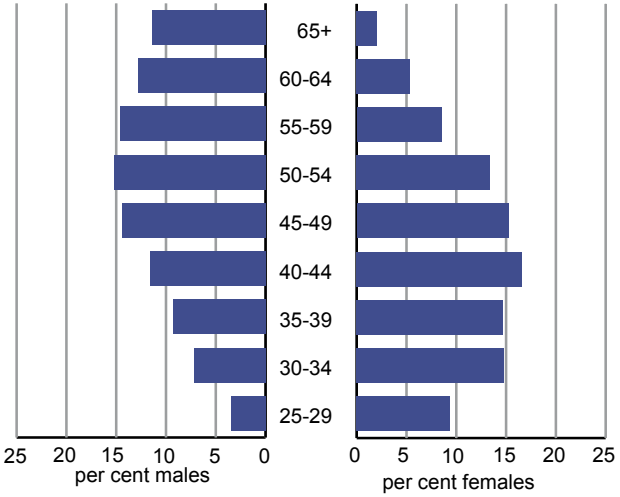


TABLE 1-6
AGE OF ARCHITECTS ANALYSED BY COUNTRY

per cent	age of architects								
	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	2	2	10	19	17	18	12	11	9
Belgium	9	15	12	12	12	12	13	10	6
Bulgaria	12	22	11	5	9	12	10	12	8
Croatia	7	14	19	11	9	17	12	7	5
Cyprus *	31	19	8	7	7	14	5	7	3
Czech Republic *	0	32	20	10	5	5	7	3	17
Denmark	7	11	10	13	12	11	13	12	11
Estonia *	2	15	15	2	4	4	22	4	35
Finland	5	11	9	11	14	16	13	19	3
France	6	14	14	12	11	12	11	12	8
Germany ***	1	9	13	15	16	18	14	9	5
Hungary	4	6	15	7	11	10	13	17	17
Ireland	2	8	16	19	12	13	10	12	7
Italy	5	11	12	16	17	13	11	8	6
Lithuania	3	23	12	8	7	13	24	6	4
Luxembourg	0	6	8	31	15	8	20	7	5
Malta *	24	16	18	9	4	9	11	4	4
Netherlands	10	11	18	13	10	9	7	13	9
Poland	34	18	14	6	7	7	5	5	6
Portugal	15	17	21	16	11	8	7	3	2
Romania *	0	5	28	18	8	5	3	18	15
Slovakia	3	13	17	18	12	5	13	13	7
Slovenia	3	9	12	19	19	18	8	5	8
Spain	13	17	20	19	12	7	8	3	3
Sweden	3	9	13	11	10	13	13	16	11
Turkey	42	15	9	9	7	5	7	4	4
United Kingdom	7	17	13	9	10	11	10	9	14
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 *** Germany figures provided by BAK, sourced from BAK surveys 2015 and 2016.
** weighted to reflect the total architectural population in all participating countries.

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



|2| ARCHITECTURE - THE MARKET

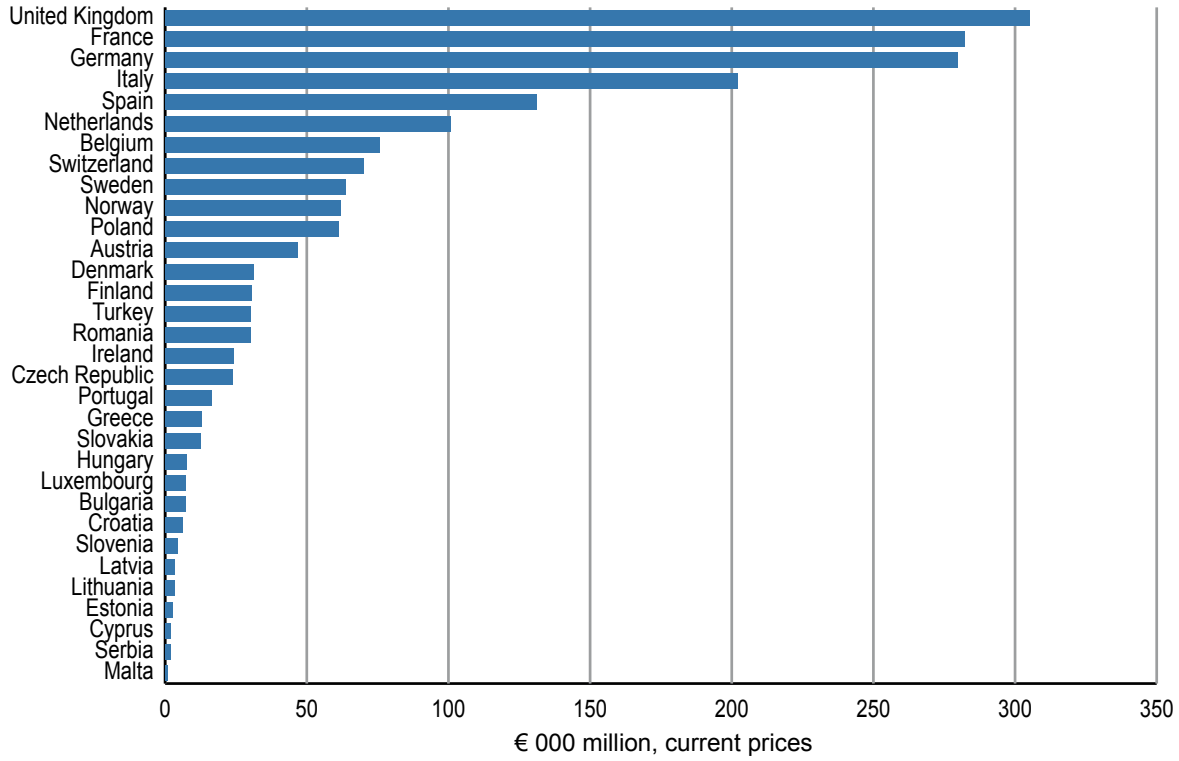
Architect: Aries Ltd
Project: Pine Beach Elo Reort
Photo: Tamas Bujnovszeky
Place: Pakoštane, Croatia

2.1 THE CONSTRUCTION MARKET IN EUROPE

The total value of the European construction market ('EUROPE - 32') is estimated to be worth €1 939 billion in 2016. This includes civil engineering and infrastructure work.

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

CHART 2-1
ESTIMATED SIZE OF CONSTRUCTION MARKET, EUROPE, 2016



Base: all 32 European countries
Source: Mirza & Nacey estimates based on data sourced from Eurostat, Turkstat and Statistical Office of the Republic of Serbia updated using the most recent Eurostat Construction Output Production Indices.

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

€ million	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015 est *	2016 est **
Austria	37 042	40 603	45 137	43 928	43 654	44 931	46 814	47 257	48 248	48 527	46 745
Belgium	49 307	53 227	58 141	58 062	59 531	66 014	65 947	65 293	68 071	67 793	75 711
Bulgaria	6 363	8 851	11 767	10 397	7 966	7 828	7 764	6 603	7 790	8 003	7 067
Croatia	8 284	8 969	10 425	8 837	6 856	6 410	5 906	5 556	5 914	5 910	6 207
Cyprus	3 903	4 661	5 280	4 152	3 930	3 374	2 786	2 041	1 832	1 835	2 056
Czech Republic	26 523	32 020	36 672	32 024	33 084	32 512	28 949	26 880	26 125	28 460	23 658
Denmark	31 083	32 167	32 470	27 244	25 679	27 394	27 622	27 634	28 270	28 677	31 242
Estonia	3 031	3 780	3 548	2 285	2 025	2 658	3 084	3 178	3 085	2 923	2 768
Finland	25 752	29 703	31 819	27 570	27 998	30 130	30 303	29 728	28 794	29 216	30 558
France	247 409	270 093	283 736	264 335	264 969	279 230	279 221	282 417	275 235	267 244	282 377
Germany	199 117	207 877	221 117	221 003	231 376	251 671	260 057	264 450	274 340	278 365	279 619
Greece	43 009	41 191	34 799	31 780	20 959	16 868	14 960	12 731	11 395	10 866	12 926
Hungary	11 195	11 214	11 880	10 286	9 153	8 663	7 938	8 797	9 788	10 114	7 559
Ireland	47 720	49 642	41 004	16 526	12 096	10 877	14 816	16 949	19 236	20 738	24 200
Italy	261 318	274 065	277 718	257 869	253 789	255 297	229 554	212 194	199 657	199 335	202 126
Latvia	4 919	7 195	7 883	4 456	3 589	4 505	4 835	5 149	5 427	5 364	3 491
Lithuania	4 125	5 778	6 353	3 070	2 754	3 408	3 333	3 782	4 482	4 204	3 479
Luxembourg	4 186	4 868	5 135	4 998	4 859	5 379	5 210	5 416	6 173	6 694	7 284
Malta	716	724	780	781	793	828	842	857	878	1 018	1 043
Netherlands	83 751	91 580	98 935	96 326	87 521	91 131	83 931	79 002	80 232	85 041	100 870
Norway	34 054	41 319	43 746	37 109	40 974	47 973	57 008	57 100	56 496	57 316	61 934
Poland	46 309	59 062	73 104	62 183	77 413	84 485	79 460	75 085	76 333	77 218	61 170
Portugal	33 376	33 510	33 674	30 992	30 333	27 104	20 763	18 284	16 878	16 893	16 342
Romania	16 401	24 548	32 861	26 896	31 491	30 894	30 276	28 193	23 563	31 086	30 014
Serbia (1)	n/a	n/a	n/a	n/a	n/a	1 953	1 974	1 668	1 744	2 029	1 945
Slovakia	9 019	10 579	14 213	13 918	13 351	13 755	12 775	11 959	12 444	14 636	12 418
Slovenia	6 793	8 733	9 830	8 240	7 084	6 101	5 654	5 285	5 535	5 554	4 339
Spain	364 805	371 031	328 204	281 543	213 668	176 656	143 848	124 258	122 981	124 457	131 177
Sweden	36 720	41 164	40 263	33 516	39 956	43 729	44 906	45 418	46 639	52 717	63 559
Switzerland	36 542	36 152	39 328	42 081	48 034	57 474	60 352	60 878	63 391	72 159	70 218
Turkey (2)	18 184	23 315	23 572	16 958	23 120	24 752	27 160	27 753	27 495	28 737	30 221
United Kingdom	298 934	327 698	282 052	220 015	235 603	241 393	265 030	264 260	295 094	305 900	305 069
EUROPE - 32 (€ 000 million)	2 000	2 155	2 145	1 899	1 864	1 905	1 873	1 826	1 854	1 899	1 939

Source of all data except Turkey and Serbia: Eurostat, National Accounts (NACE 64) - aggregates at current prices. Copyright © Eurostat. All Rights Reserved.

* Data for 2015 (and, in some cases, 2014): Mirza & Nacey estimates derived from the most recent Eurostat Construction Output Production Indices.

** Data for 2016: Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices.

(1) Source: Derived from raw data sourced from Statistical Office of the Republic of Serbia. Raw data converted to Euros using conversion rates as at 30.06 each year.

(2) Source: Derived from raw data sourced from TurkStat, the Turkish Statistical Institute. Raw data (not reproduced here) is Copyright © TURKSTAT. Raw data converted from Turkish Lira to Euros using conversion rates as at 30.06 each year.

Construction output includes civil engineering and infrastructure work.

Construction output in Europe-32 has started to rise, very gradually, in the last four years. Whilst still a way short of the 2007-08 peak values, construction output is trending up. The rise between 2014 and 2016 is 5 per cent. The map, chart 2-3, shows a striking pattern of little or no change between 2014 and 2016 in several central European countries notably France, Germany and Italy; growth in countries on the northern, western and southern periphery of Europe; and falls in much of Eastern Europe. There are exceptions; construction output in Portugal continues to fall while Romania bucks the trend in the east to record rising values.

CHART 2-2
CHANGE IN CONSTRUCTION OUTPUT IN EUROPE-32, 2006 TO 2016

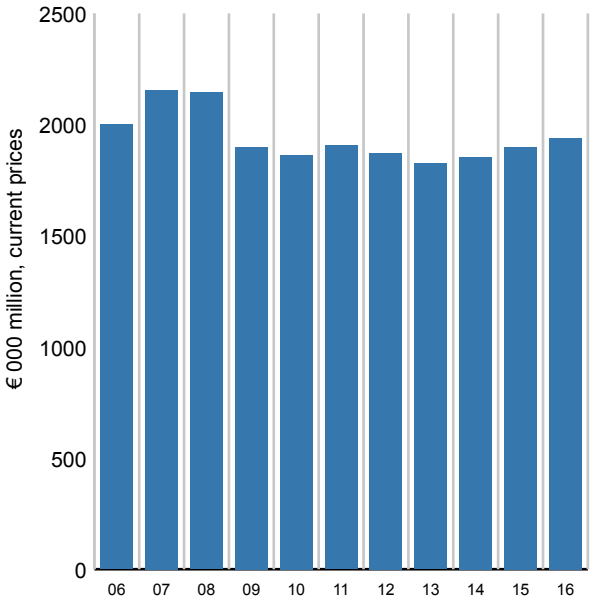
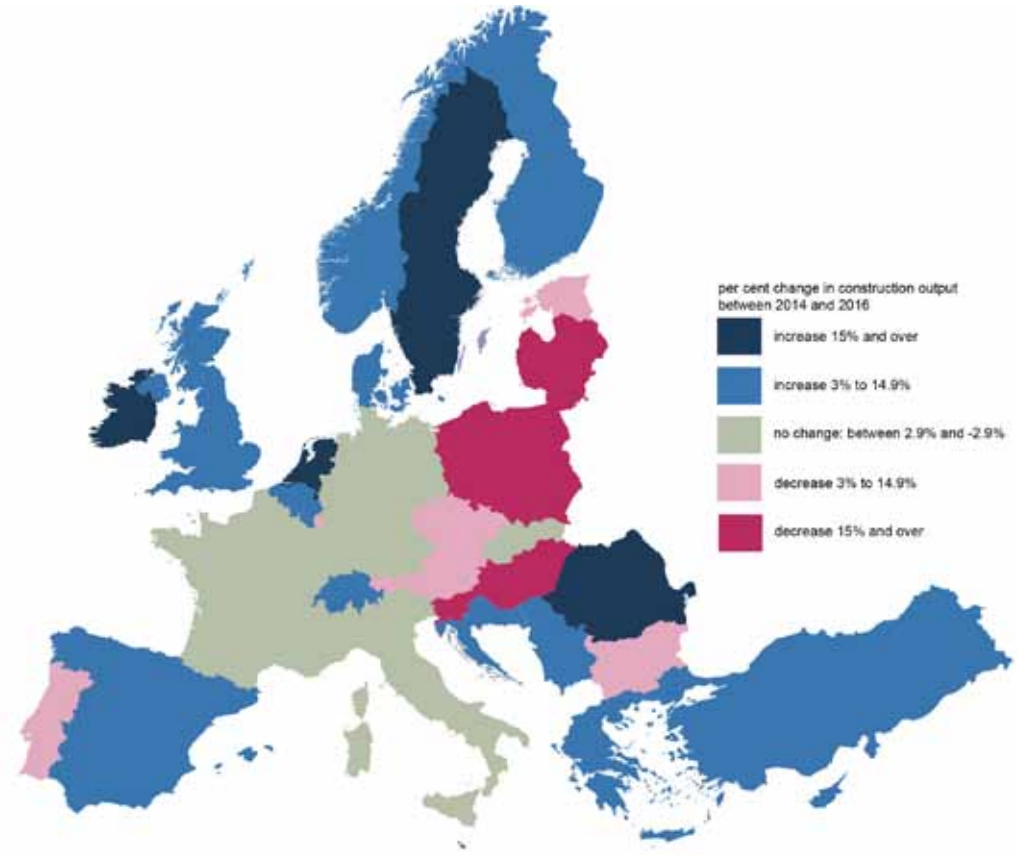


CHART 2-3
CHANGES IN CONSTRUCTION OUTPUT, 2014 TO 2016



Base for both map above and chart left: all 32 European countries
Source: Mirza & Nacey estimates based on data sourced from Eurostat, Turkstat and Statistical Office of the Republic of Serbia updated using the most recent Eurostat Construction Output Production Indices.

TABLE 2-2
ESTIMATED SIZE OF CONSTRUCTION MARKET, 2016 BY COUNTRY, AND COMPARATIVE VALUES

	construction output (estimated € million)	population (number as at 01.01.2016)	construction output per head of population (€)	architects (estimated number)
Austria	46 745	8 700 471	5 373	5 200
Belgium	75 711	11 289 853	6 706	15 100
Bulgaria	7 067	7 153 784	988	2 000
Croatia	6 207	4 190 669	1 481	2 200
Cyprus	2 056	848 319	2 424	950
Czech Republic	23 658	10 553 843	2 242	8 300
Denmark	31 242	5 707 251	5 474	10 000
Estonia	2 768	1 315 944	2 104	800
Finland	30 558	5 487 308	5 569	3 500
France	282 377	66 661 621	4 236	30 000
Germany	279 619	82 162 000	3 403	109 200
Greece	12 926	10 793 526	1 198	18 200
Hungary	7 559	9 830 485	769	4 200
Ireland	24 200	4 658 530	5 195	2 500
Italy	202 126	60 665 551	3 332	157 000
Latvia	3 491	1 968 957	1 773	900
Lithuania	3 479	2 888 558	1 204	1 350
Luxembourg	7 284	576 249	12 641	950
Malta	1 043	434 403	2 401	650
Netherlands	100 870	16 979 120	5 941	11 200
Norway	61 934	5 213 985	11 878	3 740
Poland	61 170	37 967 209	1 611	14 000
Portugal	16 342	10 341 330	1 580	22 200
Romania	30 014	19 759 968	1 519	7 600
Serbia	1 945	7 076 372	275	8 000
Slovakia	12 418	5 426 252	2 288	1 650
Slovenia	4 339	2 064 188	2 102	1 350
Spain	131 177	46 438 422	2 825	53 800
Sweden	63 559	9 851 017	6 452	6 550
Switzerland	70 218	8 325 194	8 434	7 300
Turkey	30 221	78 741 053	384	50 000
United Kingdom	305 069	65 341 183	4 669	36 700
EUROPE - 32 - 2016	1 939 393	609 412 615	3 182	598 700

Source: Construction output and population data - Eurostat Copyright © Eurostat. All Rights Reserved. Data for Serbia was sourced from Statistical Office of the Republic of Serbia. Data for Turkey derived from raw data from Turkstat. In both cases data has been converted to Euros using historical exchange rates as at mid year. Data for 2016 are Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices. The total for EUROPE-32 is Mirza & Nacey estimate.

Construction output includes civil engineering and infrastructure work.

2.2 THE ARCHITECTURAL MARKET IN EUROPE

The total value of the architectural market in the 27 surveyed countries is estimated to be €15.6 billion in 2016. This relates to the total 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). Grossing up this figure to reflect all 32 European countries, the total estimated value of the architectural market in Europe is €16.8 billion.

This year's Europe-32 figure is 12 per cent higher than in 2014, and is the highest figure recorded since 2008. Most countries have seen an increase between 2014 and 2016. The largest market is in Germany (€5.0 billion) followed by the United Kingdom (€2.2 billion) and Italy (€1.8 billion). These have been the three largest markets in each of the previous surveys.

CHART 2-4
VALUE OF ARCHITECTURAL MARKET, AVERAGE PER ARCHITECT

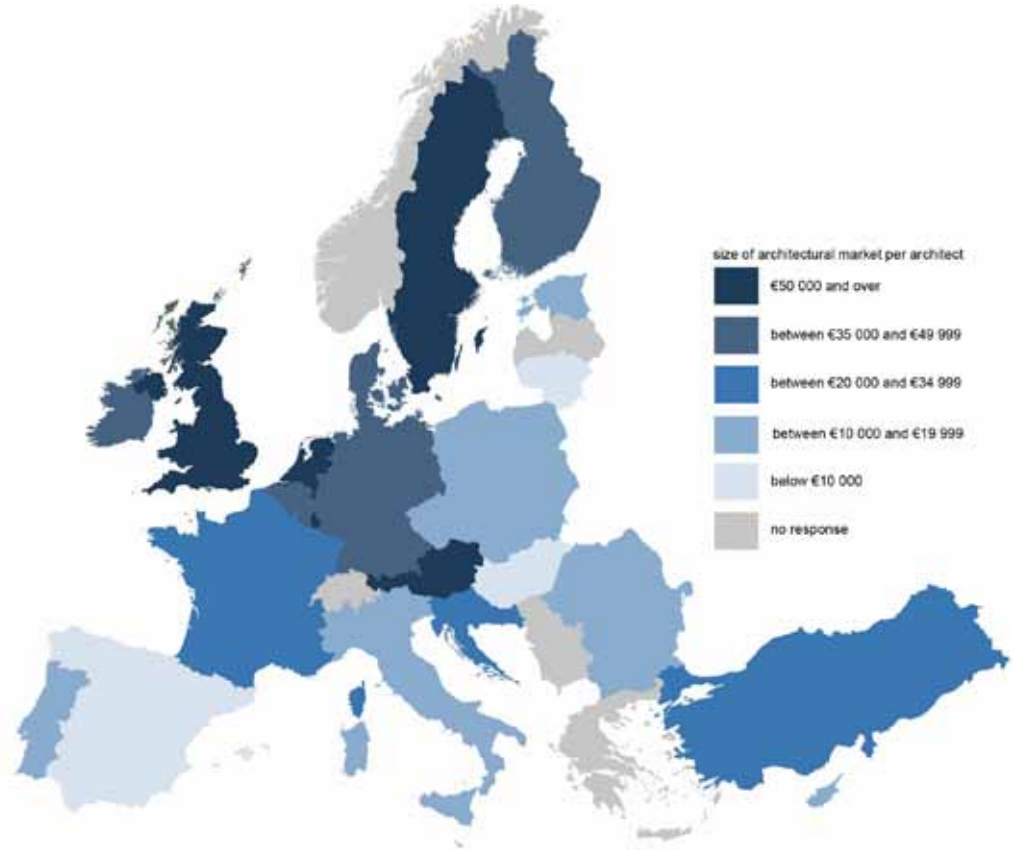
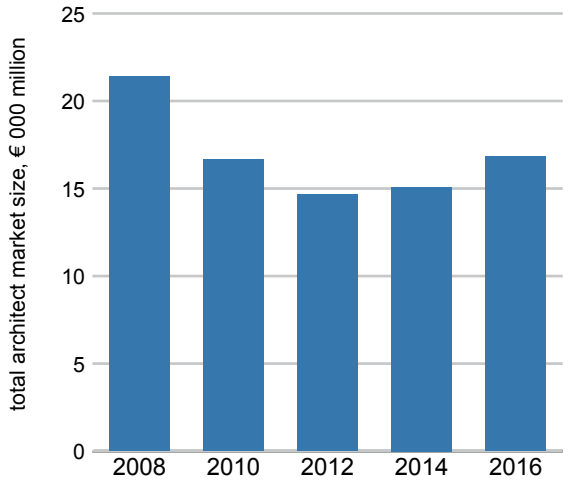


CHART 2-5
CHANGE IN ESTIMATED VALUE OF ARCHITECTURAL MARKET IN EUROPE-32, 2008-16



Base: all 32 European countries
Source: Mirza & Nacey estimates based on survey data

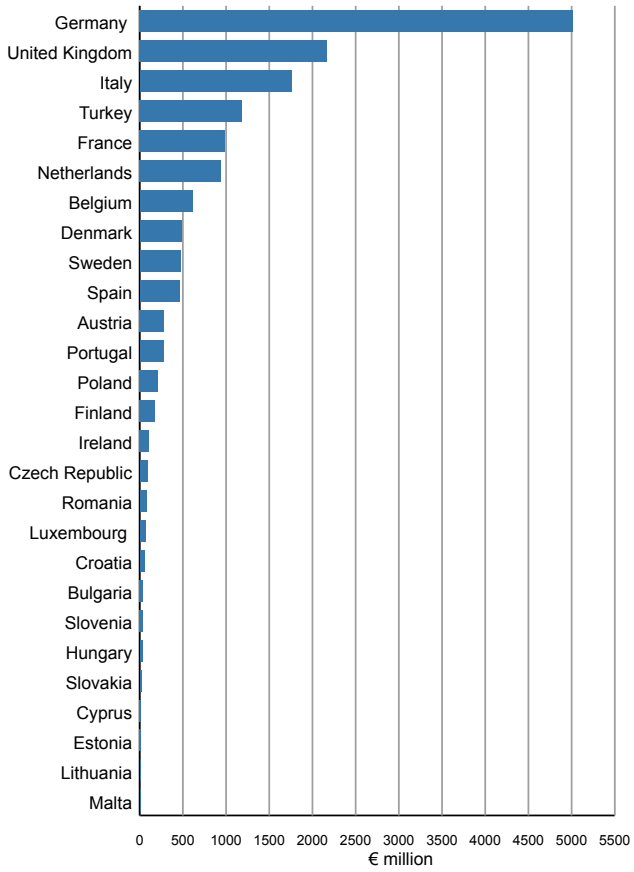
* Methodological Note: The base 'EUROPE-32' is different from the base used for previous surveys. Figures for 2008, 2010, 2012 and 2014 have been re-calculated using the 2016 base number of countries, so will be different from estimates published in previous survey reports.

TABLE 2-3
ESTIMATED SIZE OF ARCHITECTURAL MARKET 2016, BY COUNTRY, AND COMPARATIVE VALUES

	market size (€000s)	value per architect (€)	value per 1000 population (€)	architectural market as per cent construction	*2014 market size (€000s)*	*2012 market size (€000s)*	*2010 market size (€000s)*	*2008 market size (€000s)*
Austria	279 307	53 713	32 103	0.6	*281 241*	*262 774*	*256 292*	*296 789*
Belgium	610 346	40 420	54 062	0.8	*436 306*	*529 292*	*556 280*	*327 108*
Bulgaria	36 905	18 452	5 159	0.5	*20 358*	*26 792*	*46 116*	*n/a*
Croatia	54 841	24 928	13 086	0.9	*44 798*	*50 235*	*64 290*	*n/a*
Cyprus *	17 859	18 799	21 053	0.9	*n/a*	*n/a*	*n/a*	*n/a*
Czech Republic *	92 210	11 110	8 737	0.4	*139 458*	*153 433*	*73 045*	*n/a*
Denmark	482 321	48 232	84 510	1.5	*392 062*	*447 607*	*308 697*	*356 228*
Estonia *	14 396	17 995	10 940	0.5	*16 330*	*29 277*	*12 667*	*27 524*
Finland	178 017	50 862	32 442	0.6	*133 689*	*161 704*	*117 456*	*42 580*
France	984 215	32 807	14 764	0.3	*907 837*	*1 254 376*	*1 301 699*	*1 103 778*
Germany	5 015 212	45 927	61 041	1.8	*5 047 349*	*4 192 657*	*4 094 601*	*3 988 103*
Hungary	33 267	7 921	3 384	0.4	*n/a*	*60,566*	*n/a*	*n/a*
Ireland	110 600	44 240	23 741	0.5	*90 682*	*112 102*	*172 362*	*408 855*
Italy	1 758 087	11 198	28 980	0.9	*1 916 761*	*2 775 280*	*2 708 910*	*n/a*
Lithuania	10 641	7 882	3 684	0.3	*n/a*	*9,676*	*11,455*	*n/a*
Luxembourg	68 308	71 903	118 538	0.9	*49 361*	*38 264*	*n/a*	*31 828*
Malta *	9 659	14 860	22 234	0.9	*13 050*	*15 565*	*n/a*	*13 320*
Netherlands	939 867	83 917	55 354	0.9	*910 000*	*807 000*	*976 000*	*902 000*
Poland	212 481	15 177	5 596	0.3	*n/a*	*210,575*	*258,803*	*n/a*
Portugal	276 051	12 435	26 694	1.7	*176 636*	*261 110*	*n/a*	*n/a*
Romania *	76 954	10 126	3 894	0.3	*79 471*	*90 111*	*63 551*	*112 659*
Slovakia	22 058	13 368	4 065	0.2	*15 211*	*n/a*	*41 000*	*n/a*
Slovenia	35 700	26 440	17 295	0.8	*24 874*	*42 110*	*10 359*	*40 501*
Spain	461 124	8 571	9 930	0.4	*332 999*	*336 420*	*n/a*	*n/a*
Sweden	470 484	71 830	47 760	0.7	*347 110*	*330 785*	*356 300*	*145 073*
Turkey	1 182 989	23 660	15 024	3.9	*888 440*	*856 591*	*960 371*	*726 778*
United Kingdom	2 169 202	59 106	33 198	0.7	*1 978 835*	*2 006 403*	*1 955 929*	*2 800 042*
2016 EUROPE-27	15 603 101	27 300	26 651	0.9				
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 revenue earned by private architectural practices in each country. Data refers to 2015/16. 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

Architects' work is weighted towards refurbishment; 59 per cent of work is refurbishment, compared with 41 per cent new build. There has been an increase in the proportion of new build work since the 2014 survey. Highest levels of new build are recorded by architects in Turkey and Poland, where new build has a 70 per cent share of work. More than 70 per cent of work in Italy is refurbishment.

Private housing dominates the market, and in particular one-off housing. This includes one-off houses, extensions and loft conversions. This sector alone accounts for 39 per cent of all work; other private housing (multiple houses, flats, housing developments) is a further 16 per cent of work so private housing overall represents 55 per cent of all work undertaken by Europe's architects. Private housing has consistently been the largest single work sector in all five surveys; up to 2010 private housing accounted for about 45 per cent of work; since 2012, the proportion has grown to over 50 per cent.

Offices and retail work each account for 7 per cent of total work; the overall share of private non-housing and commercial work totals 32 per cent. Eight per cent of work is public sector, plus another 7 per cent from health and education. The highest share of private housing work is undertaken by architects in Belgium and the UK (over 60 per cent); architects in Hungary and Poland have the highest proportion of commercial and other private work. The public sector accounts for 40 per cent or more of work in Finland and Denmark.

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

per cent	new build	refurbishment
Austria	54	46
Belgium	46	54
Bulgaria	56	44
Croatia	54	46
Cyprus *	62	38
Czech Republic *	43	57
Denmark	49	51
Estonia *	56	44
Finland	55	45
France	45	55
Germany	46	54
Hungary	52	48
Ireland	42	58
Italy	21	79
Lithuania	59	42
Luxembourg	56	44
Malta *	54	46
Netherlands	47	53
Poland	70	30
Portugal	38	62
Romania *	66	34
Slovakia	59	41
Slovenia	53	47
Spain	35	65
Sweden	55	45
Turkey	70	30
United Kingdom	39	61
2016 EUROPE-27	41	59
2014 EUROPE-26	*37*	*63*
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 2-5
MARKET SHARE AND INVOLVEMENT
BY BUILDING SECTOR

per cent	per cent of market	per cent of practices involved
private housing	55	87
offices	7	33
retail	7	23
leisure and the arts	4	15
industrial	5	22
health	3	10
education	4	17
public housing	2	9
other private	9	31
other public	6	14

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

CHART 2-7
PROPORTION OF MARKET BY BUILDING SECTOR

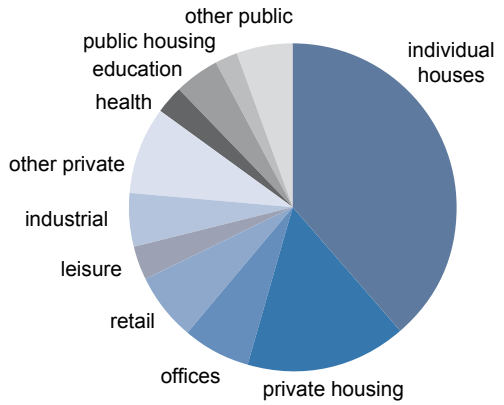
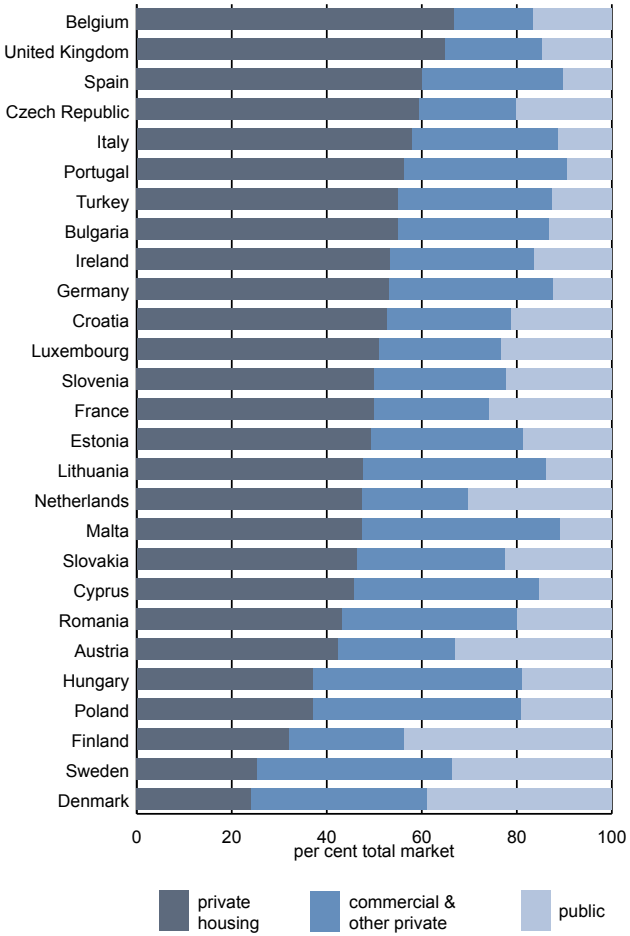


TABLE 2-6
PROPORTION OF WORK UNDERTAKEN BY BUILDING SECTOR, ANALYSED BY COUNTRY

per cent	individual houses, extensions, loft conversions	private housing	offices	retail	leisure	industrial	health	education	public housing	other private	other public	TOTAL
Austria	30	13	7	4	3	5	5	7	13	5	8	100
Belgium	54	13	4	4	1	5	3	4	5	3	4	100
Bulgaria	37	18	5	7	2	13	1	2	4	4	6	100
Croatia	36	17	5	2	5	5	2	6	1	10	13	100
Cyprus *	42	4	4	1	8	7	3	6	0	19	7	100
Czech Republic *	49	10	5	2	3	7	6	3	1	4	10	100
Denmark	16	8	14	3	7	4	7	12	7	8	12	100
Estonia *	40	9	7	2	6	10	0	8	1	7	10	100
Finland	20	12	7	4	4	2	8	9	11	7	16	100
France	36	14	7	5	4	4	5	6	6	5	9	100
Germany	32	21	10	3	5	7	3	7	2	9	0	100
Hungary	26	11	6	6	8	16	1	7	0	8	11	100
Ireland	46	8	7	8	4	3	6	7	1	8	3	100
Italy	42	16	5	8	2	4	1	2	1	12	8	100
Lithuania	35	12	10	4	4	9	2	2	2	11	8	100
Luxembourg	37	14	11	4	2	3	2	9	5	7	8	100
Malta *	38	10	26	8	0	2	0	1	0	5	10	100
Netherlands	38	10	3	3	4	6	5	8	6	7	12	100
Poland	15	22	10	5	3	13	7	3	3	13	6	100
Portugal	45	11	4	12	5	6	2	3	1	7	4	100
Romania *	32	11	12	9	3	10	6	6	3	4	5	100
Slovakia	37	10	10	5	4	6	3	4	8	5	7	100
Slovenia	44	6	16	2	3	4	3	8	1	3	10	100
Spain	46	14	5	12	2	2	2	3	1	9	5	100
Sweden	15	10	13	6	7	4	4	9	8	11	13	100
Turkey	37	18	7	11	3	6	2	3	2	5	6	100
United Kingdom	52	13	4	4	5	2	4	6	2	5	3	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

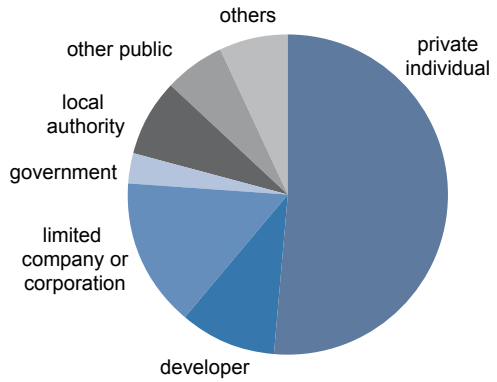


TABLE 2-7
MARKET SHARE AND INVOLVEMENT BY CLIENT TYPE

per cent	per cent of market	per cent of practices involved
individuals	52	87
developer	10	33
limited company / PLC	15	23
central government	3	15
local government	8	22
other public	6	10
other private	7	17

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	44	10	16	14	8	3	6	100
Belgium	62	13	6	2	7	7	3	100
Bulgaria	42	19	16	2	11	5	5	100
Croatia	46	1	27	2	17	4	2	100
Cyprus *	56	20	9	2	4	8	1	100
Czech Republic*	64	3	8	2	8	12	3	100
Denmark	25	10	16	11	18	11	10	100
Estonia *	53	10	7	4	21	2	4	100
Finland	23	16	17	5	16	20	3	100
France	45	10	10	1	11	12	9	100
Germany	52	8	16	4	11	0	8	100
Hungary	36	10	20	2	16	7	1	100
Ireland	52	11	15	5	4	6	7	100
Italy	59	8	13	1	5	6	8	100
Lithuania	52	11	19	4	7	3	5	100
Luxembourg	46	20	5	9	9	8	4	100
Malta *	39	30	19	6	0	6	0	100
Netherlands	46	15	4	3	8	11	13	100
Poland	16	29	29	1	18	6	1	100
Portugal	50	14	19	1	5	4	6	100
Romania *	50	13	17	4	8	5	3	100
Slovakia	45	18	17	3	11	2	4	100
Slovenia	57	4	17	7	9	4	1	100
Spain	64	7	12	1	7	4	5	100
Sweden	17	15	29	9	13	13	4	100
Turkey	41	13	27	4	3	5	5	100
United Kingdom	50	17	11	3	3	11	6	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

Building design dominates the list of services offered, accounting for 62 per cent of work undertaken by architects in Europe. This is a higher proportion than in the last two surveys. In Belgium, Poland, Austria, Luxembourg and the Czech Republic, more than 70 per cent of architects' work is building design.

Only one other service offered is significant; interior design, which accounts for 11 per cent of work. Interior design accounts for a higher proportion of work in Italy (19 per cent) than in any other country. Other services account for 27 per cent of work; project management represents 10 per cent or more of work in Malta and Denmark; planning in Romania and Sweden; while certification is a major source of work in Hungary and property valuation in Malta.

CHART 2-10
PROPORTION OF MARKET BY TYPE OF SERVICE

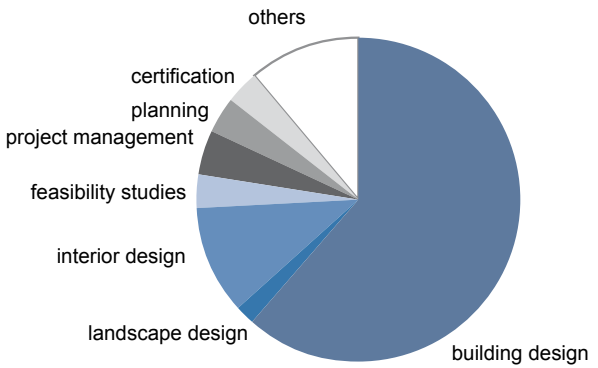


TABLE 2-9
PROPORTION OF WORK UNDERTAKEN BY EACH SERVICE TYPE

per cent	building design	landscape design	interior design	feasibility studies	project management	planning	certification	property valuation	other service	TOTAL
Austria	73	1	6	5	3	2	4	1	5	100
Belgium	75	1	7	4	5	2	1	1	6	100
Bulgaria	70	1	9	5	4	6	0	1	3	100
Croatia	59	4	10	0	5	9	6	1	6	100
Cyprus *	52	2	11	3	4	2	10	1	14	100
Czech Republic *	71	8	8	0	7	1	0	0	5	100
Denmark	47	5	8	2	10	8	3	2	15	100
Estonia *	82	1	3	1	1	6	2	0	3	100
Finland	67	2	6	3	3	9	0	0	8	100
France	70	1	8	8	5	2	0	0	6	100
Germany	86	1	4	0	1	2	2	1	4	100
Hungary	49	1	3	1	6	3	22	2	14	100
Ireland	67	3	6	5	6	1	4	0	9	100
Italy	41	3	19	4	6	3	5	5	14	100
Lithuania	57	5	15	2	8	6	0	0	5	100
Luxembourg	71	1	5	5	7	7	1	1	3	100
Malta *	45	2	7	1	15	0	3	17	10	100
Netherlands	60	2	12	6	6	3	0	0	10	100
Poland	74	0	8	1	2	9	0	0	4	100
Portugal	53	1	14	4	6	7	5	2	7	100
Romania *	66	1	6	7	4	12	0	0	4	100
Slovakia	59	6	14	3	6	8	0	0	4	100
Slovenia	56	3	13	10	9	6	1	0	2	100
Spain	59	1	5	2	3	4	9	4	13	100
Sweden	67	2	8	5	4	10	1	0	4	100
Turkey	63	3	14	2	8	3	1	1	6	100
United Kingdom	69	2	6	8	2	3	2	0	8	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*

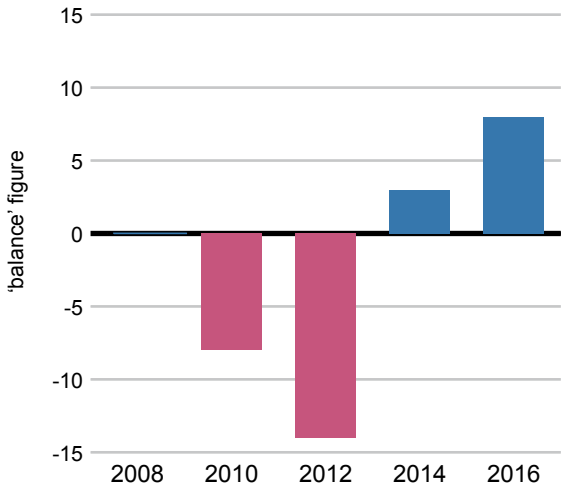
* caution - small sample

2.6 FUTURE PROSPECTS

The mood amongst architects is distinctly more positive than it has been in any of the previous surveys. The 'balance' figure of +8 represents the difference between the proportion of architects who expect an increase in their workloads and the proportion who expect workloads to fall. The relatively modest balance figure - albeit the highest since the survey began in 2008 - disguises the fact that 18 out of 27 countries record positive 'balance' figures of +15 or more. Furthermore, only two countries record a negative 'balance' figure this year.

Those two negative countries are Italy ('balance' figure of -13) and the UK (-5). The negative prospects for the UK probably reflect uncertainty in the lead up to Brexit. Neighbouring Ireland, by contrast, reports the highest positive 'balance' figure, of +59. Ireland's' balance figure is well ahead of that in any other country; the next highest balance figures are in the mid thirties, reported by architects in Malta, Romania and Slovakia, followed by a balance of around +30 in Sweden and the Netherlands.

CHART 2-11
CHANGE IN WORKLOAD PREDICTIONS (BALANCE FIGURE).
ALL SURVEY COUNTRIES, 2008-16 SURVEYS
(workload predictions made in survey year for the following year)



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

CHART 2-12
WORKLOAD PREDICTIONS FOR 2017

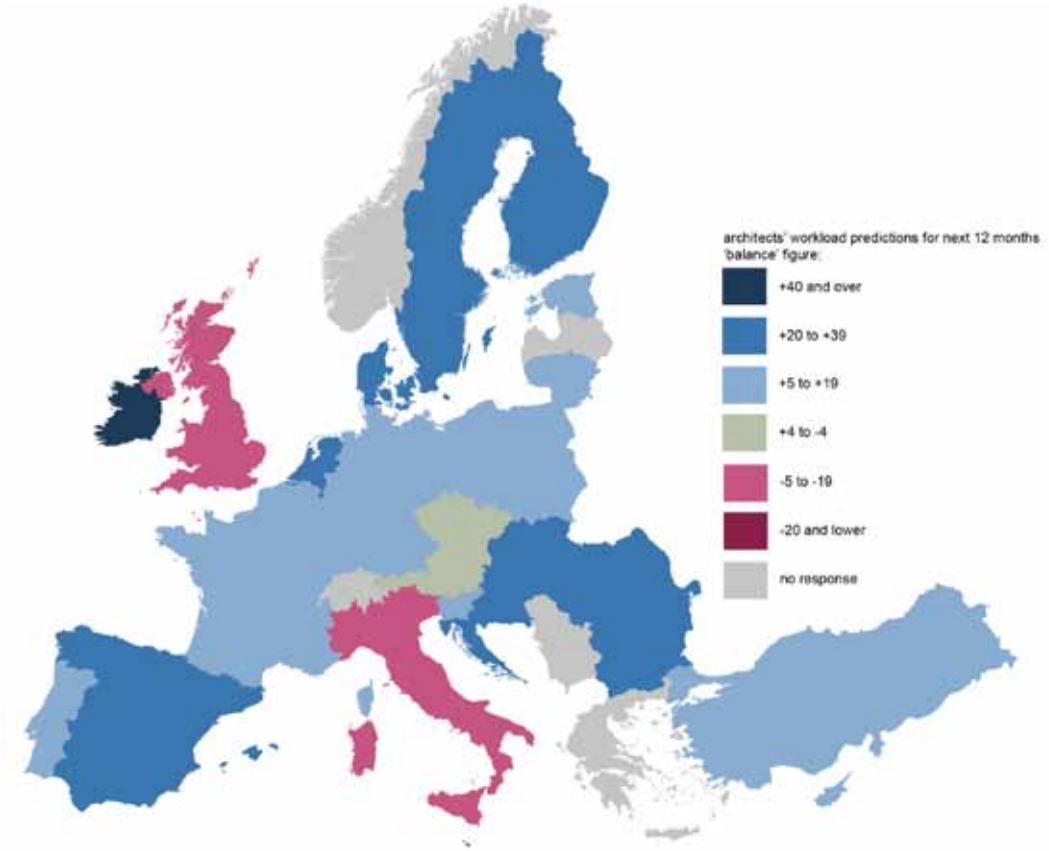


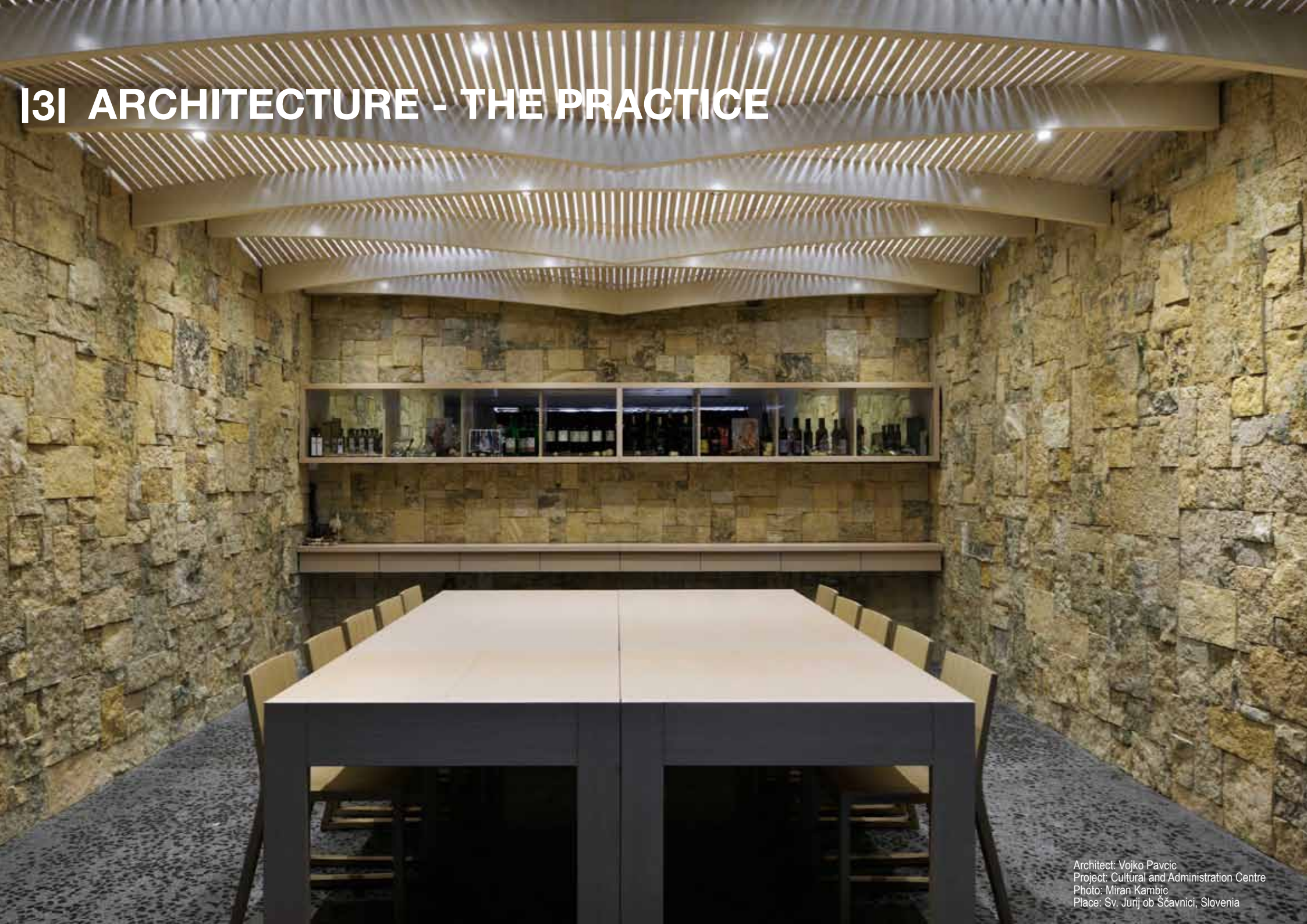
TABLE 2-10
FUTURE WORKLOAD PROSPECTS FOR 2017, ANALYSED BY COUNTRY

per cent	per cent of Principals who expect their practice workloads to change over the coming 12 months			balance**
	up	no change	down	
Austria	26	49	25	+1
Belgium	30	52	18	+12
Bulgaria	35	51	14	+22
Croatia	37	50	13	+23
Cyprus *	24	59	18	+6
Czech Republic *	19	63	19	0
Denmark	38	49	13	+24
Estonia *	35	39	26	+9
Finland	36	55	10	+26
France	34	43	23	+10
Germany	32	51	16	+16
Hungary	43	43	14	+29
Ireland	65	28	7	+59
Italy	20	46	33	-13
Lithuania	29	58	13	+16
Luxembourg	27	61	12	+16
Malta *	36	64	0	+36
Netherlands	41	48	11	+30
Poland	25	68	7	+18
Portugal	38	41	21	+16
Romania *	46	42	12	+35
Slovakia	42	51	7	+35
Slovenia	36	43	21	+14
Spain	39	46	15	+23
Sweden	42	48	10	+32
Turkey	41	32	27	+15
United Kingdom	27	41	32	-5
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
** The '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 2017, ANALYSED BY SIZE OF PRACTICE

|3| ARCHITECTURE - THE PRACTICE



Architect: Vojko Pavcic
Project: Cultural and Administration Centre
Photo: Miran Kambic
Place: Sv. Jurij ob Ščavnici, Slovenia

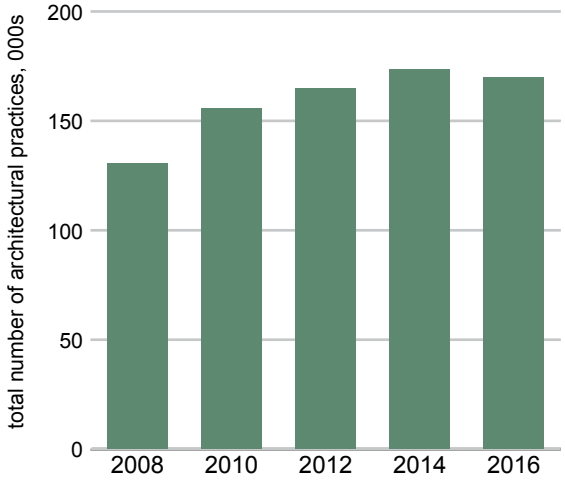
3.1 PROFILE OF ARCHITECTURAL PRACTICES

The number of private architectural practices in EUROPE-27 is estimated to be 158 300. This figure has been estimated by creating a model and then inserting data from the survey. The model is described in Appendix I. Grossing-up this figure to reflect all 32 European countries produces an estimate of 170 000 private architectural practices in Europe, a little lower than the 2014 estimate. Nearly three quarters of all architectural practices in Europe comprise one person. However, this year there appears to have been a change in the number of architects employed in large practices. More respondents in three countries in particular - Sweden, Denmark, Finland - are working in large practices than previously.

This has lead to a reduction in the number of one and two person practices in these countries. A small reduction in one and two person practices is evident across much of Europe, resulting in a net drop in the total number of practices between 2014 and 2016. The number of practices is higher in only two countries; Spain and Turkey.

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

CHART 3-1
CHANGE IN ESTIMATED NUMBER OF PRACTICES IN EUROPE-32, 2008-16



* Methodological Note: The base 'EUROPE-32' is different from the base used for previous surveys. Figures for 2008, 2010, 2012 and 2014 have been re-calculated using the 2016 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	1 076	394	265	79	16	1	0	1 832
Belgium	2 357	499	379	81	27	6	1	3 350
Bulgaria	424	157	232	30	10	2	0	856
Croatia	300	177	172	28	16	1	0	695
Cyprus *	180	36	59	17	2	0	0	295
Czech Republic *	857	776	187	70	22	0	0	1 912
Denmark	1 002	132	125	83	64	7	8	1 422
Estonia *	100	57	74	14	2	0	0	246
Finland	289	81	77	49	25	5	2	528
France	5 897	884	692	181	93	5	1	7 753
Germany	31 378	5 105	3 099	762	206	8	1	40 558
Hungary *	987	194	139	27	9	1	0	1 356
Ireland	450	158	100	24	19	2	1	754
Italy	47 009	4 957	3 192	445	106	7	3	55 720
Lithuania	190	68	50	23	6	0	0	337
Luxembourg	91	34	30	20	14	1	0	190
Malta *	45	15	25	8	6	1	0	99
Netherlands	1 980	961	568	130	38	7	9	3 692
Poland	2 790	503	527	245	59	12	4	4 138
Portugal	1 647	647	887	202	76	16	5	3 479
Romania *	683	293	423	237	24	5	1	1 666
Slovakia	250	114	65	17	4	0	0	449
Slovenia	198	117	107	17	3	1	0	444
Spain	5 651	1 159	1 034	184	34	11	5	8 077
Sweden	709	153	130	57	49	8	8	1 114
Turkey	3 450	2 772	2 937	815	312	32	22	10 341
United Kingdom	4 257	878	1 134	398	273	63	35	7 037
2016 EUR-27	114 247	21 319	16 706	4 243	1 516	202	108	158 342
per cent of practices	72	13	11	3	1	<1	<1	100
2014 EUR-26	*120 242*	*22 423*	*16 066*	*3 151*	*1 069*	*100*	*30*	*163 078*
2012 EUR-25	*98 193*	*28 134*	*22 663*	*5 247*	*1 305*	*151*	*35*	*155 725*
2010 EUR-23	*86 049*	*19 477*	*18 963*	*5 814*	*1 973*	*279*	*83*	*132 643*
2008 EUR-17	*37 369*	*13 489*	*10 868*	*5 318*	*2 014*	*449*	*344*	*69 851*

'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

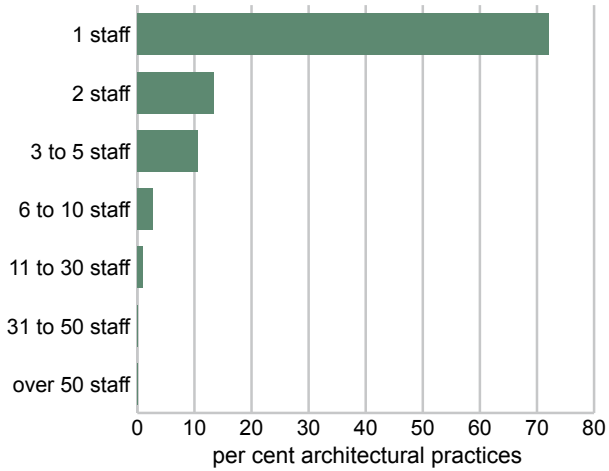
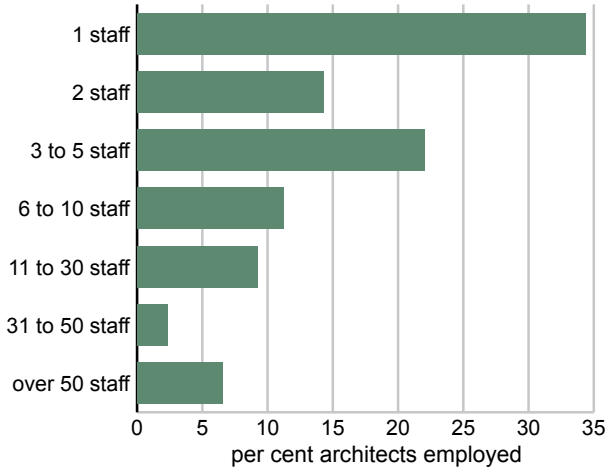


CHART 3-4
PROPORTION OF ARCHITECTS EMPLOYED IN PRACTICES OF DIFFERENT SIZES



3.2 LEGAL FORMATION OF PRACTICES

As in previous surveys, the majority of architects in Europe establish themselves as an 'independent architect'. But it is only just a majority, at 52 per cent, having fallen from 65 per cent in 2014. Whilst some of this fall may be due to architects leaving self-employment to join larger practices, it may also indicate a trend towards establishing architectural practices as limited companies. Compared with the 2014 survey, the proportion of Independent Architects has dropped markedly in France, Italy, Ireland, Spain and Turkey.

The proportion of practices which are established as limited companies is this year 36 per cent, higher than the 21 per cent in 2014 and 2012 and, indeed, a higher figure than recorded in any of the previous surveys. More than two thirds of practices are limited companies in Turkey, Croatia and Slovakia.

The highest proportion of partnerships is in the Netherlands and Denmark; while few architects establish themselves as PLCs or Economic Interest Groupings except in Finland, where 62 per cent of practices are PLCs.

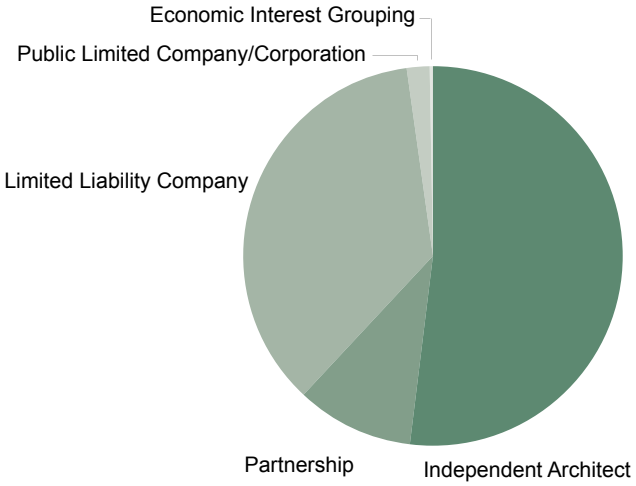
CHART 3-5
PROPORTION OF ARCHITECTURAL PRACTICES THAT ARE LIMITED COMPANIES / PLCS / CORPORATIONS

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	economic interest group
Austria	63	6	29	1	0
Belgium	52	6	41	1	0
Bulgaria	32	0	60	3	4
Croatia	17	3	70	7	2
Cyprus *	59	18	24	0	0
Czech Republic *	76	10	14	0	0
Denmark	44	32	15	9	0
Estonia *	39	26	32	3	0
Finland	31	4	2	62	1
France	68	2	25	5	1
Germany	73	19	8	0	0
Hungary *	n/a	n/a	n/a	n/a	n/a
Ireland	32	2	61	2	4
Italy	49	7	43	1	0
Lithuania	91	6	3	0	1
Luxembourg	63	10	22	4	0
Malta *	29	4	49	18	0
Netherlands	50	40	10	0	0
Poland	62	17	20	1	0
Portugal	52	28	21	0	0
Romania *	52	4	40	3	1
Slovakia	27	4	69	0	0
Slovenia	46	9	42	3	0
Spain	41	0	59	0	0
Sweden	62	9	22	1	7
Turkey	18	3	76	3	0
United Kingdom	45	6	43	6	0
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 REVENUE

Average practice revenue rises fairly evenly with practice size. A two person practice generates a little more than double the revenue of a one person practice; and a 6 to 10 sized practice records average revenue of a little more than twice that of a 3 to 5 person practice. Less data is available for the largest practice sizes due to small sample sizes in individual countries.

Compared with the previous survey, average practice revenue has increased in all size groups up to 30 staff. Some of the rises are large; average revenue is 18 per cent higher for 1 person practices, 34 per cent higher for two persons, 29 per cent higher for a practice with 3 to 5 staff, and 6 per cent higher for a 6 to 10 sized practice. The average practice revenue is just 1 per cent higher for the next size up, while averages for practices with over 30 staff are lower than in 2014 although the averages for larger practices are only indicative as the staff intervals are large and there can be a very wide variation in the revenues reported.

TABLE 3-3
AVERAGE REVENUE PER PRACTICE ANALYSED BY COUNTRY AND PRACTICE SIZE

€	average (mean) revenue: size of practice (number of architectural staff)						
	1	2	3 to 5	6 to 10	11 to 30	31 to 50	51+
Austria	64 931	122 690	259 625	696 923	1 556 944	n/a	22 724 000
Belgium	70 030	365 053	265 779	675 677	2 014 147	n/a	n/a
Bulgaria	7 169	39 276	79 550	n/a	n/a	n/a	n/a
Croatia	20 453	110 403	99 362	141 135	349 467	n/a	n/a
Cyprus *	n/a	n/a	n/a	150 000	n/a	n/a	n/a
Czech Republic *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Denmark	67 608	160 743	286 320	1 004 374	1 172 362	n/a	17 296 761
Estonia *	2 033	n/a	83 452	280 000	n/a	n/a	n/a
Finland	67 990	173 545	299 902	701 972	5 890 917	n/a	n/a
France	51 794	120 936	273 541	837 225	1 730 730	n/a	n/a
Germany	73 151	154 763	317 064	654 293	1 859 251	6 738 211	8 804 135
Hungary *	12 167	32 253	73 507	n/a	n/a	n/a	n/a
Ireland	45 718	121 967	220 213	503 143	1 161 262	n/a	n/a
Italy	24 082	49 171	74 765	164 400	490 301	n/a	6 125 429
Lithuania	12 978	26 566	20 500	178 349	n/a	n/a	n/a
Luxembourg	73 401	138 750	329 636	443 100	2 291 812	3 845 000	n/a
Malta *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	44 910	134 649	263 782	520 133	2 236 667	n/a	n/a
Poland	10 896	19 624	n/a	199 662	136 911	1 049 654	n/a
Portugal	16 596	46 334	100 451	207 800	500 000	n/a	n/a
Romania *	12 858	n/a	58 854	81 265	n/a	n/a	n/a
Slovakia	18 567	45 100	57 310	202 667	n/a	n/a	n/a
Slovenia	67 542	62 595	101 938	115 800	n/a	n/a	n/a
Spain	18 199	29 855	69 213	286 250	n/a	n/a	n/a
Sweden	89 271	204 343	331 595	908 062	1 744 453	3 333 135	20 507 536
Turkey	19 216	33 645	131 921	220 272	n/a	n/a	n/a
United Kingdom	48 104	110 601	264 201	657 411	1 473 206	7 668 339	5 342 045
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 2016, or the year 2015/16 or latest accounting year.
Figures are unadjusted for PPP.
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

Forty five per cent of architects' jobs are charged for based on a percentage of the contract value. Architects in France and Luxembourg are most likely to use this method; those in Finland and Sweden least likely.

One third of jobs, 34 per cent, are charged for on a lump sum basis - including at least half of jobs in Finland, Netherlands, Croatia and the Czech Republic.

An hourly charge is the method used on 14 per cent of jobs, including more than 40 per cent in Sweden and Finland.

Countries with the highest proportion of jobs for which no charge has been agreed include Bulgaria, Poland, Portugal, and Turkey.

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")
Austria	54	23	21	1
Belgium	56	24	18	1
Bulgaria	35	38	13	14
Croatia	27	51	14	9
Cyprus *	46	36	10	9
Czech Republic *	32	53	14	1
Denmark	32	31	34	4
Estonia *	30	38	30	3
Finland	7	51	41	1
France	67	25	7	1
Germany	60	16	20	4
Hungary *	55	26	10	10
Ireland	35	49	14	3
Italy	39	44	7	9
Lithuania	45	35	14	6
Luxembourg	74	13	11	2
Malta *	32	31	33	4
Netherlands	18	50	29	3
Poland	26	29	33	13
Portugal	39	40	9	11
Romania *	54	26	10	9
Slovakia	50	28	17	5
Slovenia	39	32	23	7
Spain	56	30	6	8
Sweden	7	33	57	3
Turkey	40	42	6	12
United Kingdom	28	44	26	2
2016 EUROPE-27	45	34	14	7
2014 EUROPE-26	*47*	*32*	*14*	*7*
2012 EUROPE-25	*43*	*36*	*12*	*9*
2010 EUROPE-23	*49*	*29*	*18*	*5*
2008 EUROPE-17	*56*	*23*	*16*	*6*

* 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 (table 3-5) are generally highest in Luxembourg, Austria, Sweden and the Netherlands. Lowest hourly rates are recorded in Romania, Turkey and Poland.

Average rates have increased since the 2014 survey; rates for Principals are now €70 per hour, 9 per cent higher than in 2014; average rates for architects are 8 per cent higher while for technologists the average is 2 per cent higher than in 2014. Average PPP hourly rates this year are higher than in any of the years this survey has been running.

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	architects	technologists
Austria	90	79	62
Belgium	67	57	45
Bulgaria	55	44	22
Croatia	n/a	n/a	n/a
Cyprus *	57	29	20
Czech Republic *	23	15	9
Denmark	83	75	59
Estonia *	40	27	7
Finland	71	58	48
France	76	71	57
Germany	75	65	48
Hungary *	50	39	22
Ireland	73	61	45
Italy	40	30	25
Lithuania	n/a	n/a	n/a
Luxembourg	94	72	50
Malta *	93	50	30
Netherlands	82	78	60
Poland	29	n/a	12
Portugal	37	28	25
Romania *	10	17	4
Slovakia	30	23	15
Slovenia	43	31	19
Spain	33	28	22
Sweden	85	76	67
Turkey	26	13	8
United Kingdom	73	63	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

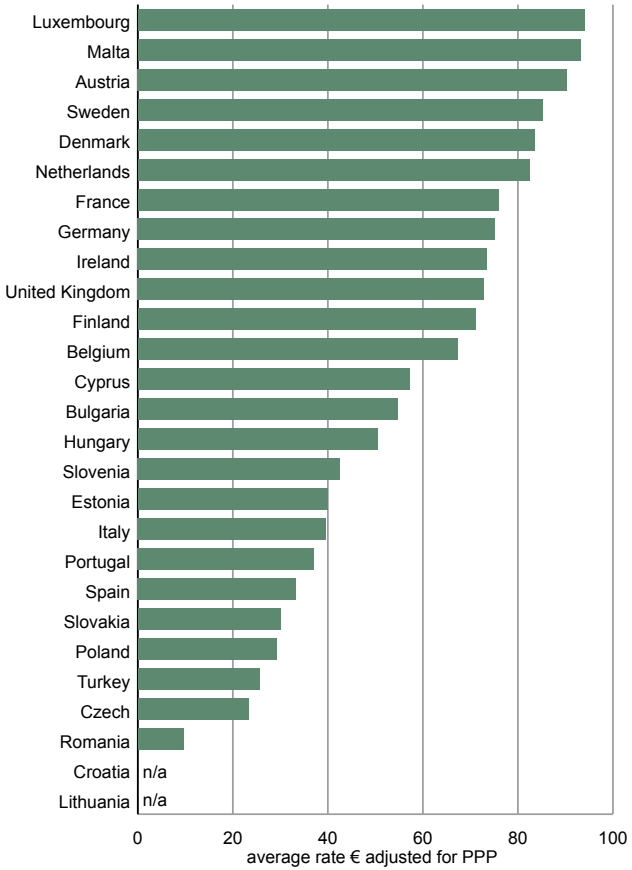
Data is expressed in Euros but each country's figure has been adjusted using an index of Purchasing Power Parity (PPP). This index takes account of price level differences across countries. We have used an index sourced from Eurostat, whose Comparative Price Level Indices assess the price level of each 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	architects	technologists
Austria	96	84	65
Belgium	74	62	48
Bulgaria	26	20	10
Croatia	n/a	n/a	n/a
Cyprus *	50	25	18
Czech Republic *	15	9	6
Denmark	114	104	81
Estonia *	30	20	5
Finland	85	70	58
France	80	80	60
Germany	75	65	48
Hungary *	26	22	13
Ireland	90	75	55
Italy	40	30	25
Lithuania	n/a	n/a	n/a
Luxembourg	112	86	60
Malta *	75	40	24
Netherlands	90	85	65
Poland	16	n/a	7
Portugal	30	25	20
Romania *	5	9	2
Slovakia	20	15	10
Slovenia	34	25	15
Spain	30	25	20
Sweden	103	92	82
Turkey	16	8	5
United Kingdom	96	83	64
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

Profits are expressed here as a percentage of revenue. Practice profits fall as practice size increases, so in a practice with one person, average profits are 53 per cent of revenue. This falls to 35 per cent in a 3 to 5 person practice, to 21 per cent in an 11 to 30 person practice, and 16 per cent in practices with more than 50 staff.

This pattern is entirely consistent with that recorded in previous years. Compared with the last survey, average practice profits as a percentage of revenue have fallen in all practice sizes, and are now very similar to those recorded in 2012. 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

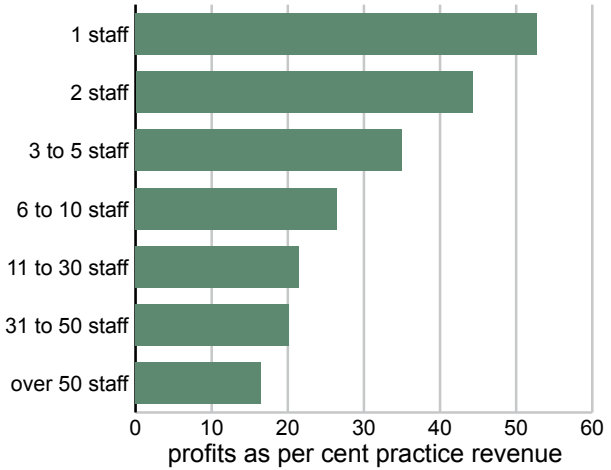


TABLE 3-7
AVERAGE PRE-TAX PROFITS AS A PERCENTAGE OF TOTAL REVENUE, ANALYSED BY COUNTRY AND PRACTICE SIZE

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	46	43	35	22	19	n/a	n/a
Belgium	40	24	20	13	14	n/a	n/a
Bulgaria	76	54	43	n/a	24	n/a	n/a
Croatia	28	21	13	76	7	n/a	n/a
Cyprus *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Czech Republic *	65	43	n/a	n/a	n/a	n/a	n/a
Denmark	60	56	13	11	18	4	8
Estonia *	n/a	n/a	3	18	10	n/a	n/a
Finland	56	28	20	13	9	n/a	n/a
France	43	31	14	11	7	9	n/a
Germany	60	52	40	31	27	20	13
Hungary *	47	22	27	17	22	n/a	n/a
Ireland	46	23	17	7	12	n/a	11
Italy	50	41	38	21	31	n/a	22
Lithuania	49	43	39	29	n/a	n/a	n/a
Luxembourg	18	32	15	12	-1**	7	n/a
Malta *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	52	35	28	20	2	n/a	n/a
Poland	44	50	n/a	n/a	n/a	76	n/a
Portugal	45	5	16	21	n/a	n/a	n/a
Romania *	40	n/a	15	12	n/a	n/a	n/a
Slovakia	46	41	43	11	n/a	n/a	n/a
Slovenia	24	25	21	42	n/a	n/a	n/a
Spain	43	31	32	37	n/a	n/a	n/a
Sweden	34	18	18	15	10	8	8
Turkey	51	32	39	34	n/a	n/a	n/a
United Kingdom	54	66	41	23	19	n/a	28
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 ** Negative figures indicate losses. Luxembourg size 11 to 30 staff, This figure is based on sample size = 14.

3.7 REVENUE FROM OUTSIDE OWN COUNTRY

Some 4 per cent of practice revenue is generated from work undertaken outside the country in which the architectural practice is based. The highest proportion is generated by architects in Portugal, Bulgaria and Turkey (17 per cent or more). The overall figure of 4 per cent is lower than that recorded in any of the previous four surveys.

About 63 per cent of revenue from outside the practice's own country comes from work in another European country. This is similar to the 2014 result. The highest proportion of total practice revenue derived from outside Europe is recorded by architects in Bulgaria, Turkey, Portugal and Cyprus - over 10 per cent of total practice revenue in these countries comes from work outside Europe.

CHART 3-9
SOURCE OF REVENUE

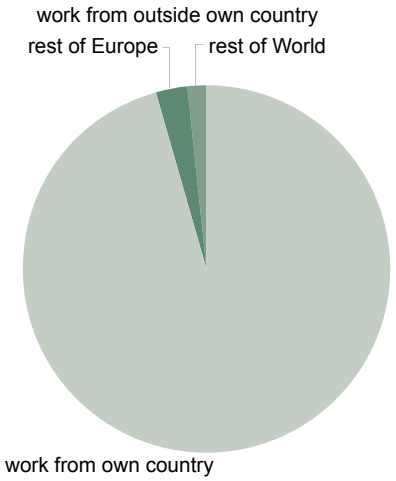


TABLE 3-8
PROPORTION OF PRACTICE REVENUE DERIVED FROM OUTSIDE THE COUNTRY, ANALYSED BY COUNTRY

per cent	revenue derived from outside the country		
	revenue from rest of Europe	revenue from outside Europe	TOTAL
Austria	6.8	2.4	9.2
Belgium	4.1	0.8	4.9
Bulgaria	4.5	13.5	18.0
Croatia	5.5	5.3	10.8
Cyprus *	2.4	11.4	13.8
Czech Republic *	8.7	1.0	9.7
Denmark	10.1	4.9	15.0
Estonia *	5.2	0.0	5.2
Finland	3.3	1.3	4.6
France	3.4	1.7	5.1
Germany	1.2	0.6	1.8
Hungary *	13.3	1.0	14.4
Ireland	7.3	3.1	10.4
Italy	2.6	1.6	4.3
Lithuania	7.0	7.0	14.0
Luxembourg	13.7	2.3	16.0
Malta *	0.0	0.0	0.0
Netherlands	7.1	3.7	10.8
Poland	7.4	0.1	7.5
Portugal	7.0	11.5	18.6
Romania *	9.5	4.8	14.3
Slovakia	9.0	0.3	9.4
Slovenia	5.6	1.7	7.3
Spain	1.3	2.1	3.4
Sweden	2.2	1.7	4.0
Turkey	4.1	12.5	16.6
United Kingdom	7.0	4.2	11.3
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

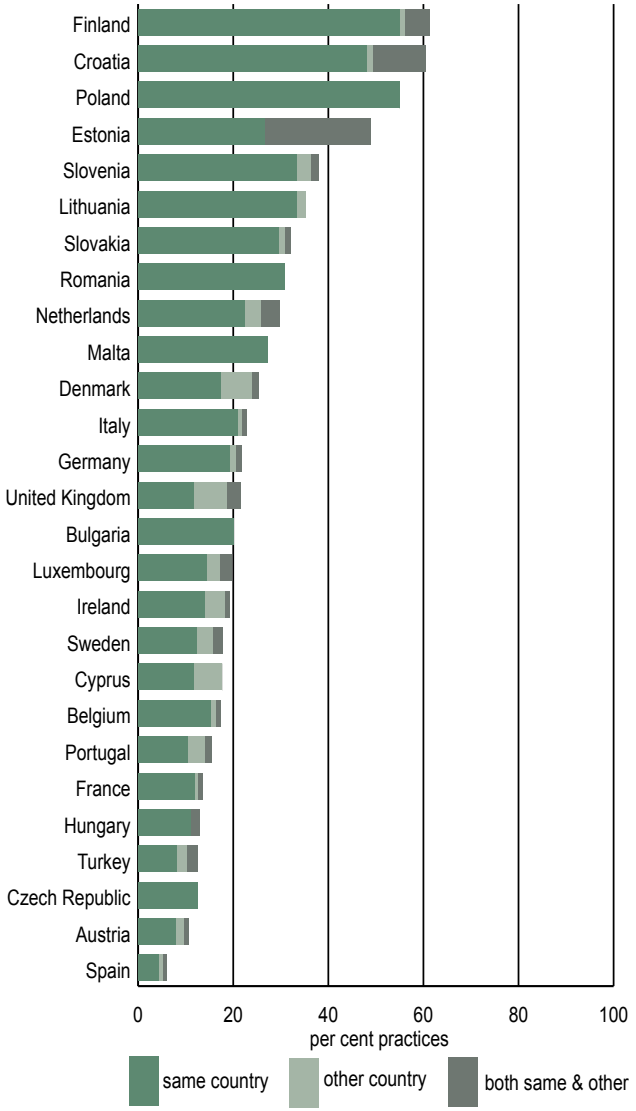
3.8 ASSOCIATIONS

TABLE 3-9
PROPORTION OF PRACTICES WHO HAVE 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	89	8	2	1
Belgium	83	15	1	1
Bulgaria	80	20	0	0
Croatia	40	48	1	11
Cyprus *	82	12	6	0
Czech Republic *	88	13	0	0
Denmark	75	17	7	1
Estonia *	51	27	0	22
Finland	39	55	1	5
France	86	12	1	1
Germany	78	19	1	1
Hungary*	87	11	0	2
Ireland	81	14	4	1
Italy	77	21	1	1
Lithuania	65	33	2	0
Luxembourg	80	14	3	3
Malta *	73	27	0	0
Netherlands*	70	22	4	4
Poland	45	55	0	0
Portugal	85	10	4	1
Romania *	69	31	0	0
Slovakia	68	29	1	1
Slovenia	62	33	3	2
Spain	94	4	1	1
Sweden	82	12	3	2
Turkey	87	8	2	2
United Kingdom	78	12	7	3
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 WHO HAVE A FORMAL ASSOCIATION WITH ANOTHER PRACTICE



3.8 ASSOCIATIONS

Twenty per cent of architects have an association with another practice. For most of these, it is an association with another practice in the same country. Just 3 per cent of architects have an association with another practice in a different country.

More architects in Finland, Croatia, Poland and Estonia have an association with another practice, either in the same country or elsewhere. Twenty two per cent of architects in Estonia have an association with a practice in another country, the highest figure reported.

3.9 BRANCH OFFICES

Working in a branch or subsidiary office provides information as to how many offices an architectural practice might have. Overall, few architects (6 per cent) work in a branch office. This proportion is highest - more than 15 per cent - in Turkey, Denmark and the United Kingdom. Lowest proportions are recorded by architects in Germany, Cyprus, Slovenia and Spain. For those architects who work in a branch office, the head office is nearly always located in the same country as the branch office and the same country as where the architect is established (95 per cent for both).

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	3	92	97
Belgium	4	97	99
Bulgaria	4	95	91
Croatia	6	93	96
Cyprus *	0	100	67
Czech Republic *	7	84	100
Denmark	18	86	90
Estonia *	4	87	90
Finland	7	62	75
France	3	97	94
Germany	1	77	77
Hungary *	5	89	96
Ireland	9	83	86
Italy	4	98	98
Lithuania	9	90	90
Luxembourg	4	83	82
Malta *	8	86	100
Netherlands	11	98	87
Poland	7	98	98
Portugal	10	81	84
Romania *	11	100	100
Slovakia	11	82	77
Slovenia	3	89	89
Spain	3	70	65
Sweden	13	91	100
Turkey	18	90	91
United Kingdom	16	87	86
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 ARCHITECTURAL DESIGN COMPETITIONS

In a new question for this year's survey, 20 per cent of Principals said that their practice had entered one or more Architectural Design Competitions in the 12 months to May 2016. About three quarters of these competitions were for public sector jobs, and one quarter for private sector work. Slightly more architects (36 per cent) entered open competitions than competitions with a pre-selection procedure (28 per cent) or an invited competition (24 per cent).

These respondents said they had been successful in 36 per cent of Architectural Design Competitions. The success rate is 48 per cent for private sector Competitions, and 31 per cent for public sector. The highest success rates are recorded for invited competitions, at 51 per cent. Architectural Design Competitions with a pre-selection procedure resulted in a success rate of 31 per cent, while success at an open competition was 27 per cent. In all cases, architects gained higher success rates for private sector Architectural Design Competitions than for public sector ones.

Responding architects said their practice spent an average €12,600 participating in Architectural Design Competitions during the past 12 months. The resulting fee revenue from successful competitions far exceeded this investment; an average of €114 000 per practice - nine times this investment. These averages are for all practices who entered at least one Architectural Design Competition - regardless of whether or not they were successful.

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

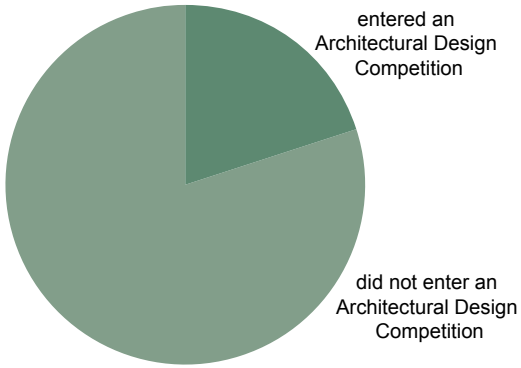


CHART 3-12
ARCHITECTURAL DESIGN COMPETITIONS ENTERED LAST 12 MONTHS - SUCCESS RATES

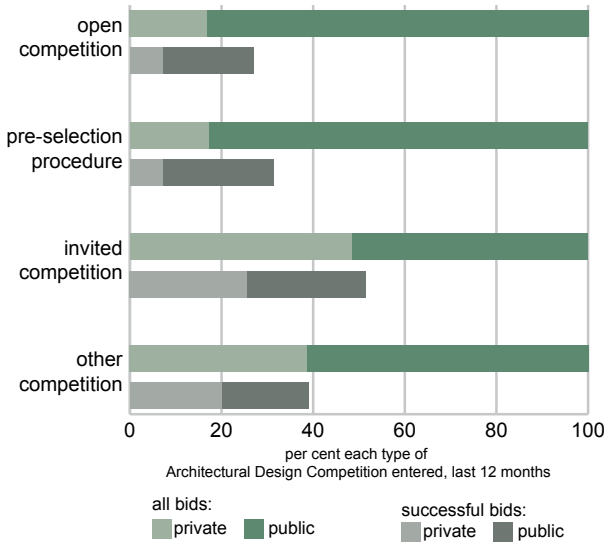


CHART 3-13
ARCHITECTURAL DESIGN COMPETITIONS ENTERED - TYPE OF COMPETITION

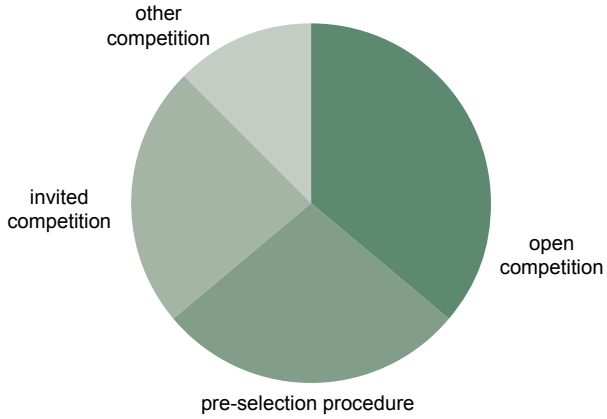


TABLE 3-11
ARCHITECTURAL DESIGN COMPETITION PARTICIPATION RATES

per cent	practices participating in Architectural Design Competitions last 12 months
Austria	51
Belgium	30
Bulgaria	17
Croatia	11
Cyprus *	15
Czech Republic *	14
Denmark	24
Estonia *	53
Finland	36
France	36
Germany	19
Hungary *	7
Ireland	30
Italy	17
Lithuania	12
Luxembourg	39
Malta *	9
Netherlands	22
Poland	61
Portugal	21
Romania *	27
Slovakia	32
Slovenia	29
Spain	30
Sweden	12
Turkey	14
United Kingdom	24
2016 EUROPE-27	20
2014 EUROPE-26	*n/a*
2012 EUROPE-25	*n/a*
2010 EUROPE-23	*n/a*
2008 EUROPE-17	*n/a*

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	30	20	31	19	100	74	26
Belgium	47	32	16	5	100	80	20
Bulgaria	66	8	25	1	100	69	31
Croatia	22	1	50	27	100	62	38
Cyprus *	26	28	31	15	100	62	38
Czech Republic *	51	12	37	0	100	100	0
Denmark	3	73	17	7	100	81	19
Estonia *	80	1	16	2	100	80	20
Finland	31	38	23	8	100	64	36
France	32	50	9	9	100	86	14
Germany	24	31	33	12	100	74	26
Hungary *	9	3	88	0	100	95	5
Ireland	29	13	34	24	100	33	67
Italy	53	18	13	16	100	79	21
Lithuania	59	9	12	21	100	59	41
Luxembourg	37	33	15	14	100	63	37
Malta *	100	0	0	0	100	100	0
Netherlands	22	40	34	4	100	61	39
Poland	46	10	39	5	100	50	50
Portugal	40	11	45	4	100	42	58
Romania *	13	13	48	26	100	77	23
Slovakia	40	11	33	17	100	51	49
Slovenia	27	6	62	5	100	71	29
Spain	40	17	29	14	100	58	42
Sweden	15	27	35	24	100	53	47
Turkey	60	12	18	11	100	77	23
United Kingdom	16	39	41	5	100	36	64
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

2008/10/12 question was not asked in previous surveys. Some data is available for 2014 although question asked was worded differently.

TABLE 3-13
ARCHITECTURAL DESIGN COMPETITION SUCCESS RATES

per cent	Architectural Design Competitions entered last 12 months	
	success rate - public	success rate - private
Austria	25	40
Belgium	38	39
Bulgaria	83	36
Croatia	64	74
Cyprus *	48	62
Czech Republic *	56	n/a
Denmark	37	14
Estonia *	62	80
Finland	37	71
France	21	45
Germany	35	48
Hungary *	88	50
Ireland	27	71
Italy	25	41
Lithuania	42	42
Luxembourg	30	59
Malta *	0	n/a
Netherlands	45	61
Poland	30	38
Portugal	41	58
Romania *	88	60
Slovakia	33	29
Slovenia	43	61
Spain	24	61
Sweden	41	54
Turkey	24	67
United Kingdom	44	47
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 revenue 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	695	32 067	70 321	12.3	23	11 568
Belgium	686	29 676	144 895	8.5	8	8 684
Bulgaria	184	2 887	13 109	0.7	5	6 514
Croatia	162	2 095	1 907	0.9	36	12 837
Cyprus *	760	5 091	17 500	1.7	10	2 500
Czech Republic *	n/a	n/a	2 772	n/a	n/a	n/a
Denmark	904	90 799	198 040	27.4	15	23 678
Estonia *	507	10 347	43 379	3.7	44	17 759
Finland	388	39 620	65 775	106.4	22	21 833
France	372	20 647	193 691	7.6	12	40 295
Germany	705	33 721	198 801	13.0	61	21 998
Hungary *	101	5 318	34 061	9.6	19	7 432
Ireland	111	6 550	98 300	7.0	1	2 500
Italy	93	1 224	11 821	1.3	7	4 347
Lithuania	143	2 055	14 589	0.7	31	1 778
Luxembourg	551	29 224	464 677	242.0	27	12 556
Malta *	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	169	10 572	44 314	7.7	12	14 319
Poland	544	4 209	4 798	7.2	41	3 195
Portugal	449	12 069	33 635	7.4	20	23 517
Romania *	n/a	n/a	n/a	n/a	n/a	n/a
Slovakia	254	3 109	12 687	14.7	12	5 231
Slovenia	222	2 959	1 833	8.2	20	4 880
Spain	118	1 467	11 230	6.5	6	25 281
Sweden	946	68 585	407 844	60.0	9	78 388
Turkey	197	1 492	3 210	1.3	11	12 927
United Kingdom	98	7 182	144 508	28.7	1	185
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

2008/10/12/14 question was not asked in previous surveys.

3.11 CERTIFICATION WORK

TABLE 3-15
ARCHITECTURAL PRACTICES WHO OFFER CERTIFICATION SERVICES, ANALYSED BY COUNTRY

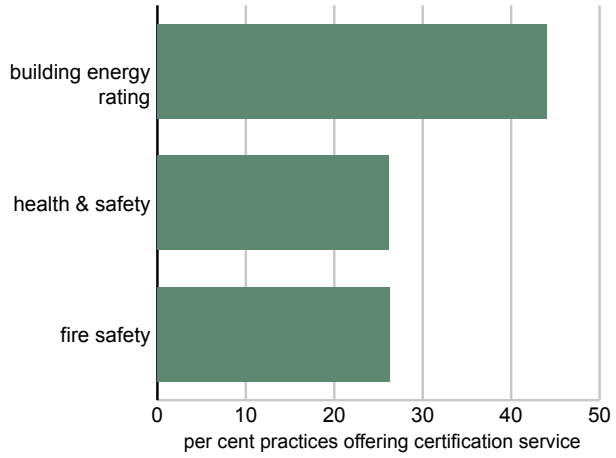
per cent of practices who offer service	type of certification offered		
	building energy rating	health & safety	fire safety
Austria	29	6	13
Belgium	25	13	10
Bulgaria	29	25	35
Croatia	35	9	13
Cyprus *	59	43	25
Czech Republic *	10	0	19
Denmark	22	15	17
Estonia *	31	44	45
Finland	10	13	9
France	14	11	14
Germany	n/a	n/a	n/a
Hungary	41	16	27
Ireland	11	47	46
Italy	58	32	24
Lithuania	14	12	15
Luxembourg	57	3	8
Malta *	36	11	0
Netherlands	27	14	17
Poland	51	17	24
Portugal	10	14	36
Romania *	35	29	54
Slovakia	33	15	27
Slovenia	14	2	7
Spain	93	56	63
Sweden	13	20	10
Turkey	38	25	25
United Kingdom	8	7	4
2016 EUROPE-27	44	26	26
2014 EUROPE-26	*42*	*24*	*35*
2012 EUROPE-25	*n/a*	*n/a*	*n/a*
2010 EUROPE-23	*n/a*	*n/a*	*n/a*
2008 EUROPE-17	*n/a*	*n/a*	*n/a*

* caution - small sample

A substantial proportion of practices, 44 per cent, offer building energy rating certification. About a quarter, 26 per cent, offer health & safety or fire safety certifications. Nearly all architects in Spain offer building energy rating certification; other countries where high proportions are recorded include Cyprus, Italy and Poland. The highest offering of health & safety certification is by architects in Spain, Ireland, Estonia and Cyprus; while more architects in Spain, again, than elsewhere offer fire safety certification.

Compared with the 2014 survey, slightly more architects offer building energy rating certification and health & safety certification now than in the previous survey, but fewer offer fire safety certification.

CHART 3-14
CERTIFICATION SERVICES OFFERED



|4| ARCHITECTS - THE INDIVIDUAL

Architect: Dekleva Gregoric Architects
Project: Compact Karst House
Photo: James Maroti
Place: Vrhovlje, Slovenia

4.1 EARNINGS

Average architects' earnings are €32 068 (adjusted for PPP). This is 10 per cent higher than the 2014 survey figure, and is the first year in which average earnings have increased since this survey began, in 2008.

Average salaries are higher in most countries; the largest rises between 2014 and 2016 are recorded in Romania, the Czech Republic, Slovenia and Luxembourg. Average salaries are lower in a handful of countries, with the largest falls recorded by architects in Bulgaria, the Netherlands and Spain.

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.

CHART 4-1
CHANGE IN ARCHITECTS' AVERAGE EARNINGS (ALL SURVEY COUNTRIES), 2008-16

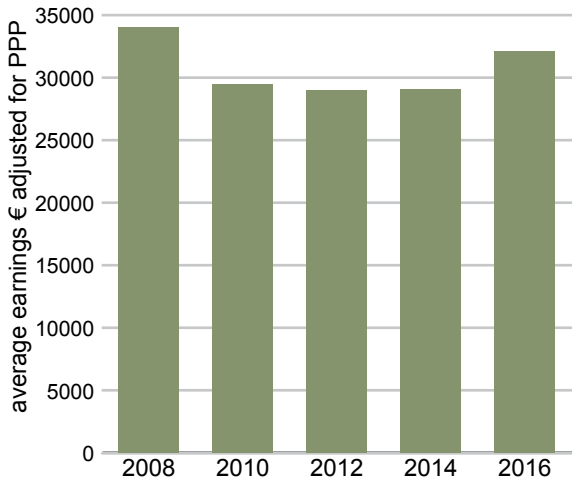


CHART 4-2
RANGE OF AVERAGE EARNINGS (ALL FULL-TIME ARCHITECTS), ADJUSTED FOR PPP

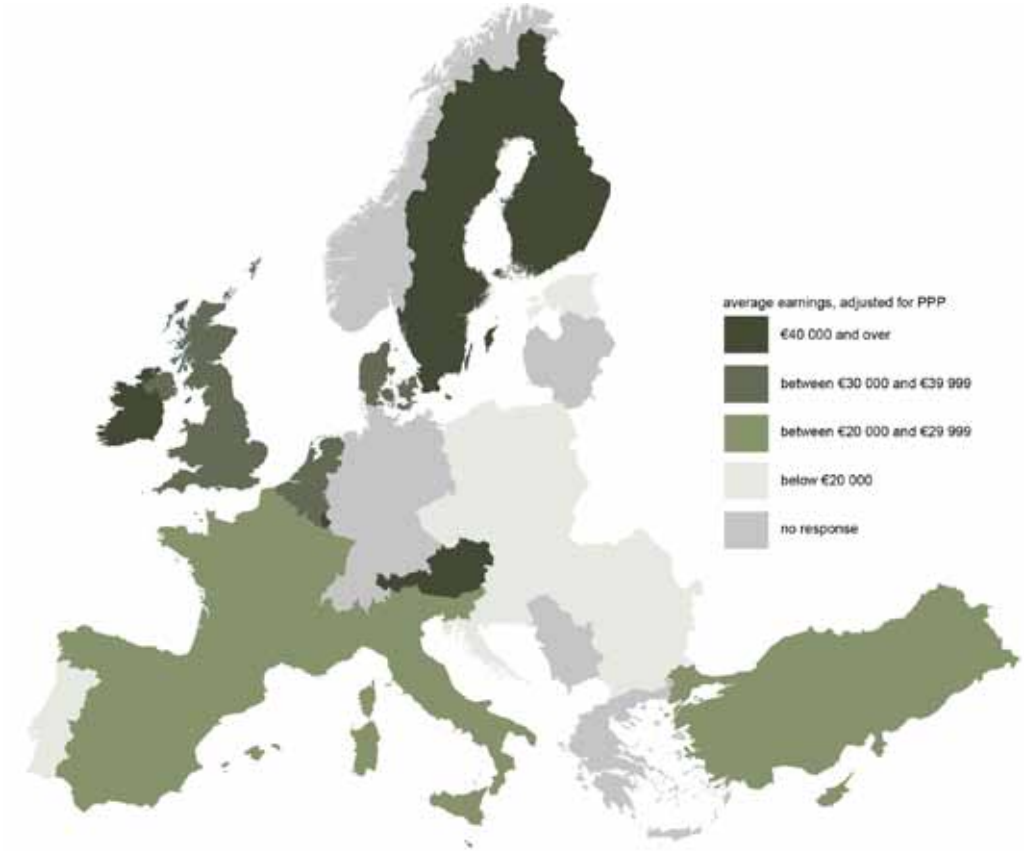
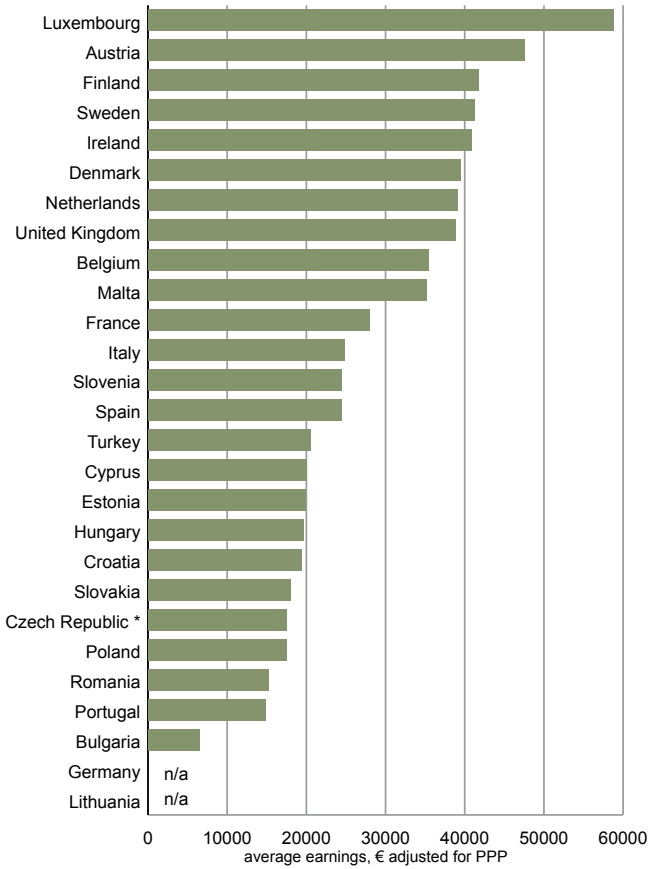


TABLE 4-1
AVERAGE EARNINGS OF FULL-TIME ARCHITECTS ANALYSED BY COUNTRY

€	average (median) earnings 2016		*average (median) earnings adjusted for PPP*			
	adjusted for PPP	unadjusted for PPP	*2014*	*2012*	*2010*	*2008*
Austria	47 529	50 000	*42 095*	*42 174*	*38 925*	*47 337*
Belgium	35 481	38 000	*30 192*	*28 354*	*28 384*	*28 222*
Bulgaria	6 564	3 576	*9 506*	*12 030*	*14 555*	*n/a*
Croatia	19 338	12 481	*17 946*	*18 078*	*18 892*	*n/a*
Cyprus *	20 023	17 000	*n/a*	*n/a*	*n/a*	*n/a*
Czech Republic *	17 518	11 089	*13 150*	*19 410*	*21 268*	*n/a*
Denmark	39 478	53 738	*43 187*	42 543	*37 843*	*39 012*
Estonia *	19 947	14 000	*22 215*	*12 776*	*15 318*	*36 084*
Finland	41 771	50 000	*40 486*	*38 339*	*35 601*	*32 327*
France	27 986	30 000	*27 498*	*27 326*	*28 871*	*33 241*
Germany ***	n/a ***	n/a ***	*43 350*	*46 422*	*39 932*	*38 797*
Hungary	19 609	11 216	*n/a*	13,678	*n/a*	*n/a*
Ireland	40 816	49 250	*38 103*	*36 847*	*40 200*	*52 209*
Italy	24 777	25 000	*27 132*	*24 248*	*18 779*	*n/a*
Lithuania	n/a	n/a	*n/a*	*n/a*	*10,252*	*n/a*
Luxembourg	58 725	70 000	*48 701*	*46 267*	*n/a*	*44 484*
Malta *	35 122	28 273	*36 478*	*32 051*	*n/a*	*34 447*
Netherlands	39 047	43 000	*54 496*	*n/a*	*n/a*	*n/a*
Poland	17 489	9 584	*n/a*	*22,045*	*24,935*	*n/a*
Portugal	14 833	12 000	*13 433*	*13 714*	*n/a*	*n/a*
Romania *	15 274	8 039	*9 822*	*10 844*	*8 172*	*22 748*
Slovakia	18 018	12 000	*15 581*	*n/a*	*16,378*	*n/a*
Slovenia	24 406	19 000	*19 808*	*17 964*	*29 240*	*31 491*
Spain	24 390	22 000	*28 354*	*20 534*	*n/a*	*n/a*
Sweden	41 216	49 777	*35 890*	*35 649*	*36 612*	*29 990*
Turkey	20 517	13 120	*19 213*	*24 902*	*21 432*	*20 486*
United Kingdom	38 871	51 037	*37 582*	*48 242*	*45 922*	*45 014*
2016 EUROPE-27** (26 in 2014 25 in 2012 23 in 2010 and 17 in 2008)	32 068	32 000	*29 070*	*29 014*	*29 493*	*34 003*

* caution - small sample
** 2016 EUROPE-27 figures are NOT WEIGHTED so will be affected by the composition of each year's sample. The EUROPE-27 total for 2016 includes the Germany 2016 figures for Partners/Directors/Sole Principals plus an estimate, based on 2014 Germany data, for employment fields not included in the 2016 survey.
*** 2016 earnings for Germany n/a because the German data is sourced from BAK survey which only includes Partners/Directors/ Sole Principals

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

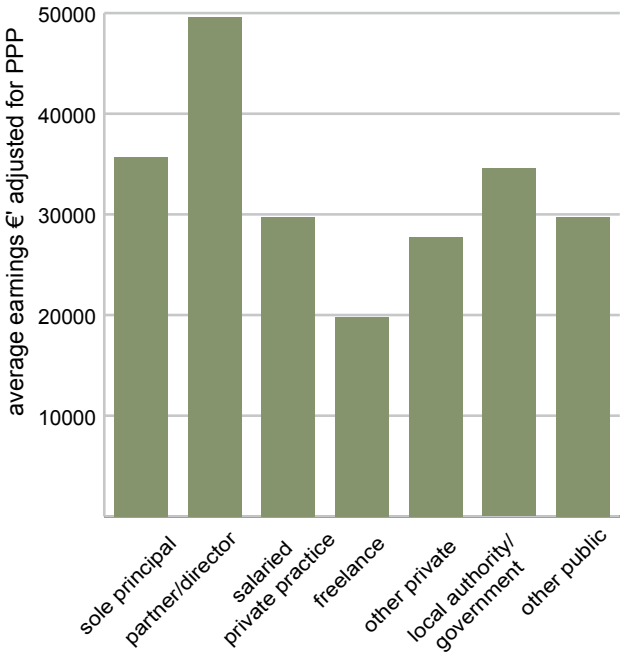


4.2 EARNINGS BY FIELD OF EMPLOYMENT

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

€	average (median) earnings adjusted for PPP									
	sole principal	partner/ director	ALL Prin-cipals	private practice salaried	freelance	other private	ALL private	local / central gov't	other public	ALL public
Austria	47 529	56 559	47 529	35 789	n/a	n/a	47 529	n/a	n/a	n/a
Belgium	37 348	44 818	42 017	46 685	30 187	32 680	37 348	38 282	44 282	38 282
Bulgaria	10 119	n/a	13 127	4 159	17 503	n/a	6 564	9 189	n/a	6 564
Croatia	15 890	15 267	15 291	19 391	n/a	23 003	18 321	19 949	27 033	26 463
Cyprus *	17 162	n/a	20 384	1 912	n/a	n/a	15 775	n/a	n/a	n/a
Czech Republic *	17 518	n/a	17 518	19 796	10 511	n/a	17 518	n/a	n/a	n/a
Denmark	37 318	60 298	49 102	37 760	12 422	39 310	40 636	38 594	40 755	39 773
Estonia *	n/a	42 553	42 553	19 947	n/a	n/a	19 947	n/a	n/a	n/a
Finland	45 530	61 821	50 961	38 012	n/a	46 700	41 249	41 896	44 110	42 356
France	23 719	35 579	23 719	37 951	22 770	24 668	28 463	37 713	32 875	34 837
Germany **	56 052	65 264	58 347	n/a	39 090	n/a	n/a	n/a	n/a	n/a
Hungary	22 410	n/a	28 013	19 049	n/a	16 808	18 769	20 169	16 808	19 609
Ireland	33 469	47 347	37 551	36 646	n/a	42 449	36 735	56 327	46 122	53 061
Italy	27 209	34 688	28 962	23 786	17 839	21 804	24 777	29 732	26 759	27 405
Lithuania	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg	43 666	73 826	63 758	76 133	50 336	67 114	67 114	n/a	n/a	n/a
Malta *	n/a	n/a	n/a	26 460	n/a	n/a	32 298	35 963	47 826	36 646
Netherlands	45 830	48 121	45 830	45 830	27 077	36 664	39 413	n/a	57 287	59 578
Poland	22 902	73 078	35 394	8 045	7 995	2 078	18 321	20 216	n/a	20 216
Portugal	16 341	17 800	17 305	11 867	13 597	16 378	13 943	19 468	25 884	22 250
Romania *	17 640	23 121	20 381	2 906	n/a	n/a	15 489	n/a	n/a	n/a
Slovakia	22 072	16 216	19 219	19 520	13 101	n/a	20 420	n/a	n/a	16 937
Slovenia	25 031	25 031	25 031	18 773	18 773	17 522	22 528	n/a	n/a	27 034
Spain	16 630	27 716	17 738	26 608	23 282	22 173	22 173	57 650	45 455	53 215
Sweden	43 904	62 720	52 326	40 320	n/a	38 707	41 037	41 485	46 448	41 996
Turkey	46 164	30 776	41 034	16 003	21 004	9 233	18 465	24 621	22 928	23 082
United Kingdom	25 752	48 588	38 871	38 871	n/a	35 955	38 871	38 540	57 143	46 645
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
EARNINGS BY FIELD OF EMPLOYMENT
(ADJUSTED FOR PPP)



* caution - small sample
** Germany data from BAK survey which includes data for Partners/Directors/Sole Principals only. Some cells are therefore marked n/a. Germany IS included in the 2016 EUROPE-27 figure (includes 2016 data for Partners/Directors/ Sole Principals plus an estimate, based on 2014 Germany data, for employment fields not included in the 2016 survey).
Earnings data converted from local currencies to Euros, exchange rate as at 01.05.16 and then adjusted for PPP

This year, Partners and Directors earn 39 per cent more than the next highest paid employment group, Sole Principals. Average earnings for both groups have increased markedly since 2014; Sole Principals' average earnings are 23 per cent higher; while that for Partners and Directors is up by 28 per cent.

Average salaries of private practice salaried staff are 4 per cent higher while freelancers' earnings are higher by 2 per cent. But average salaries for architects working in 'other' private areas are lower in 2016 than in the 2014 survey.

Average salaries of local or central government architects have increased by 11 per cent, but those in other parts of the public sector report a fall in salaries, which are 5 per cent lower.

Architects' average earnings rise in line with age. The increases between each five year age group are fairly even up to age 50. Peak earnings are achieved at age 55 to 64.

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

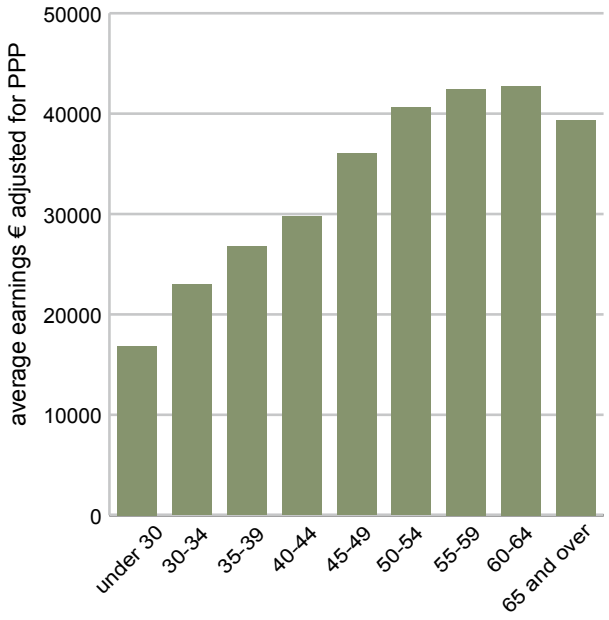
4.3 EARNINGS BY AGE

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

€	2016*			*2014 EUROPE-26 MEDIAN*	*2012 EUROPE-25 MEDIAN*	*2010 EUROPE-23 MEDIAN*	*2008 EUROPE-17 MEDIAN*
	lower quartile	MEDIAN	upper quartile				
<30	7 136	16 848	27 197	*14 241*	*14 549*	*15 615*	*17 041*
30-34	12 099	22 995	34 012	*14 763*	*19 399*	*24 550*	*29 214*
35-39	14 866	26 759	40 814	*30 189*	*24 902*	*30 075*	*34 677*
40-44	17 505	29 732	48 980	*32 704*	*29 098*	*33 364*	*38 760*
45-49	19 822	36 022	57 259	*38 611*	*33 800*	*33 364*	*39 729*
50-54	23 031	40 634	66 540	*44 025*	*36 081*	*34 317*	*42 391*
55-59	23 524	42 440	71 581	*44 824*	*38 797*	*35 119*	*43 647*
60-64	23 935	42 751	70 940	*48 264*	*41 370*	*40 875*	*41 890*
65+	28 537	39 374	56 230	*29 151*	*37 354*	*36 095*	*n/a*

* 2016 figures include Germany 2016 figures for Partners/Directors/Sole Principals plus an estimate, based on 2014 Germany data, for employment fields not included in the 2016 survey.

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



4.4 EARNINGS BY GENDER

The long-term trend in earnings data analysed by gender shows that a considerable differential exists - and persists - between the average earnings of male and female architects. This year's survey shows full-time male architects earn 48 per cent more than full-time women; for part-time architects, men earn 12 per cent more than women. The trend figures show that the average earnings of male architects has increased faster than that of female architects, and the differential has widened markedly. This year's full-time earnings differential of 48 per cent compares with 33 per cent in 2014, 43 per cent in 2012 and around 46 per cent in 2010 and 2008.

The part-time average earnings figures have been grossed up to represent full-time equivalence (FTE). As in 2014 (but not 2012 or 2010), average part-time earnings - when adjusted to full-time equivalent - are lower than full-time for male architects; male part-time architects, earn 14 per cent less than their full-time colleagues. Female full and part-time average earnings are identical this year.

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

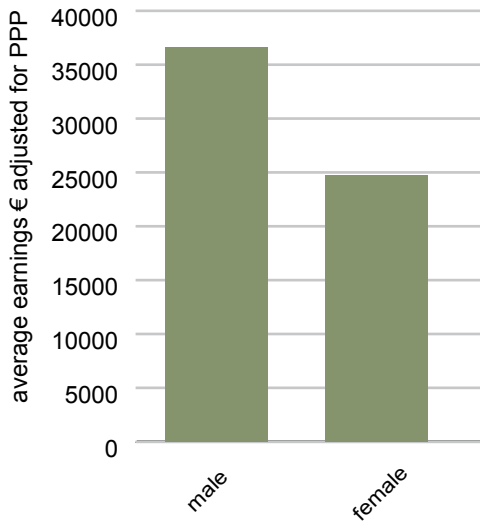


CHART 4-7
CHANGE IN MALE / FEMALE ARCHITECTS' AVERAGE EARNINGS (ALL SURVEY COUNTRIES), 2008-16

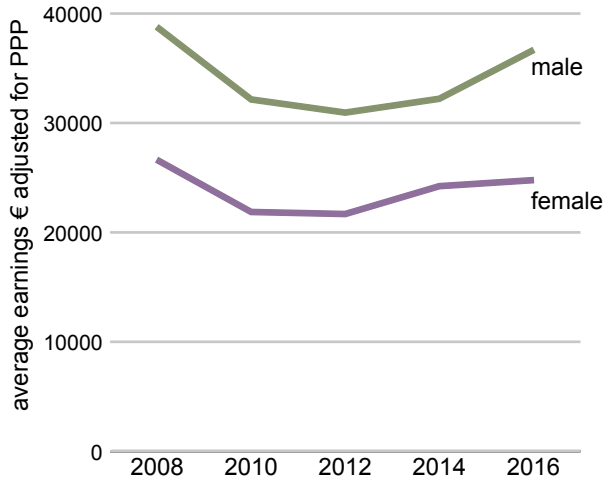


TABLE 4-4
AVERAGE EARNINGS ANALYSED BY GENDER AND FULL-TIME OR PART-TIME WORKING (ADJUSTED FOR PPP AND PART-TIME EARNINGS ADJUSTED TO FULL-TIME EQUIVALENT)

€		2016**			*2014 EUROPE-26 MEDIAN*	*2012 EUROPE-26 MEDIAN*	*2010 EUROPE-23 MEDIAN*	*2008 EUROPE-17 MEDIAN*
		lower quartile	MEDIAN	upper quartile				
Full time	male	19 822	36 664	59 465	*32 213*	*30 948*	*32 149*	*38 760*
	female	12 973	24 777	39 643	*24 225*	*21 680*	*21 866*	*26 620*
Part time FTE*	male	11 614	27 874	49 317	*30 105*	*34 099*	*37 936*	*30 431*
	female	12 074	24 777	41 574	*23 750*	*24 137*	*25 862*	*24 225*

* full-time equivalent (FTE) based on converting part-time earnings to a working week of 37.5 hours
** 2016 figures include Germany 2016 figures for Partners/ Directors/Sole Principals plus an estimate, based on 2014 Germany data, for employment fields not included in the 2016 survey.

4.5 WORKING IN ANOTHER EUROPEAN COUNTRY

Five per cent of architect respondents have worked in another European country in the last 12 months. This is the same proportion as in the last survey. The 2016 figure includes more than 10 per cent of architects in Luxembourg, Slovenia, Austria, the Netherlands and Ireland. On average, architects who have worked in another European country in the last year have worked in just one other country. The figure of 5 per cent of architects who have worked in another European country compares with 36 per cent who have seriously considered working in another country in the past year. At least 40 per cent of architects in Cyprus, Turkey, Poland, Slovenia, Spain and Italy have seriously considered this. By comparing the country in which respondents are established with that where their current office is we can estimate the level of architects working in another country. This figure is 2.2 per cent, almost identical to the 2014 figure (table 4-6).

Eighteen per cent of respondents studied in a different European country from the one in which they are now principally established. This is the same proportion as in the 2014 survey. The highest proportion is recorded by architects in Luxembourg (87 per cent) and in Cyprus (76 per cent).

TABLE 4-5
PROPORTION OF ARCHITECTS WHO HAVE WORKED IN ANOTHER EUROPEAN COUNTRY, LAST 12 MONTHS

per cent / number	architects who have worked in another European country in last 12 months (%)	of whom: average (mean) number of countries working in for...		have seriously considered working in another country, last 12 months (%)	architects part/wholly educated in different country from the one in which principally established (%)
		short periods (up to16 weeks)	longer periods (>16 weeks) or on-going work		
Austria	13	1.2	1.6	22	22
Belgium	9	3.3	0.4	15	22
Bulgaria	9	1.0	0.4	28	20
Croatia	4	0.8	0.6	31	31
Cyprus *	7	1.7	1.0	53	76
Czech Republic *	7	0.3	0.5	23	41
Denmark	6	1.0	0.7	20	31
Estonia *	2	3.0	0.0	33	16
Finland	1	1.0	0.8	14	26
France	4	1.8	1.4	15	25
Germany ***	5	1.3	1.3	n/a	14
Hungary	7	1.4	1.1	21	11
Ireland	12	1.2	0.8	21	35
Italy	4	1.0	0.8	42	12
Lithuania	4	2.2	0.8	7	16
Luxembourg	37	0.9	0.8	33	87
Malta *	0	0.0	0.0	16	33
Netherlands	14	1.5	1.2	18	21
Poland	3	0.0	0.0	45	17
Portugal	5	0.9	0.7	38	25
Romania *	5	1.0	0.0	21	15
Slovakia	9	1.5	0.7	23	18
Slovenia	15	1.2	0.8	44	25
Spain	4	1.0	0.7	42	19
Sweden	4	1.0	0.7	28	37
Turkey	2	4.4	3.0	51	16
United Kingdom	8	1.8	1.1	25	28
2016 EUROPE-27**	5	1.3	1.0	36	18
*2014 EUROPE-26**	*5*	*1.3*	*1.0*	*35*	*18*
*2012 EUROPE-25**	*n/a*	*n/a*	*n/a*	*35*	*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*

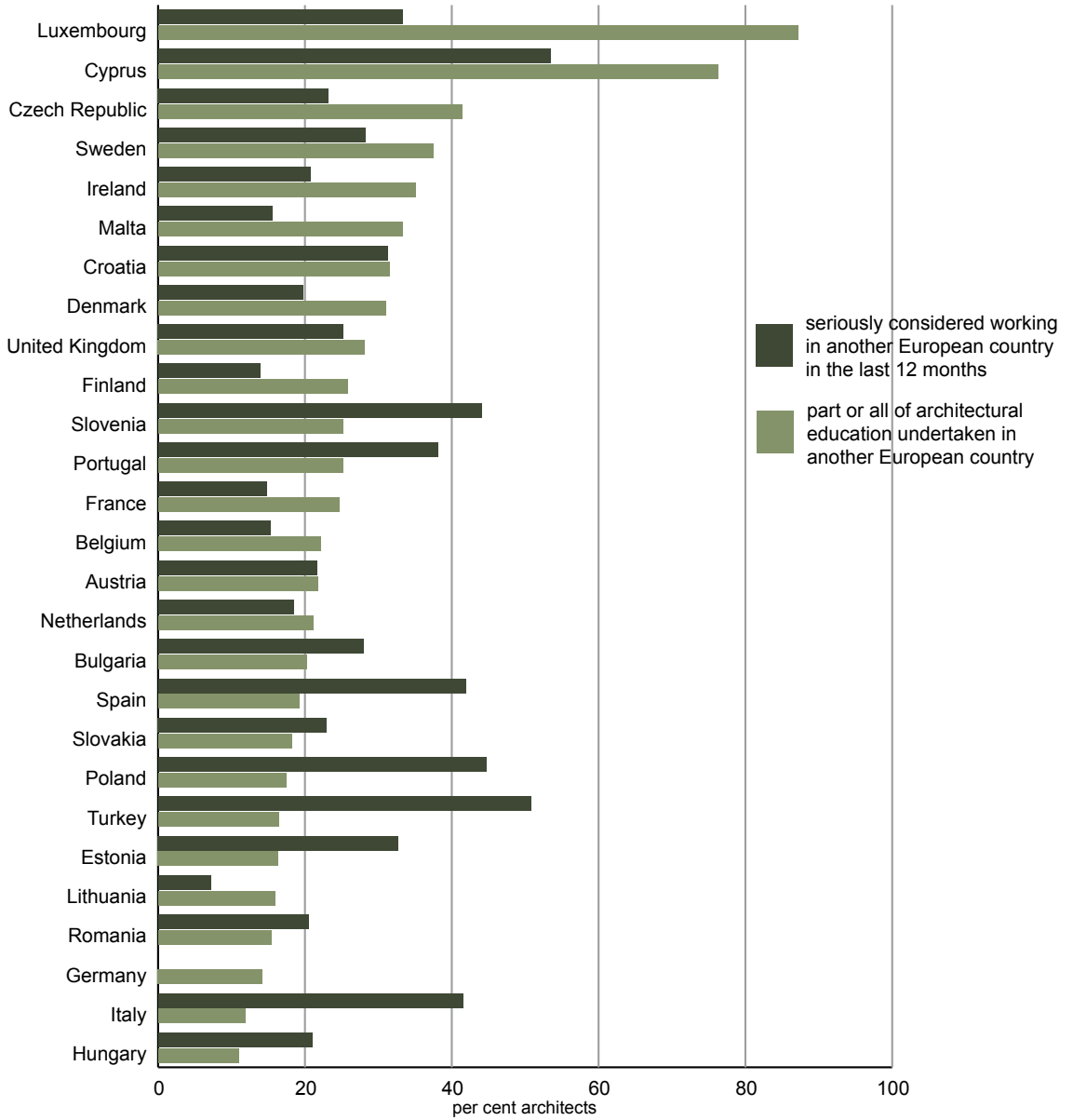
* caution - small sample *** Germany figures are for Partners/Directors/Sole Principals only
n/a = question not asked
** total figure is a weighted average and takes account of the number of architects in each participating country

TABLE 4-6
PROPORTION OF ARCHITECTS WORKING IN A DIFFERENT COUNTRY FROM WHERE PRINCIPALLY ESTABLISHED

per cent	architects working / resident in different country from the one in which principally established (%)
2016 EUROPE-27	2.2
2014 EUROPE-26	*2.3*
*2012 EUROPE-25***	*2.9*
*2010 EUROPE-23***	*3.4*
*2008 EUROPE-17***	*7.0*

** total figure is a weighted average and takes account of the number of architects in each participating country

CHART 4-8
ARCHITECTS WHO WERE AT LEAST PARTLY EDUCATED IN ANOTHER EUROPEAN COUNTRY, COMPARED WITH ARCHITECTS WHO HAVE SERIOUSLY CONSIDERED WORKED IN ANOTHER EUROPEAN COUNTRY



4.6 MAIN CONCERNS ABOUT WORKING IN ANOTHER COUNTRY

Nearly half of respondents think that practical, relocation or personal issues are the main concerns about working in another country. Other significant concerns are not having sufficient knowledge of planning or building regulations and having insufficient language skills. The proportion of respondents who mention each of these top three concerns is very similar to the last survey. However, more architects report two other concerns than did in the 2014 survey; the proportion who are held back by a lack of knowledge of the local market has increased, while many more say they are unable to find work in another country this year. If we compare architects who have worked in another country with those who have not, practical and language concerns are significantly less important amongst those who have already worked in another country.

CHART 4-9
MAIN CONCERNS - WORKING IN ANOTHER COUNTRY

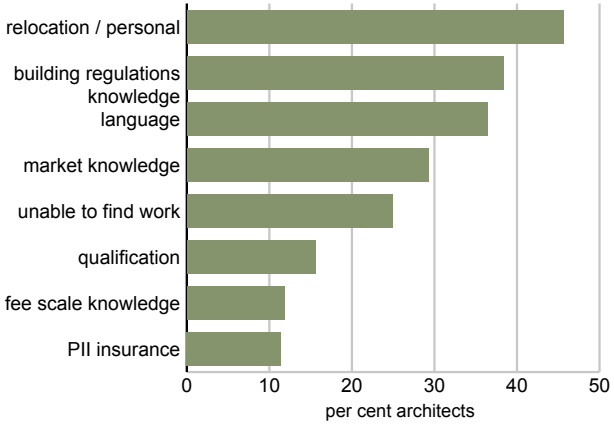


TABLE 4-7
MAIN CONCERNS ABOUT WORKING IN ANOTHER COUNTRY CITED BY RESPONDING ARCHITECTS

per cent	unable to find work	insufficient language skills	insufficient knowledge of planning / building regulations	architectural qualification issues	practical, relocation or personal issues	knowledge of local market	knowledge of local fee scales / tariffs	PII cover for work in other European countries
Austria	11	21	46	7	41	36	13	12
Belgium	9	22	50	8	45	43	14	13
Bulgaria	33	28	46	14	39	37	18	14
Croatia	12	26	43	12	56	29	11	8
Cyprus *	29	22	33	9	48	38	17	12
Czech Republic *	5	43	61	16	45	16	14	14
Denmark	13	27	52	15	72	35	22	7
Estonia *	15	23	39	5	53	22	12	9
Finland	17	39	45	10	47	48	20	15
France	17	39	45	10	47	48	20	15
Germany ***	40	30	42	25	34	30	17	22
Hungary	8	37	36	12	36	24	7	1
Ireland	20	40	45	8	46	30	15	14
Italy	12	41	30	8	68	24	6	6
Lithuania	17	23	27	11	18	27	11	9
Luxembourg	13	6	21	7	28	28	9	8
Malta *	18	16	51	13	60	40	18	16
Netherlands	11	16	37	11	33	32	6	11
Poland	23	44	63	17	33	29	14	15
Portugal	23	23	25	8	54	19	8	5
Romania *	24	21	32	32	53	29	5	8
Slovakia	19	37	41	14	28	43	20	11
Slovenia	37	20	57	15	39	32	13	19
Spain	38	47	48	19	25	34	13	12
Sweden	7	9	16	6	36	12	4	3
Turkey	46	42	32	33	27	26	12	6
United Kingdom	22	45	43	10	42	30	14	13
2016 EUROPE-27	25	36	38	16	46	29	12	11
2014 EUROPE-26	*18*	*38*	*37*	*11*	*47*	*26*	*11*	*10*
2012 EUROPE-25	*19*	*39*	*35*	*11*	*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*
2008 EUROPE-17	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*	*n/a*

* caution - small sample *** Germany figures are for Partners/Directors/Sole Principals only
2012/10/08 n/a = question was not asked

4.7 RETIREMENT

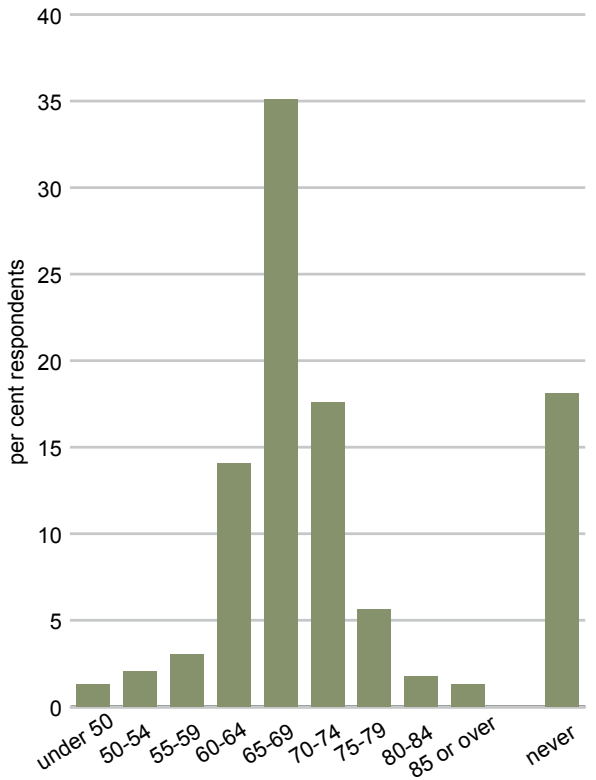
TABLE 4-8
AGE AT WHICH ARCHITECTS EXPECT TO RETIRE, ANALYSED BY COUNTRY

per cent	under 50	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85 or over	never
Austria	1	0	0	6	36	33	9	2	1	12
Belgium	0	0	3	20	48	15	3	1	1	9
Bulgaria	1	1	3	25	28	12	6	3	4	17
Croatia	0	1	3	22	41	8	4	1	1	20
Cyprus *	0	2	0	19	46	14	2	4	0	14
Czech Republic *	0	0	0	20	27	14	5	0	2	32
Denmark	0	0	0	8	52	26	7	1	0	5
Estonia *	0	0	9	6	26	13	11	15	0	20
Finland	0	0	0	22	57	8	2	0	2	7
France	0	0	2	21	42	16	4	2	2	11
Germany	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Hungary	0	0	3	24	33	12	8	1	2	16
Ireland	0	0	2	10	41	25	6	2	1	14
Italy	0	0	1	13	32	21	8	2	1	22
Lithuania	0	0	4	25	42	12	4	1	2	10
Luxembourg	0	0	5	33	33	14	1	2	0	11
Malta *	0	2	9	29	40	9	7	0	0	4
Netherlands	0	0	0	7	49	23	4	2	1	11
Poland	1	2	2	9	25	16	6	5	3	32
Portugal	0	1	2	13	41	10	4	2	2	26
Romania *	0	5	0	22	32	8	3	5	8	16
Slovakia	2	0	2	21	31	15	8	2	2	19
Slovenia	0	1	2	15	39	10	7	2	1	22
Spain	1	0	0	8	44	21	3	1	1	20
Sweden	0	0	1	12	62	16	4	1	0	3
Turkey	9	15	18	21	14	5	1	1	1	16
United Kingdom	0	1	2	12	39	25	6	2	1	11
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

The peak age for retirement is expected to be at age 65 to 69; 35 per cent of architects say they expect to retire at this age. Fourteen per cent expect to retire at age 60 to 64, but just 6 per cent expect to retire at an age younger than 60. Eighteen per cent will not retire before they are aged 70; another 9 per cent will not retire until beyond 75. Eighteen per cent will 'never' retire.

CHART 4-10
AGE AT WHICH ARCHITECTS EXPECT TO RETIRE



The likelihood of respondents continuing to work as an architect until they retire remains virtually unchanged from the last survey. Thirty six per cent will "definitely" continue to work as an architect, 37 per cent will "probably" continue to work.

Nineteen per cent are not sure, while just 6 per cent say they will "probably not" continue to practice as an architect but just 2 per cent say "definitely not". The highest proportions of architects responding "probably not" or "definitely not" are from Italy, Portugal and Spain.

CHART 4-11
LIKELIHOOD OF CONTINUING TO WORK AS AN ARCHITECT UNTIL RETIREMENT

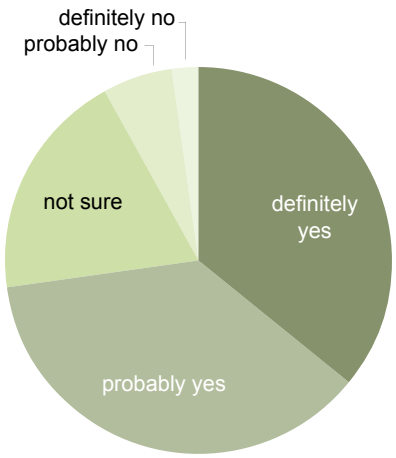


TABLE 4-9
WHETHER ARCHITECTS WILL CONTINUE TO PRACTICE THEIR PROFESSION UNTIL THEY RETIRE

per cent	definitely yes	probably yes	not sure	probably no	definitely no
Austria	51	41	6	2	0
Belgium	28	43	22	4	2
Bulgaria	57	25	16	0	1
Croatia	45	40	11	3	1
Cyprus *	38	45	16	2	0
Czech Republic *	36	45	18	0	0
Denmark	46	41	9	3	1
Estonia *	45	53	2	0	0
Finland	38	50	9	2	0
France	28	42	22	6	2
Germany	n/a	n/a	n/a	n/a	n/a
Hungary	54	30	14	2	0
Ireland	40	43	14	3	1
Italy	29	35	24	8	3
Lithuania	51	34	13	2	1
Luxembourg	50	45	5	0	0
Malta *	13	62	22	2	0
Netherlands	33	46	15	3	2
Poland	52	36	7	3	2
Portugal	39	31	21	7	2
Romania *	78	14	8	0	0
Slovakia	46	39	12	2	1
Slovenia	56	20	19	3	2
Spain	39	32	20	8	1
Sweden	48	39	9	3	1
Turkey	40	39	16	4	1
United Kingdom	37	46	11	4	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

4.8 HOURS WORKED

Sole Principals and Partners & Directors report longer working hours than salaried architects in private practice, who in turn report longer hours than those in the public sector. Partners/Directors work on average 49 hours per week, and Sole Principals 47 hours. Salaried architects in private practice work, on average, 43 hours per week. The average working week in the public sector is 40 hours.

A working week in excess of 50 hours is reported by Sole Principals in Germany, Malta, Belgium, Austria, Cyprus, and Slovakia; and by Partners & Directors in Czech Republic, Lithuania, Malta and Germany. Private practice salaried staff in Belgium also average over 50 hours per week.

TABLE 4-10
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	4.8
freelance	6.8
other private	5.4
local / central government	3.3
other public	4.6
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*

* ALL figure no longer includes Partners/Directors/Sole Principals

TABLE 4-11
AVERAGE (MEAN) NUMBER OF HOURS WORKED PER WEEK, ANALYSED BY COUNTRY AND FIELD OF EMPLOYMENT

hours / week	sole principal	partner/ director	private practice salaried	freelance	other private	local / central government	other public
Austria	50.1	49.5	44.4	46.5	n/a	35.0	n/a
Belgium	50.4	49.6	50.4	46.1	48.1	40.1	43.3
Bulgaria	46.8	47.9	45.3	47.5	39.3	49.3	28.3
Croatia	43.5	46.9	42.7	47.5	41.0	41.5	45.5
Cyprus *	50.2	48.0	39.9	50.0	40.0	38.0	39.3
Czech Republic *	49.9	55.0	46.7	42.0	n/a	38.0	n/a
Denmark	44.1	46.3	39.1	46.0	40.4	37.2	38.2
Estonia *	48.0	44.0	47.2	n/a	n/a	40.0	40.0
Finland	44.6	45.5	39.2	50.0	41.3	39.3	40.2
France	48.1	44.6	43.3	46.3	46.5	41.0	41.8
Germany ***	51.7	51.6	41.7	47.7	48.9	40.4	n/a
Hungary	48.0	40.0	41.5	45.0	47.4	40.9	38.3
Ireland	46.5	47.0	42.8	46.3	43.8	41.2	43.3
Italy	41.6	44.4	42.2	43.3	42.8	39.7	38.9
Lithuania	45.4	53.8	40.1	52.4	45.1	39.8	40.0
Luxembourg	40.3	45.8	44.7	39.6	36.2	n/a	n/a
Malta *	51.7	60.0	45.8	55.0	45.0	44.7	45.0
Netherlands	47.3	48.7	42.8	41.6	45.3	39.0	41.7
Poland	47.0	46.0	45.9	46.9	41.8	47.5	40.0
Portugal	42.2	42.9	43.6	43.0	45.4	38.1	40.8
Romania *	47.6	47.1	44.8	n/a	45.3	40.0	49.0
Slovakia	50.1	46.6	45.3	49.1	44.8	43.0	45.0
Slovenia	38.9	47.8	42.7	42.1	41.4	43.0	43.3
Spain	47.0	46.8	42.1	41.6	42.8	47.5	45.3
Sweden	45.5	44.1	41.2	35.0	42.9	41.7	46.1
Turkey	47.6	46.3	49.7	44.0	52.9	40.3	40.4
United Kingdom	42.4	43.6	43.3	44.4	42.9	40.6	40.2
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

*** Germany figures provided by BAK, sourced from BAK surveys 2015 and 2016.

4.9 CONTINUING PROFESSIONAL DEVELOPMENT (CPD)

The number of hours of CPD undertaken per year by architects is higher this year (average of 24 hours) compared with the 2014 survey (20 hours). Both figures are below the average number of hours recorded in 2012. The average number of hours of CPD undertaken varies considerably between countries, ranging from zero (Turkey, France, Czech Republic) to 100 (Bulgaria). Half the countries surveyed report averages of between 15 and 35 hours per year.

The personal expenditure on CPD activities also varies considerably. The average spend is €300, but in Austria and Denmark the spend is €1000 or more. Personal expenditure on CPD is higher than in the 2014 survey but the same as in 2012; in 2014 several countries reported zero spend while this year none report zero.

Partners and Directors report the highest average number of hours spent undertaking CPD; and they also report the highest personal spend on CPD of any of the main employment groups.

TABLE 4-12
CPD HOURS AND SPEND, ANALYSED BY COUNTRY

	average (median) number hours CPD per year	average (median) personal expenditure on CPD, € per year
Austria	30	1000
Belgium	20	500
Bulgaria	100	524
Croatia	10	163
Cyprus *	16	111
Czech Republic *	0	n/a
Denmark	20	1343
Estonia *	20	800
Finland	10	500
France	0	n/a
Germany ***	30	n/a
Hungary	50	160
Ireland	40	500
Italy	25	250
Lithuania	10	150
Luxembourg	16	800
Malta *	5	120
Netherlands	24	500
Poland	24	500
Portugal	8	246
Romania *	10	400
Slovakia	10	558
Slovenia	35	325
Spain	18	450
Sweden	20	869
Turkey	0	n/a
United Kingdom	35	255
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*

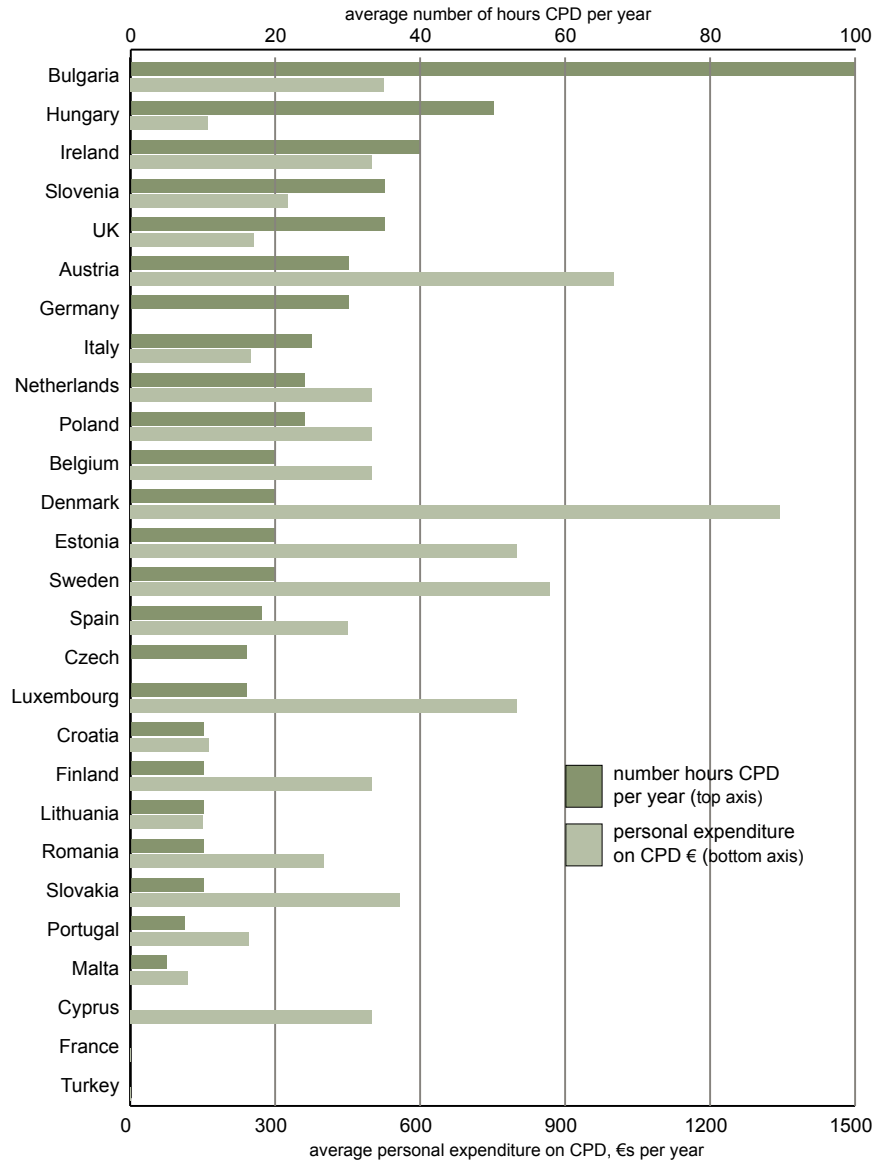
* caution small sample ** question was not asked in 2008 or 2010
*** Germany figures are for Partners/Directors/Sole Principals only

TABLE 4-13
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	300
partner/director	30	500
private practice salaried	20	250
freelance	20	221
other private	20	300
local / central government	24	200
other public	20	200
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*

* question was not asked in 2008 or 2010

CHART 4-12
CPD HOURS (TOP AXIS) AND SPEND (BOTTOM AXIS), ANALYSED BY COUNTRY



4.10 BUILDING TO NEARLY ZERO ENERGY STANDARDS

TABLE 4-14
HOW OFTEN ARCHITECTS ARE BEING ASKED TO BUILD TO NEARLY ZERO ENERGY STANDARDS, ANALYSED BY COUNTRY

per cent respondents	less than 10% of the time	between 10% and 25% of the time	between 26% and 50% of the time	more than 50% of the time	always
Austria	32	15	17	29	8
Belgium	58	18	12	10	3
Bulgaria	62	19	13	5	1
Croatia	69	13	8	7	3
Cyprus *	43	16	10	16	16
Czech Republic *	76	15	2	2	5
Denmark	56	13	11	14	6
Estonia *	43	21	13	23	0
Finland	64	13	10	9	3
France	60	16	10	9	5
Germany **	n/a	n/a	n/a	n/a	n/a
Hungary *	n/a	n/a	n/a	n/a	n/a
Ireland	70	14	7	7	3
Italy	57	17	13	9	5
Lithuania	32	22	19	13	14
Luxembourg	27	20	11	30	12
Malta *	63	23	5	7	2
Netherlands	55	21	14	8	2
Poland	84	13	2	0	1
Portugal	66	14	10	7	3
Romania *	71	13	13	3	0
Slovakia	59	22	12	7	0
Slovenia	69	10	10	11	1
Spain	75	7	4	7	6
Sweden	82	10	5	2	2
Turkey	72	10	7	5	5
United Kingdom	76	10	9	3	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 ** no data because question was not asked 2008 - question was not asked in 2008

Architects report that they are being asked less frequently to build to Nearly Zero Energy standards now than in previous years. In 2016, 11 per cent of respondents are being asked by their clients to build to Nearly Zero Energy standards more than 50 per cent of the time, or always. This proportion of 11 per cent compares with 14 per cent in 2014 and 12 per cent in the previous two surveys. Similarly, the proportion of respondents who are being asked to build to Nearly Zero Energy standards "less than 10 per cent of the time" is now 65 per cent, compared with no more than 59 per cent in the previous three surveys. Countries with the highest proportion of architects saying that they are being asked to build to Nearly Zero Energy standards are Austria, and Luxembourg plus other countries with small sample sizes.

CHART 4-13
HOW OFTEN ARCHITECTS ARE CURRENTLY BEING ASKED TO BUILD TO NEARLY ZERO ENERGY STANDARDS

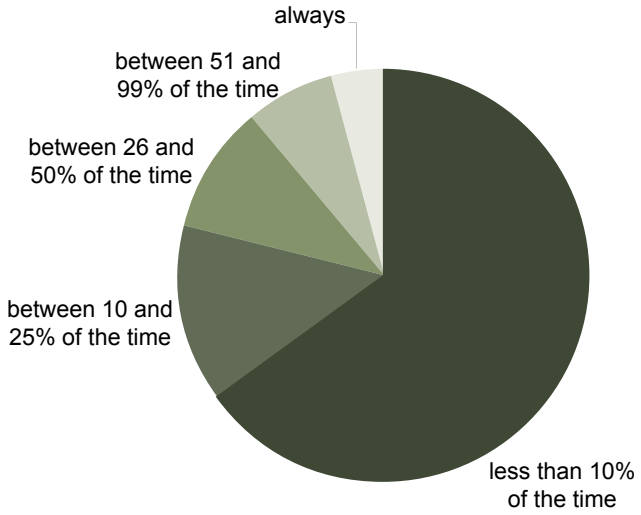


TABLE 4-15
HOW OFTEN ARCHITECTS ARE CURRENTLY BEING ASKED TO DESIGN ENERGY EFFICIENCY AS A RETROFIT SERVICE BY THEIR CLIENTS, ANALYSED BY COUNTRY

per cent respondents	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	34	27	22	14	3
Belgium	19	21	23	29	8
Bulgaria	35	27	14	13	11
Croatia	47	24	16	10	2
Cyprus *	48	14	20	12	6
Czech Republic *	68	19	12	2	0
Denmark	43	14	20	15	8
Estonia *	32	4	17	36	11
Finland	80	8	5	6	1
France	36	21	19	16	8
Germany **	n/a	n/a	n/a	n/a	n/a
Hungary	n/a	n/a	n/a	n/a	n/a
Ireland	39	20	17	20	3
Italy	62	18	13	7	0
Lithuania	10	6	4	3	77
Luxembourg	28	25	16	19	11
Malta *	60	22	4	7	7
Netherlands	35	22	23	21	0
Poland	n/a	n/a	n/a	n/a	n/a
Portugal	59	19	14	7	0
Romania *	44	11	7	4	35
Slovakia	40	24	25	9	2
Slovenia	39	18	16	23	3
Spain	71	16	7	4	2
Sweden	73	13	7	4	2
Turkey	75	11	8	5	2
United Kingdom	61	17	11	9	2
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 ** no data because question was not asked
2008/10/12 question was not asked in previous surveys

Compared with being asked to build to Nearly Zero Energy standards, twice as many architects - 18 per cent - say they are being asked to design energy efficiency as a retrofit service by their clients more than 50 per cent of the time. This includes 30 per cent or more of architects in Belgium, Estonia and Romania.

In contrast to the Nearly Zero Energy standards question, architects report an increasing demand from their clients to design energy efficiency as a retrofit, compared with the 2014 survey. This year's figure of 18 per cent compares with 13 percent in 2014, and the proportion who are being asked less than 10 per cent of the time this year is 50 per cent, less than the 60 per cent recorded in 2014.

SECTION 2: COUNTRY PROFILES

Architect: Enota
Project: Promenada
Photo: Miran Kambic
Place: Velenje, Slovenia

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Netherlands	85
Poland	86
Portugal	87
Romania	88
Slovakia	89
Slovenia	90
Spain	91
Sweden	92
Switzerland	93
Turkey	94
United Kingdom	95

Austria

Autriche

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

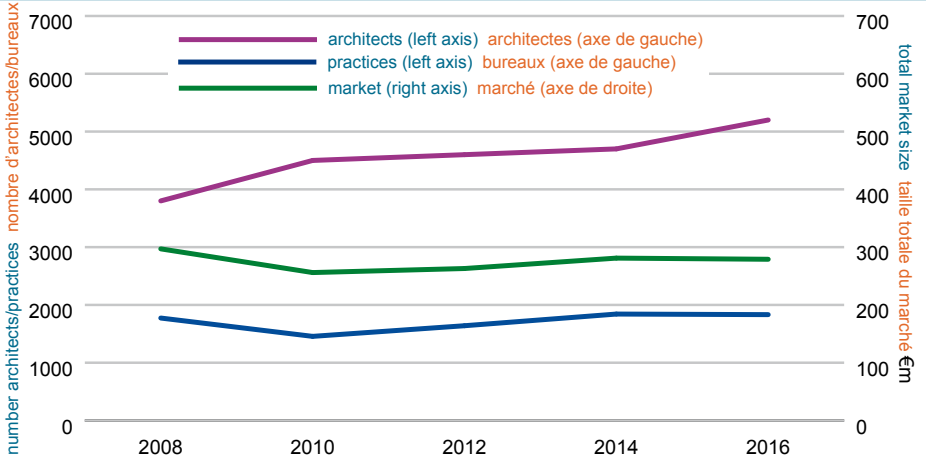
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

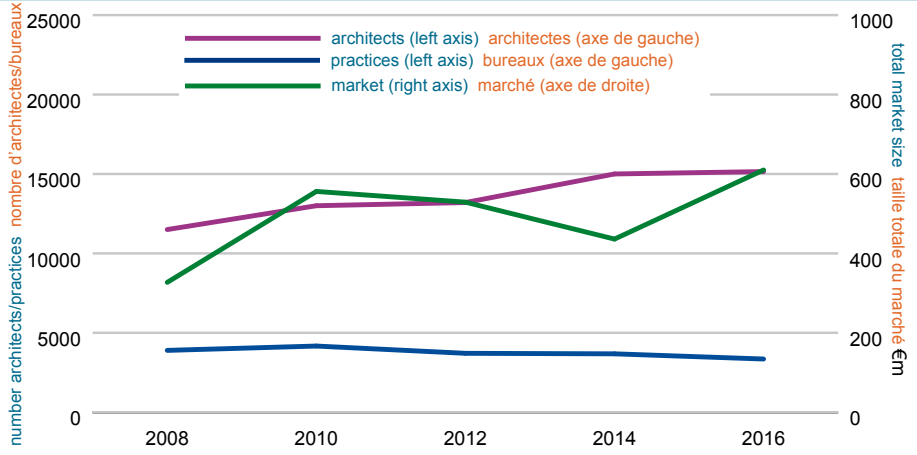
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

Architectural Profession Profession d'architecte

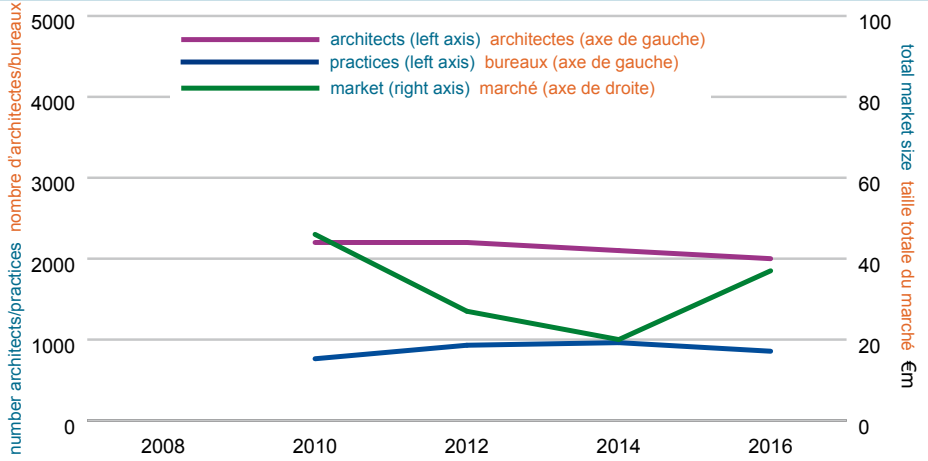
	2008	2010	2012	2014	2016
Architects Architectes	n/a	2 200*	2 200*	2 100*	2 000
% Male Homme	n/a	50	45	47	46
% Female Femme	n/a	50	55	53	54
% <40 years <40 ans	n/a	45	41	46	45
Practices Bureaux	n/a	763	930	962	856

* revised * révisé

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Croatia

Croatie

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

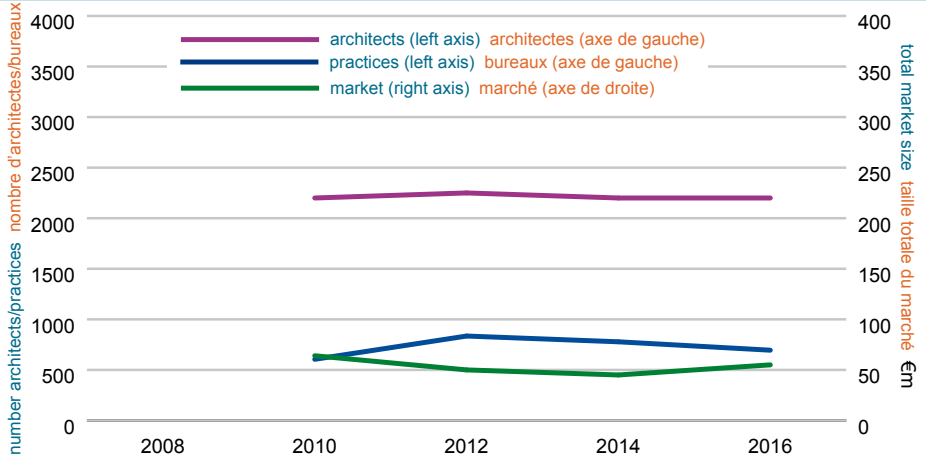
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Cyprus Chypre

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

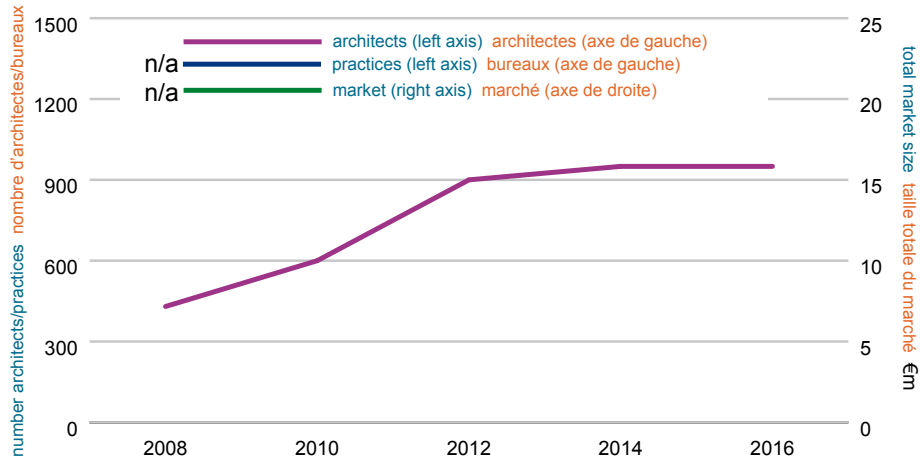
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	15 000
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	1 900
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	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
Local / central government Collectivité locale / gouvernement	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

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

Response Réponse

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

MIRZA & NACEY RESEARCH

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CONSEIL DES ARCHITECTES D'EUROPE

Czech Republic

République Tchèque

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

Architectural Profession Profession d'architecte

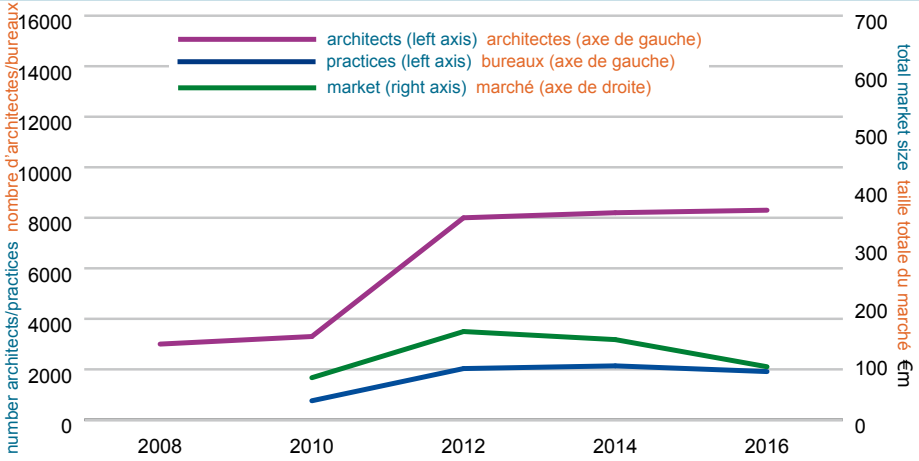
* 2012 data revised

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

Architectural Profession Profession d'architecte

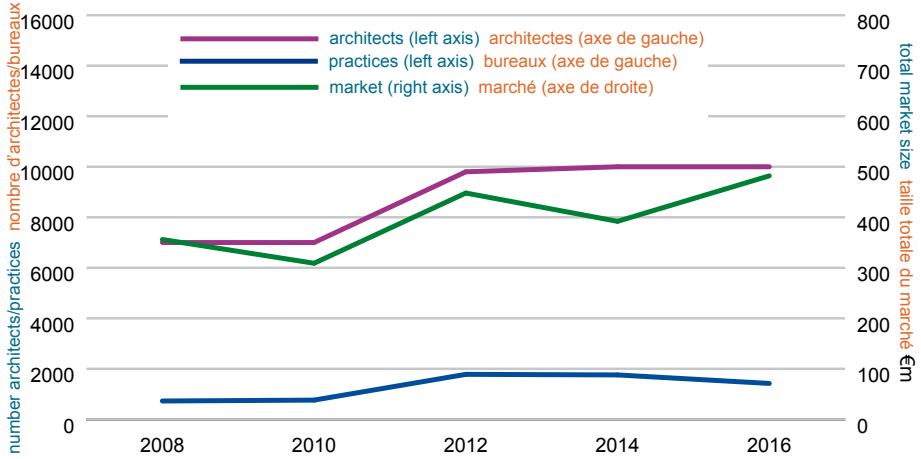
* 2012 data revised

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

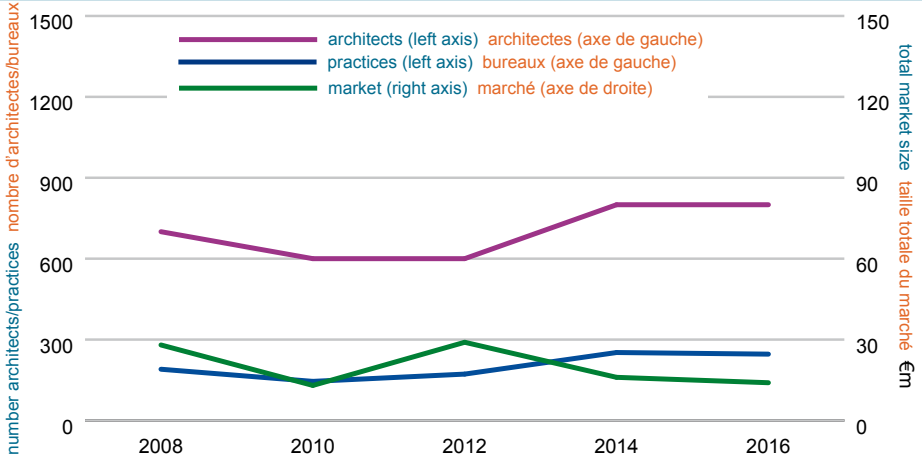
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	41 280	n/a	7 200	35 500	n/a
Partners & Directors Associé dirigeant	25 800	n/a	20 000	13 000	22 000
Private practice Salaried Salarié – Secteur privé	n/a	11 504	13 500	17 750	15 000
Private in-house L'industrie / commerce	n/a	n/a	10 000	n/a	n/a
Freelance Indépendant	n/a	15 786	n/a	n/a	n/a
Other Private Autres – Secteur privé	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
Other Public Autre – secteur public	25 800	11 504	10 080	n/a	n/a

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

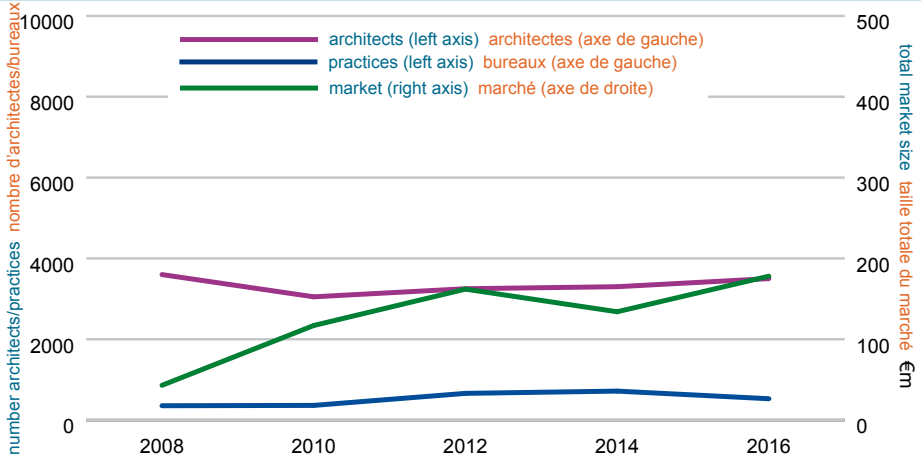
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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

MIRZA & NACEY RESEARCH

ARCHITECTS' COUNCIL OF EUROPE
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Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

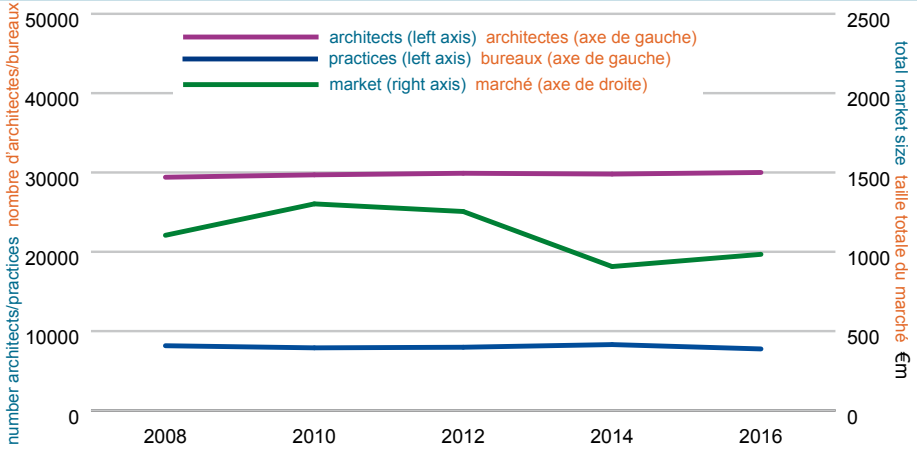
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Germany

Allemagne

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

Architectural Profession Profession d'architecte

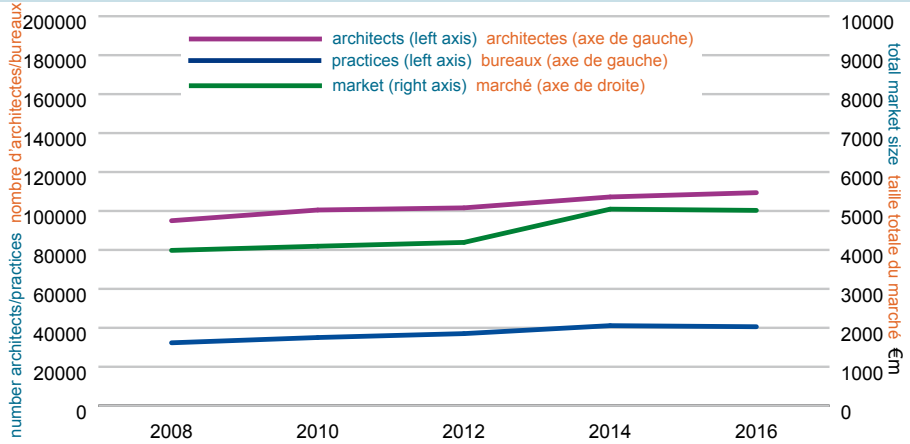
	2008	2010	2012	2014	2016
Architects Architectes	95 000	100 500	101 600	107 200	109 200
% Male Homme	71	79	64	57	66*
% Female Femme	29	21	36	43	34*
% <40 years <40 ans	31	14	35	41	23*
Practices Bureaux	32 311	35 021	37 026	41 117	40 558

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

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

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

Earnings Revenus

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

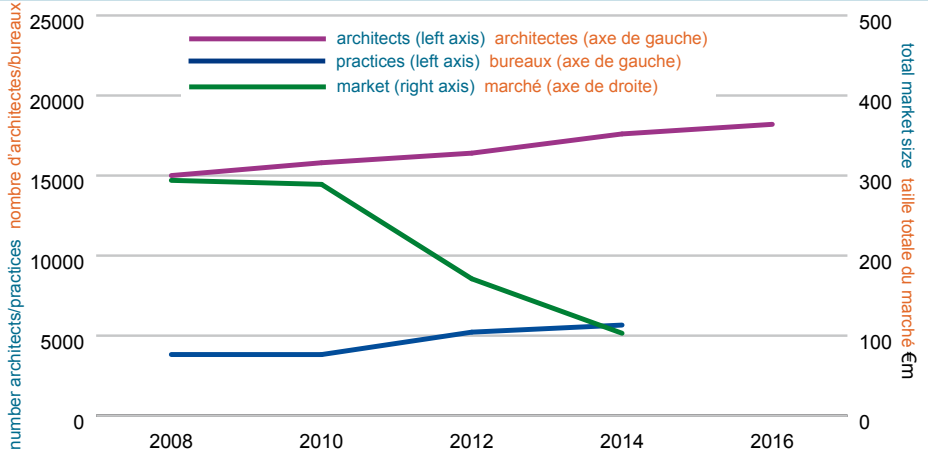
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

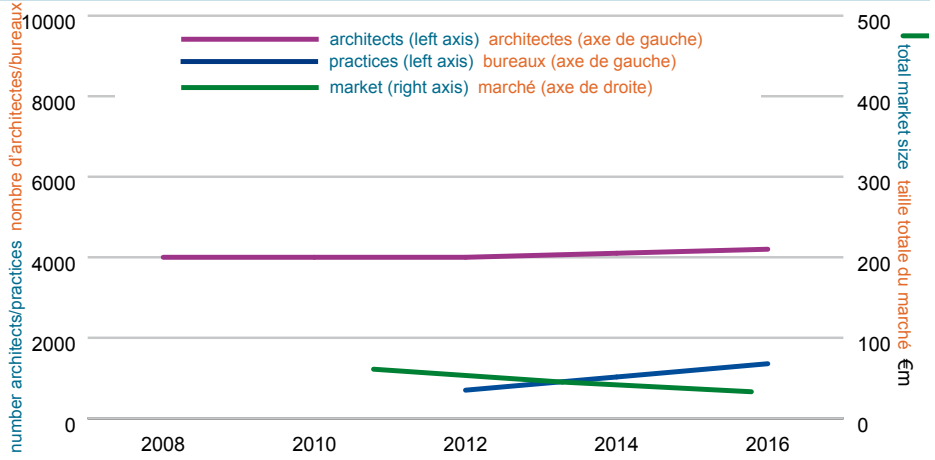
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

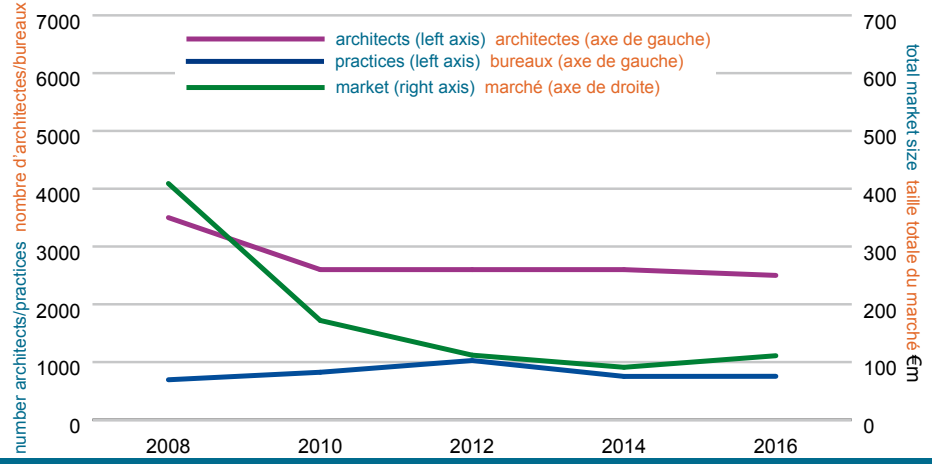
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

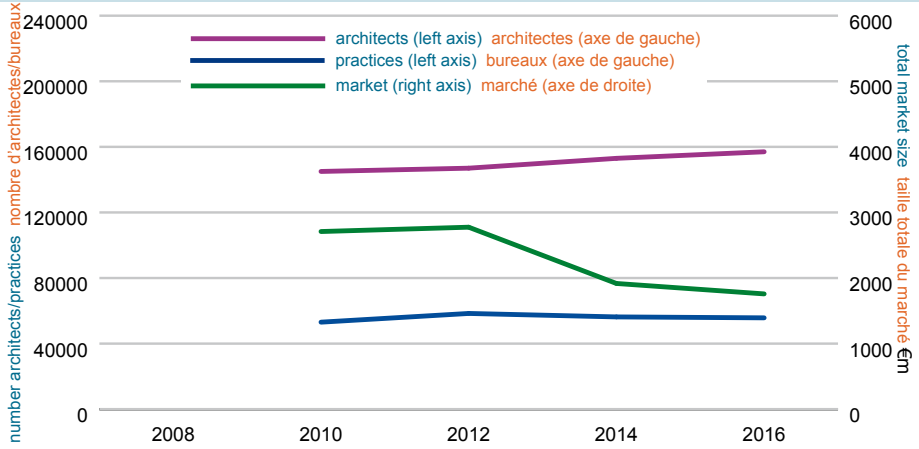
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Latvia

Lettonie

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

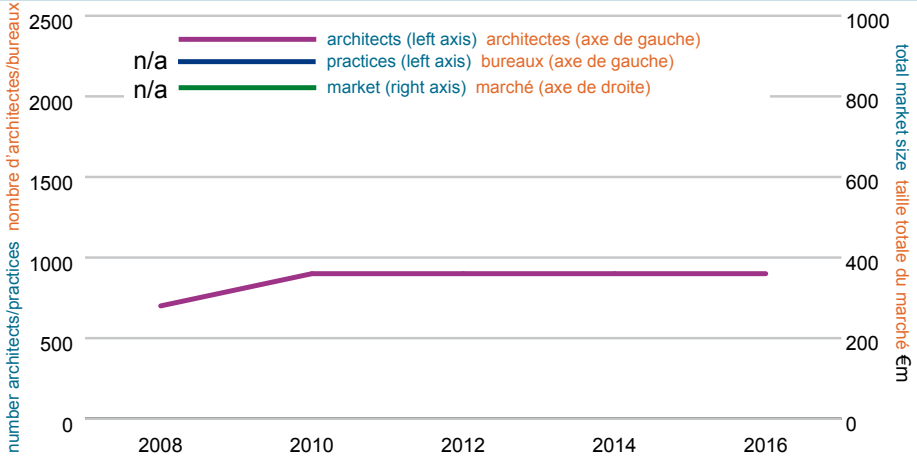
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	n/a	n/a	n/a	19 200	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	4 275	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	3 350	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	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
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	1 060	n/a
Other Public Autre – secteur public	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
Participants Répondants	n/a	5	n/a	36	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-44	n/a	+/- 16.0	n/a

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

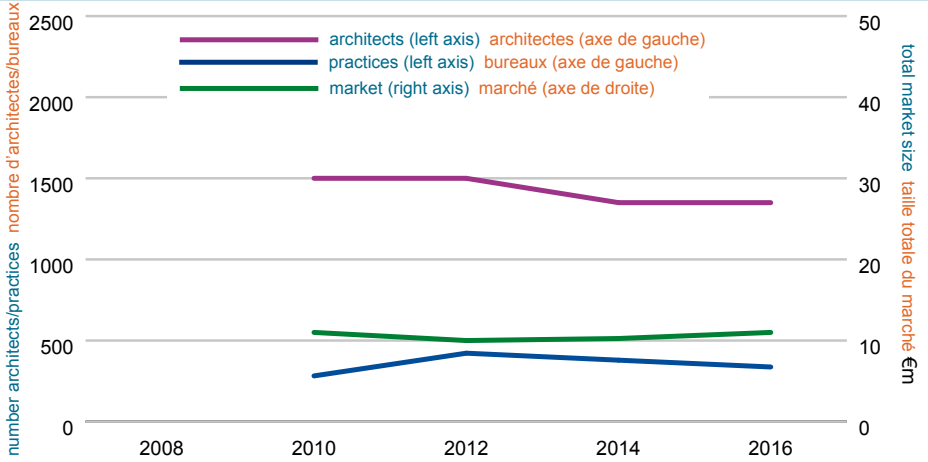
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	n/a	8 689	n/a	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	5 792	n/a	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	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
Local / central government Collectivité locale / gouvernement	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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

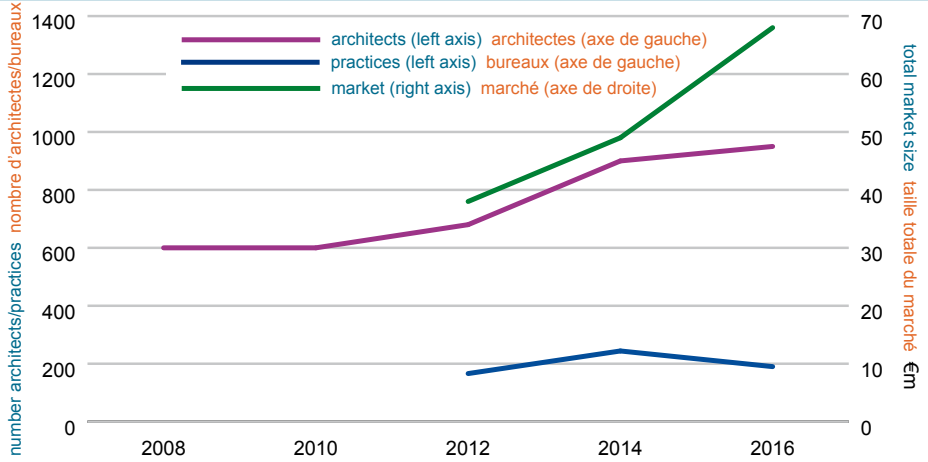
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	57 000	n/a	56 000	56 000	52 050
Partners & Directors Associé dirigeant	45 000	n/a	75 000	70 000	88 000
Private practice Salaried Salarié – Secteur privé	90 000	n/a	82 000	48 000	90 750
Private in-house L'industrie / commerce	n/a	n/a	31 000	n/a	n/a
Freelance Indépendant	50 000	n/a	50 000	57 000	60 000
Other Private Autres – Secteur privé	n/a	n/a	n/a	60 000	80 000
Local / central government Collectivité locale / gouvernement	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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

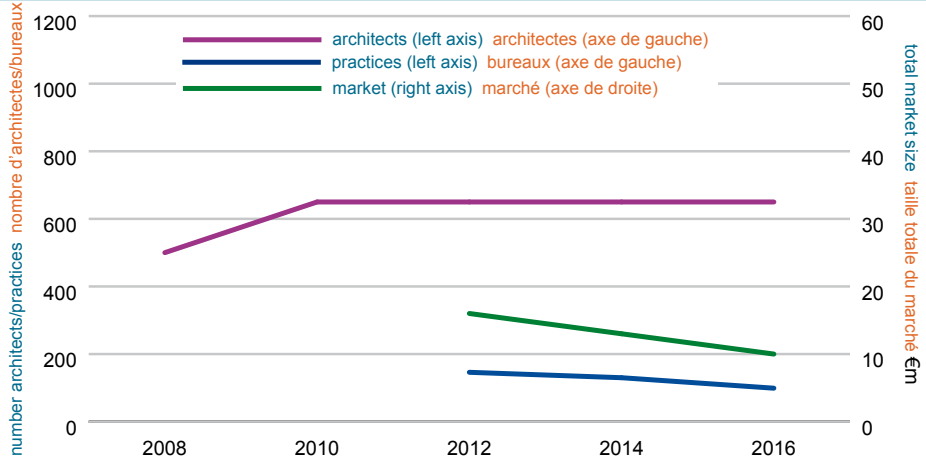
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

Architectural Profession Profession d'architecte

* 2012 / 2014: BNA Annual Benchmark Research

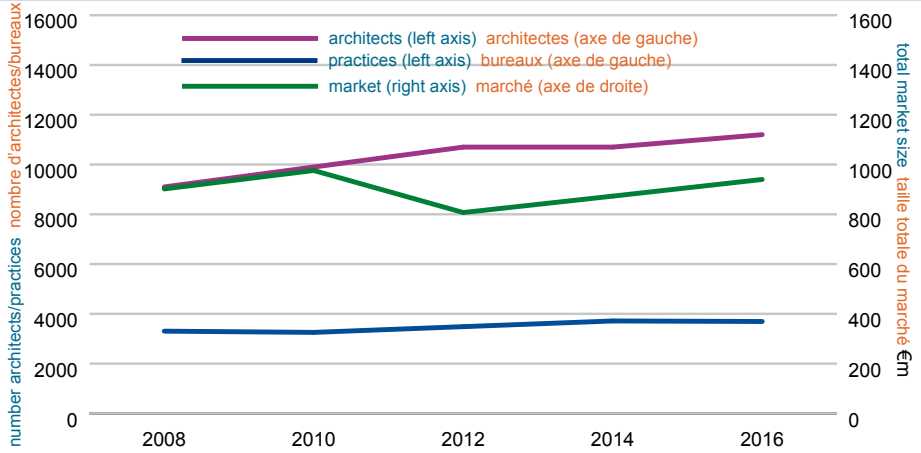
	2008	2010	2012*	2014*	2016
Architects Architectes	9,100	9,900	10 700	10 900	11 200
% Male Homme	86	81	79	79	80
% Female Femme	14	19	21	21	20
% <40 years <40 ans	32	32	35	35	39
Practices Bureaux	3,304	3,255	n/a	3 714	3 692

Architectural Market Marché de l'architecture

* 2012 / 2014: BNA Annual Benchmark Research

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

* 2012 / 2014: BNA Annual Benchmark Research

per cent pourcentage

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

Earnings Revenus

* 2012 / 2014: BNA Annual Benchmark Research

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

2012/14: BNA Annual Benchmark Research 2012 151 / 2016 135 Participants Répondants

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

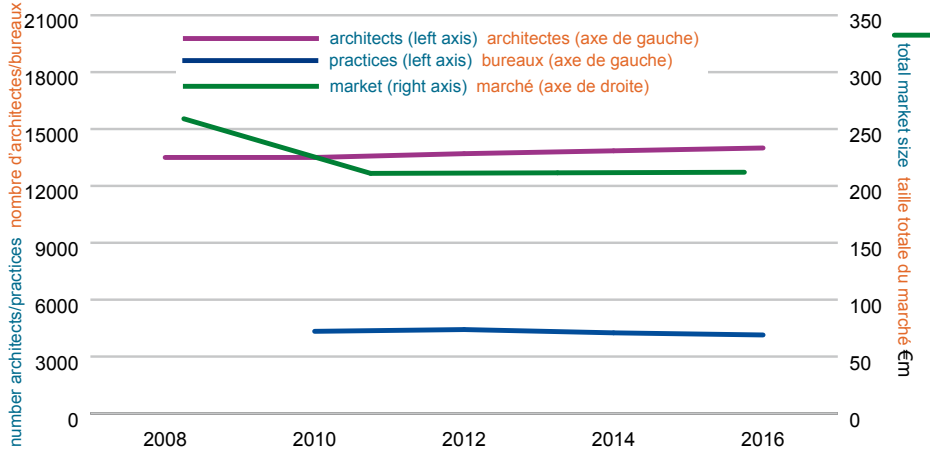
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

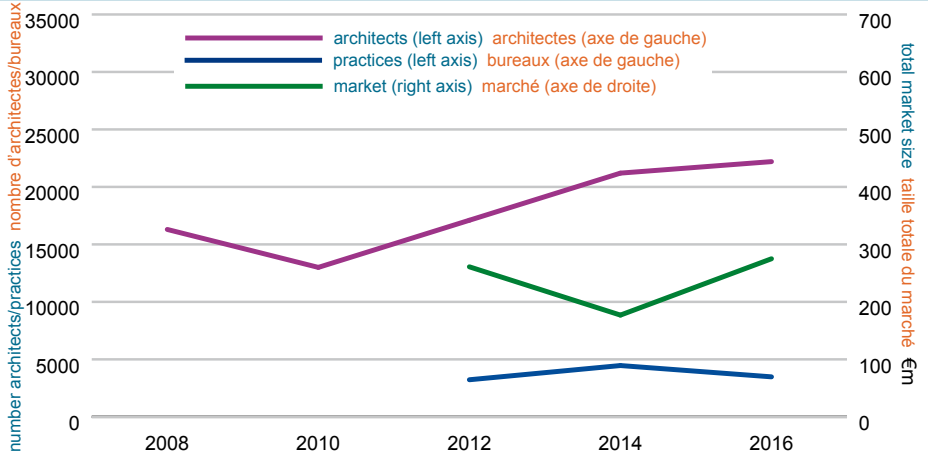
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

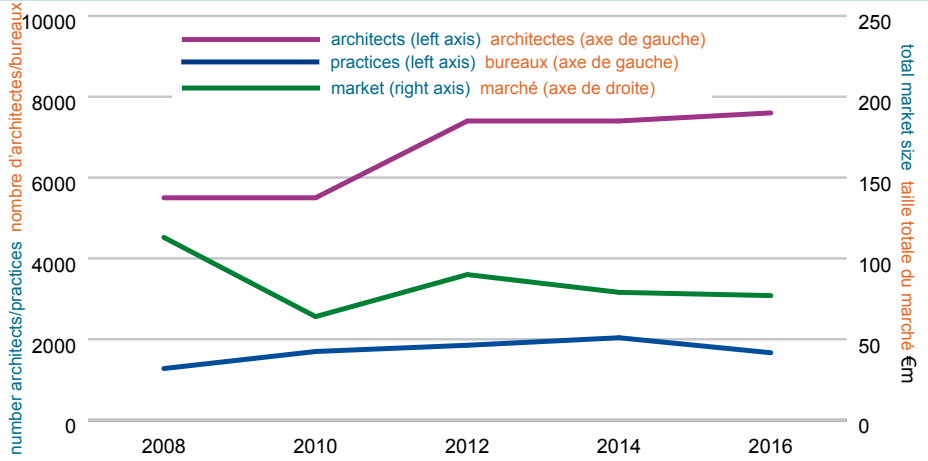
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

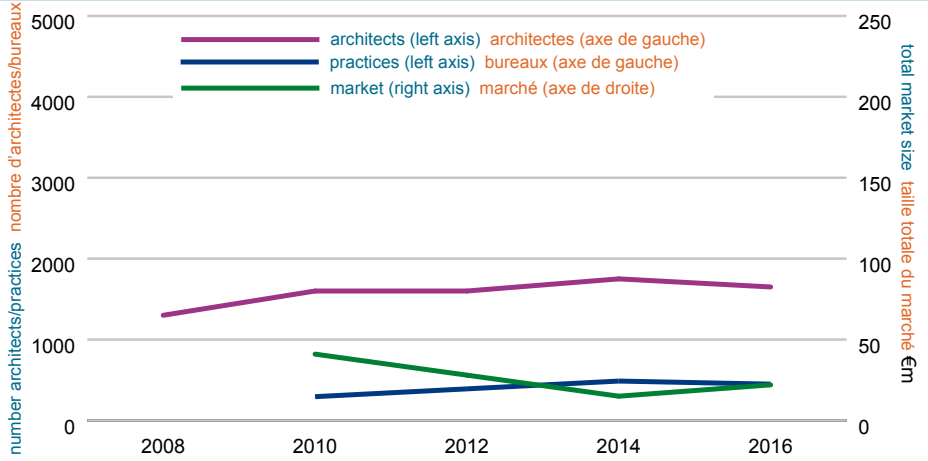
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

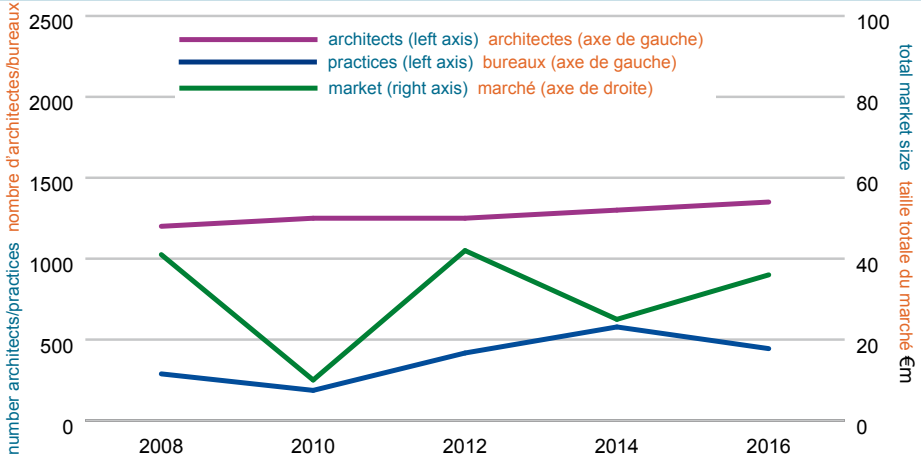
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

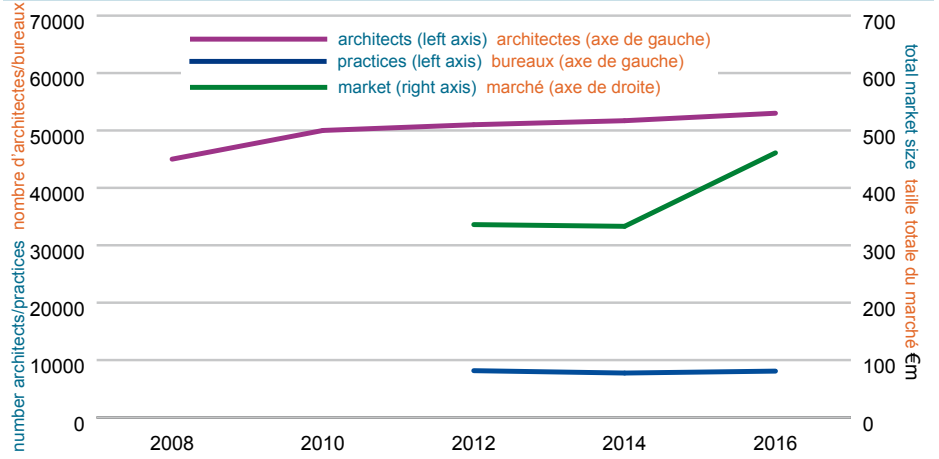
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

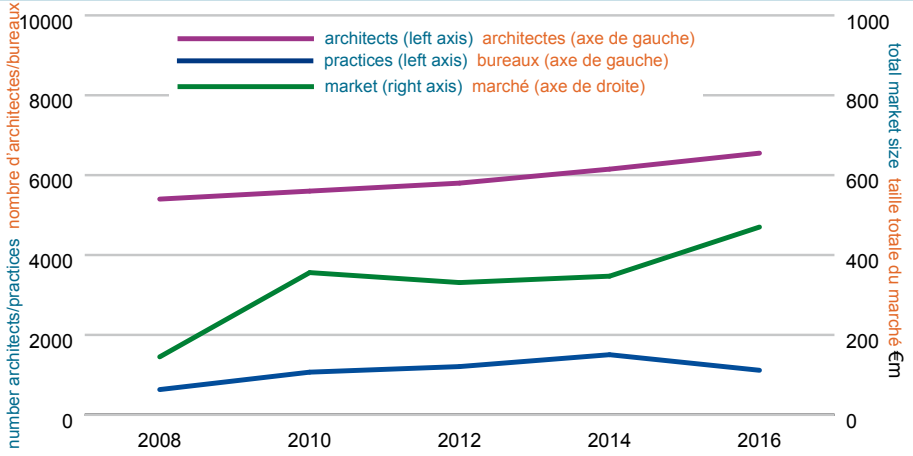
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

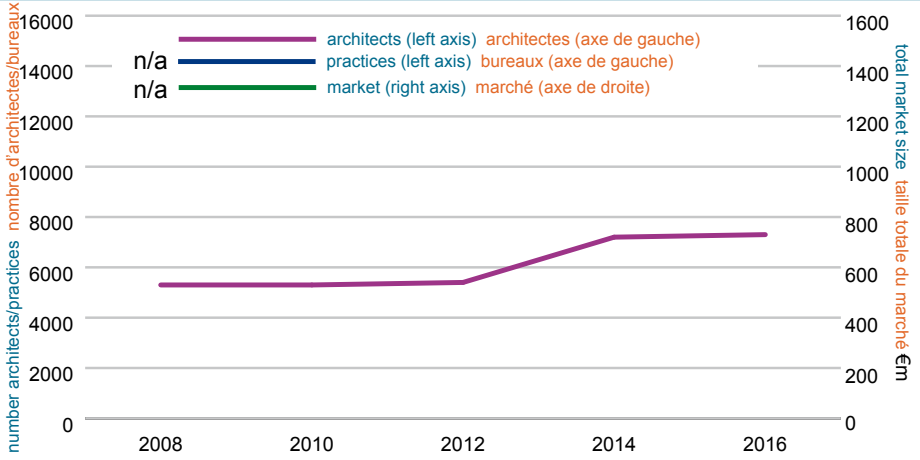
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	n/a	n/a	n/a	90 175	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	98 373	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	69 271	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	59 024	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	90 175	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	111 489	n/a
Other Public Autre – secteur public	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
Participants Répondants	n/a	n/a	n/a	200	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	+/- 6.8	n/a

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2008	2010	2012	2014	2016
Population	70 586 256	72 561 312	74 724 269	76 667 864	78 741 053
GDP PIB € m	498 602	533 121	555 249	617 794	653 315
GDP/PIB head/habitant €	7 064	7 347	7 431	8 058	8 297
Construction € m	23 572	n/a	22 365	27 499	30 221

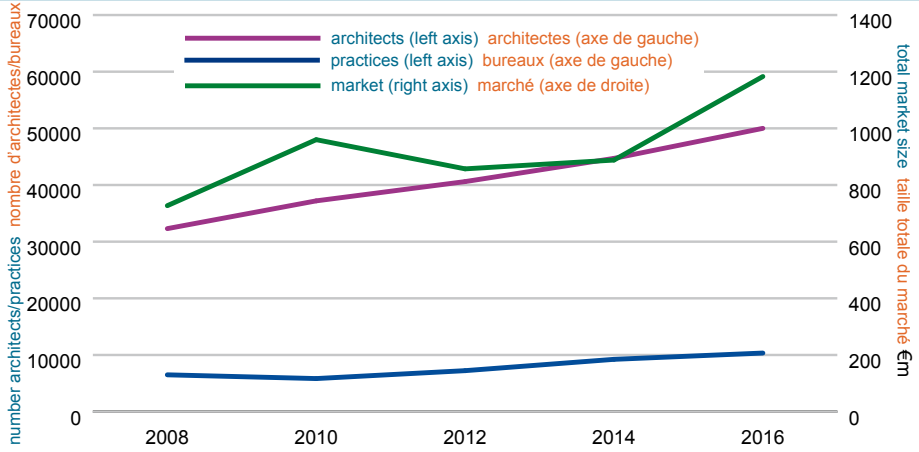
Architectural Profession Profession d'architecte

	2008	2010	2012	2014	2016
Architects Architectes	32 300	37 200	40 600	44 700	50 000
% Male Homme	53	55	55	52	54
% Female Femme	47	45	45	48	46
% <40 years <40 ans	61	64	57	62	66
Practices Bureaux	6 497	5 836	7 232	9 231	10 341

Architectural Market Marché de l'architecture

	2008	2010	2012	2014	2016
Market Marché (€ m)	727	960	857	888	1 183
Average revenue per practice (€) : Revenu moyen par bureaux d'architecture (€) :					
2 persons personnes	38 556	40 837	47 648	31 548	33 645
6 - 10 persons personnes	154 042	388 736	225 491	339 257	220 272

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

	per cent pourcentage				
	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	10	19	22	19	17
Partners & Directors Associé dirigeant	20	10	9	9	7
Private practice Salaried Salarié – Secteur privé	35	41	42	50	48
Private in-house L'industrie / commerce	1	1	0	0	0
Freelance Indépendant	13	10	7	5	7
Other Private Autres – Secteur privé	4	3	2	1	2
Local / central government Collectivité locale / gouvernement	7	5	6	7	7
Other Public Autre – secteur public	11	12	11	10	12

Earnings Revenus

	Average earnings €* Revenu moyen en € *				
	2008	2010	2012	2014	2016
Sole Principals Dirigeant unique	26 366	30 909	28 012	26 040	29 675
Partners & Directors Associé dirigeant	26 366	18 545	25 857	34 263	18 742
Private practice Salaried Salarié – Secteur privé	13 988	12 363	11 205	8 806	10 496
Private in-house L'industrie / commerce	17 577	17 669	14 760	n/a	n/a
Freelance Indépendant	11 952	15 222	14 652	13 534	12 791
Other Private Autres – Secteur privé	14 062	12 363	15 514	12 335	5 623
Local / central government Collectivité locale / gouvernement	10 546	12 363	13 446	14 802	14 994
Other Public Autre – secteur public	14 648	14 424	15 514	11 478	14 057

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

Response Réponse

	2008	2010	2012	2014	2016
Participants Répondants	1 594	1 332	910	605	694
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-2	+/-3	+/- 3.2	+/- 4.0	+/- 3.7

United Kingdom

Royaume-Uni

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

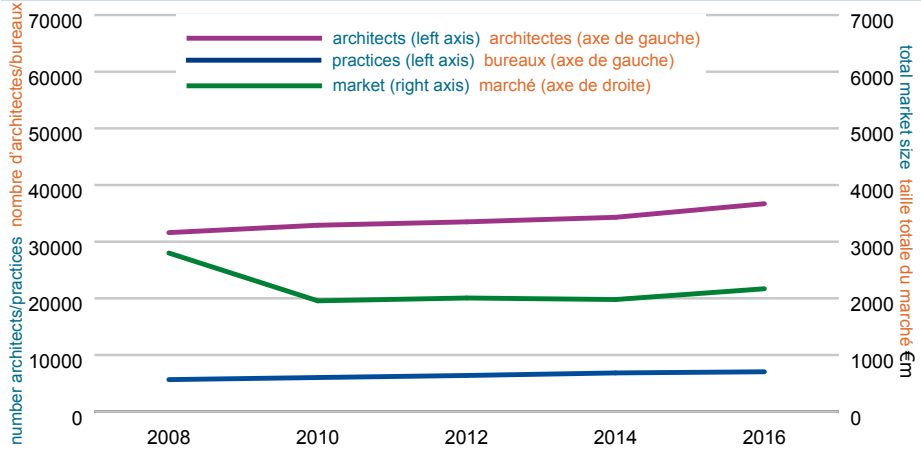
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-16 Tendances 2008-16



Field of Employment Domaine d'activité

per cent pourcentage

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

Earnings Revenus

Average earnings €* Revenu moyen en € *

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

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

Response Réponse

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

Appendix

A1 SURVEY METHODOLOGY

The 2016 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 32 countries from which the ACE drew its membership at the time of the Study in 2016 were invited to participate and 27 countries took part.

It was with the direct cooperation of the Member Organisations of the ACE that it was 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	0	392	392	3 200	12.3
Belgium	75	421	496	5 500	9.0
Bulgaria	0	147	147	3 500	4.2
Croatia	0	318	318	2 750	11.6
Cyprus	5	54	59	n/a	n/a
Czech Republic	3	56	59	n/a	n/a
Denmark	333	126	459	5 829	7.9
Estonia	0	55	55	280	19.6
Finland	308	110	418	2 295	18.2
France	303	715	1 018	20 828	4.9
Germany	0	6 029	6 029	n/a	n/a
Hungary	7	151	158	n/a	n/a
Ireland	157	165	322	2 500	12.9
Italy	6 689	5 879	12 568	117 600	10.7
Lithuania	5	138	143	498	28.7
Luxembourg	6	80	86	560	15.4
Malta	34	11	45	857	5.3
Netherlands	71	411	482	9 700	5.0
Poland	139	62	201	n/a	n/a
Portugal	457	261	718	9 675	7.4
Romania	13	26	39	800	4.9
Slovakia	44	99	143	1 675	8.5
Slovenia	38	73	111	1 255	8.8
Spain	120	263	383	n/a	n/a
Sweden	35	626	661	4 900	13.5
Turkey	492	202	694	36 000	1.9
United Kingdom	658	416	1 074	n/a	n/a
2016 EUROPE-27	9 992	17 286	27 278	230 202	11.8

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

The Sector Study was aimed at 32 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
Turkey
United Kingdom

CHART A-1
COUNTRIES PARTICIPATING IN THE 2016 SURVEY

In this report, when data refers to all of these countries it is labelled 'EUROPE - 32'. Totals for countries that participated in the survey are labelled 'EUROPE - 27'.

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 27 ACE member countries. At least one Member Organisation in each of the 32 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 27 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, a total of 27 278 architects replied.

The response is considered satisfactory for the level of analysis undertaken. The statistical validity of these results is accurate to within + / - 0.6 per cent at the 95 per cent confidence level. The accuracy varies for each individual country and these + / - 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	4.3
Bulgaria	7.9
Croatia	5.1
Cyprus	12.4
Czech Republic	12.7
Denmark	4.5
Estonia	12.8
Finland	4.5
France	3.0
Germany	1.2
Hungary	7.6
Ireland	5.1
Italy	0.8
Lithuania	7.8
Luxembourg	10.1
Malta	14.1
Netherlands	4.4
Poland	6.9
Portugal	3.6
Romania	15.7
Slovakia	7.8
Slovenia	9.0
Spain	5.0
Sweden	3.6
Turkey	3.7
United Kingdom	2.9
2016 EUROPE-27	0.6

* this means we are 95 per cent confident that the results are accurate to within + or - 1 per cent overall, or within + or - xx per cent for each individual country

A2 DEFINITIONS

Architects
Persons who are recognised as Architects under the European Union Professional Qualifications Directive and professionally and academically qualified and generally registered / licensed / certified to practice architecture in the jurisdiction in which residing and who are responsible for advocating the fair and sustainable development, welfare, and cultural expression of society's habitat in terms of space, forms and historical context.

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 of 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.

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

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 asterix, to denote caution when interpreting the findings. We generally avoid referring to these asterixed countries within the text commentary, although all countries are included in the charts and maps.

A3 METHODOLOGICAL NOTES

1. Method for weighting the 'All' figure

The 'EUROPE-27' 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. The raw survey data suggests 2 per cent of the profession is 'retired'. 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. It is also conceivable that the demographics of email addressees held are such that fewer retired architects may have provided their email address to their institute in the first place, so any mailing based on email address alone may not have picked up sufficient numbers of retired architects. For these reasons we suspect the 'not economically active' figure is an under-estimate.

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.