The Architectural Profession in Europe 2014

Contents

I

Foreword 2
Introduction and Summary 3
Key statistics 4

1: ARCHITECTS IN EUROPE
1.1 Numbers 9
1.2 Profile 11
1.3 Employment status 12
1.4 Field of employment 13
1.5 Years qualified 15
1.6 Age Profile 16

2: ARCHITECTURE – THE MARKET
2.1 Construction market 19
2.2 Architectural market 23
2.3 Market by building 25
2.4 Market by client type 27
2.5 Market by service 28
2.6 Future prospects 29

3: ARCHITECTURE – THE PRACTICE
3.1 Profile 31
3.2 Legal formation 34
3.3 Practice revenue 36
3.4 How practices charge 37
3.5 Hourly rates 38

II

COUNTRY PROFILES 69

APPENDIX
Survey methodology & Notes 99

3.6 Profits 40
3.7 Revenue from outside country 41
3.8 Associations 42
3.9 Branch offices 43
3.10 Competitive tenders 44
3.11 Certification work 46

4: ARCHITECTS – THE INDIVIDUAL
4.1 Earnings 48
4.2 Earnings by field of employment 50
4.3 Earnings by age 51
4.4 Earnings by gender 52
4.5 Working in another European country 53
4.6 Main concerns about working in another country 55
4.7 Retirement 56
4.8 Hours worked 58
4.9 Career satisfaction 59
4.10 CPD 64
4.11 Building to nearly zero energy standards 66

Photo credits for front cover:
Architect: Studio 3LHD Damir
Project: Centar Zamet
Place: Rijeka – Croatia

January 2015
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Foreword

Based on responses from 18,000 Architects in 26 European countries, this fourth edition of the Sector Study commissioned by the Architects’ Council of Europe has been complemented with new data on cross-border training and working, making it the most comprehensive and significant report on the state of the architectural profession in Europe.

Since its first edition in 2008, the Study has proved its worth and usefulness in many instances. By supporting our policy positions with statistical evidence, it has contributed to enhancing the credibility of ACE in its dealings with policy-makers at EU and national levels, especially for the modernisation of the Public Procurement and Professional Qualifications Directives. The data contained in this publication also allows ACE Member Organisations, academics and researchers to draw insightful comparisons between the European countries and thus to shed a new light on national situations. It helps all of us to pinpoint long-term trends and to better understand how the profession has been affected and transformed by the economic crisis, or what is now becoming the New Reality. The ACE Sector Study has therefore become an essential reference tool allowing all those interested in the built environment to get an in-depth understanding of the architectural profession and the architectural market.

The 2014 Study shows some encouraging trends and positive perspectives for the Profession. Some of the more negative statistics appear to be behind us – unemployment has fallen, practice revenues have slightly risen, more architects are working full-time, and workloads for the next year are expected to increase. However, these positive developments must not hide the fact that the situation differs greatly from one country to another. A north-south split is still noticeable, and the situation continues to deteriorate in several countries. The market remains at a standstill in southern Europe and underemployment and unemployment remain a major concern for numerous architects.

These contrasting results emphasise the urgent need to take action at all governance levels – EU, national, regional and local, in order to shore up the on-going recovery and improve regulatory frameworks to guarantee that the Profession is able to further produce and deliver good Architecture, for the sake of our wellbeing, our safety, our productivity and ultimately, our future. In this regard, it is vital to invest in education to deliver high quality graduates, to increase the mobility of Architects across the EU and facilitate cross-border service and establishment; to implement public procurement rules based on quality selection criteria and to support renovation of the existing buildings and the Regeneration of our cities.

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

Luciano Lazzari
ACE President
Introduction and Summary

The fourth biennial Sector Study of the architectural profession involved a record high number of Member Organisations; 26 out of the ACE’s 31 member countries took part. A total of 18,000 architects from across Europe completed questionnaires - a massive effort and once again this provides a statistically reliable database of information for this report. Our thanks, as ever, go to Member Organisations and the thousands of individual architects who took the time to participate in this survey.

The research confirms that architecture is a growing profession in Europe: the number of architects in Europe has increased by 6 per cent since 2012. Growth is being pushed by southern European countries. It is becoming a more equal profession: the number of individual architects who took the time to participate in this survey.

Architecture is also a resilient profession: practice revenue and profits for all but one person practices have increased. So have profits. Earnings overall are at a very similar level to those recorded in 2012; slightly lower for Partners and Directors, about the same for Sole Principals and Freelancers, and slightly higher for salaried architects working in private practices, and for architects in the public sector.

All this against an economic background which continues to be frustratingly difficult. The demand for architectural services remains muted, with construction output continuing to fall in several key countries. The latest available statistics show that most of the Eurozone is recording no change, or a decline, in construction output - while most of the growth is limited to countries which are located in the periphery of Europe. Overall, construction output has been flat for the past five years. Our estimate shows the size of the architectural market has fallen by 5 per cent since 2012. Architects are getting a declining share of a stagnant market – the architectural market as a share of construction output has fallen, from 1.1 per cent in the 2008 and 2010 surveys, to 0.9 per cent now. Architectural practices’ client base remains strongly reliant upon private housing, and in particular individual housing. This year there is less commercial work than in 2012, but more public work.

For the first time, we have looked at cross-border training and working. Architecture is an international profession: 18 per cent received at least part of their architectural education in another country from where they work now. As many as 35 per cent have “seriously considered” working in another European country in the last year; although only 5 per cent actually did so.

Allied to stable earnings and rising practice revenues in all but one person practices, architects appear to be weathering this long economic storm. It is encouraging to be able to record that architects are more optimistic this year than in any of the three previous surveys; more architects expect their work to increase in 2015 than decrease, the first time in the history of the Sector Study that this ‘balance’ figure has been positive. Architects in countries around the periphery of Europe are most likely to be positive, whilst negative figures are limited to certain countries within the Eurozone area. But positivity appears to be spreading across much of the profession and across most countries. There are now fewer pessimists in 20 out of 26 countries compared with last time. The improvement in confidence since the last survey appears to be substantial and convincing.
Survey Participation - 2014

26 member organisations

18,000 participants

survey covers 97% of profession

2014

number of member organisations (total=31)

0 5 10 15 20 25 30

participants

non-participants

2014

number of participants

0 5000 10000 15000 20000

2014

per cent architects in Europe

0 20 40 60 80 100

The Architectural Profession in Europe 2014
Demography of the Profession

565,000 architects in Europe

34% aged under 40

39% women

78% working full-time
The Market

€1664 bn
construction output

€14.9 bn
architectural market

53%
architects’ work is private housing

75%
expect rise or no change in workloads next year

The Architectural Profession in Europe 2014
Practice, Income, Satisfaction

74% of practices are one person practices

€29070 average earnings (PPP)

6.9/10 satisfaction rating - choice of career

74% will work as an architect until retired