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ARCHITECTS' COUNCIL OF EUROPE

THE ARCHITECTURAL PROFESSION IN EUROPE 2018 A SECTOR STUDY

WE WANTED TO BE THE SKY



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE



MIRZA & NACEY RESEARCH

THE ARCHITECTURAL PROFESSION IN EUROPE 2018

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FINAL

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

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

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

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

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

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

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

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

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

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



Georg Pendl
ACE President

30 000 architects provided data for the 2018 ACE Sector Study

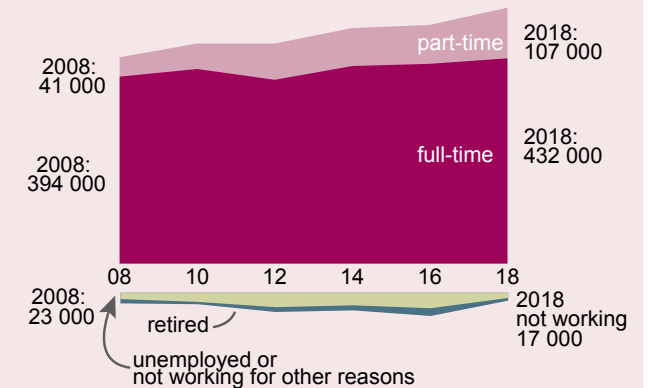
Architecture in Europe is a growing profession
Total number of architects has grown by 24% in 10 years



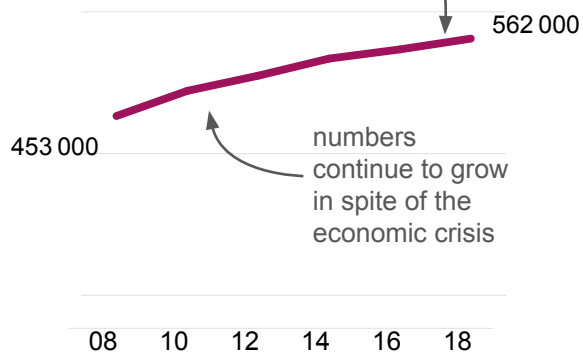
Five countries dominate
Two thirds of Europe's architects are from five countries

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

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



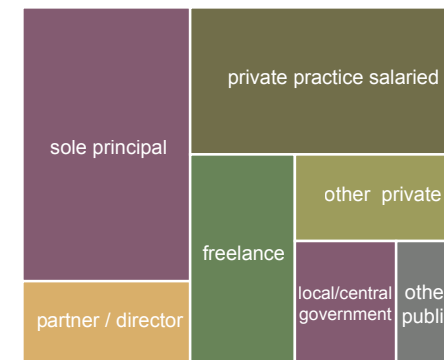
Long-term average increase is 2% per year



562 000

the number of architects in Europe 2018

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



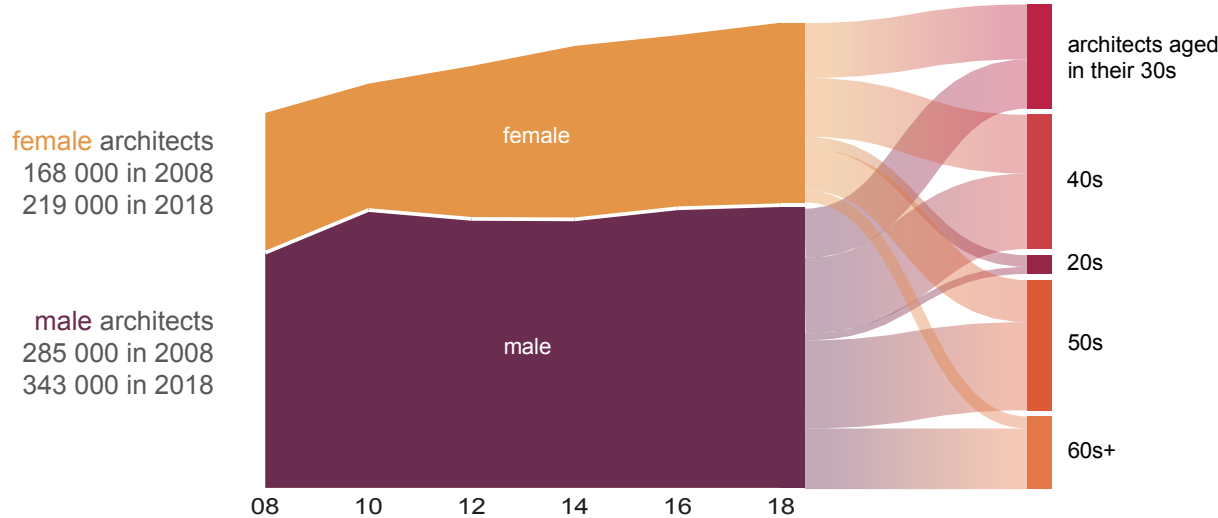


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Female architects are the majority in the younger age groups

53% of architects in their 30s are female, compared with 32% in their 50s.
The profession has the potential to become more equally balanced than it is today

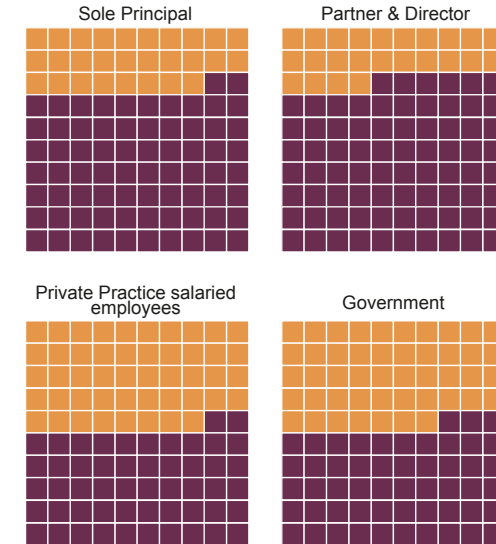
number of architects 2008 to 2018:



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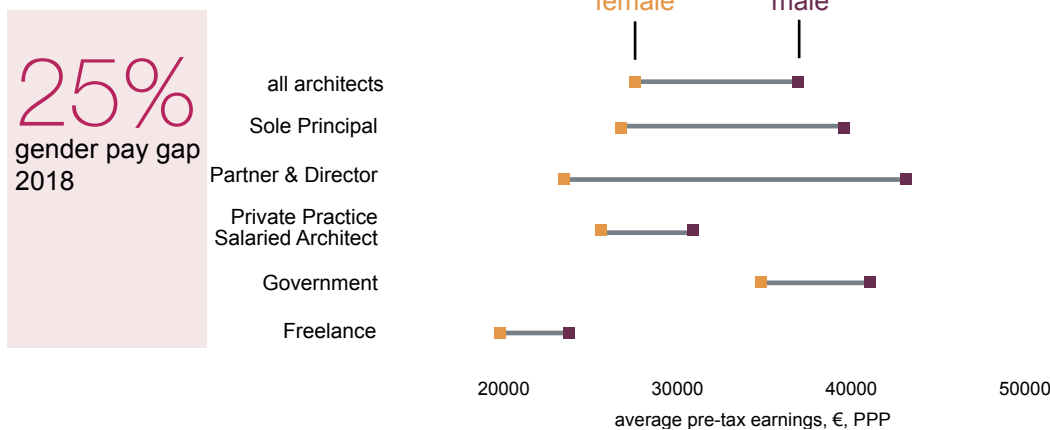
Many more Principals are male

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



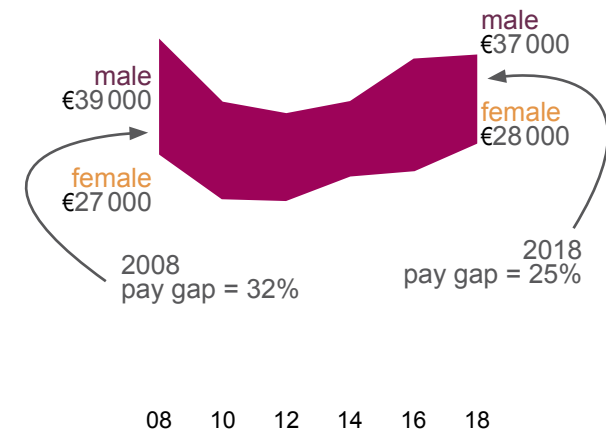
Gender pay gap exists across all employment types

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

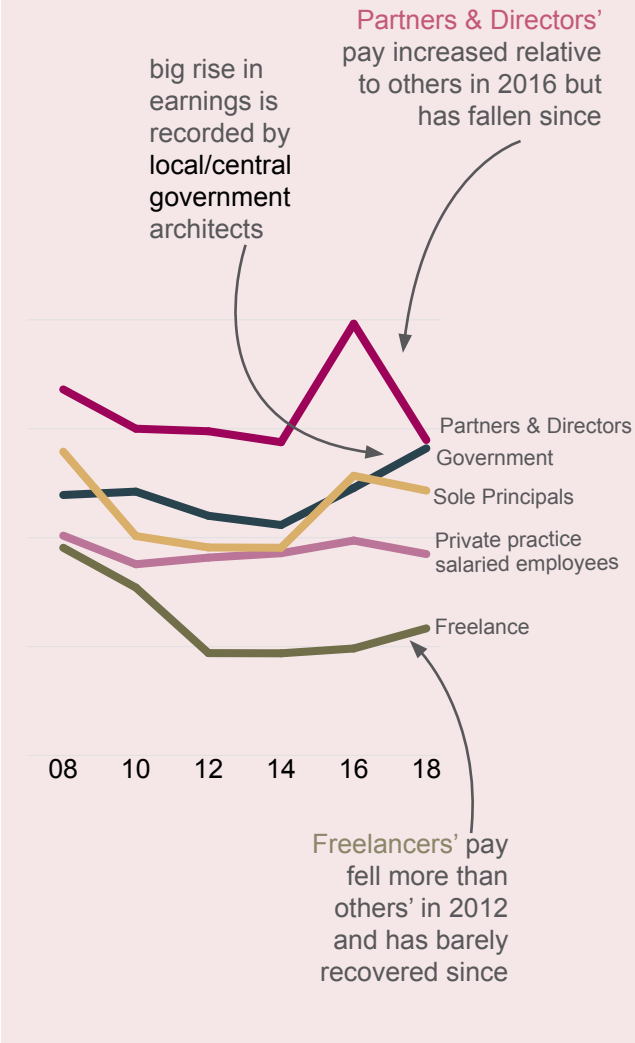


Gender pay gap persists

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



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

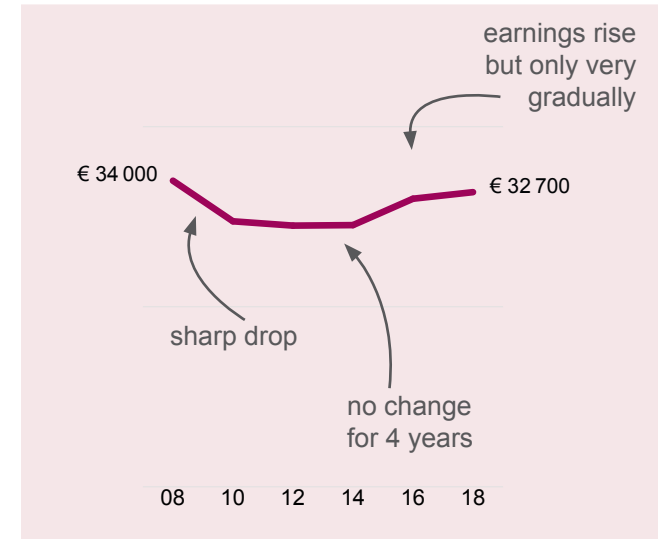


Top five countries for pay
Average earnings for Partners & Directors equalised for purchasing power parity (PPP)

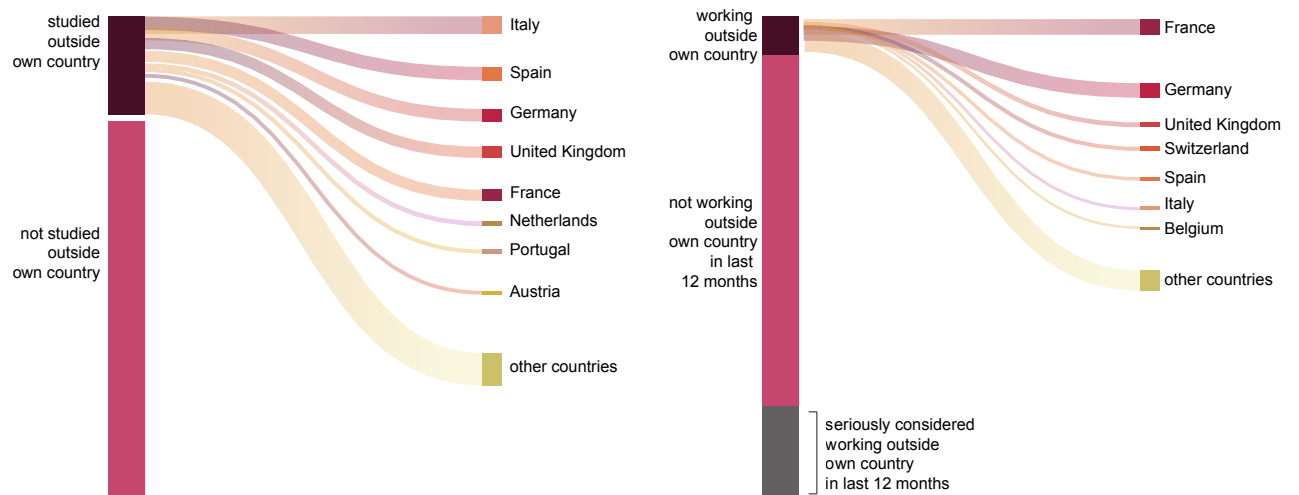
Luxembourg	€ 56 738
Germany	€ 54 286
Norway	€ 46 965
Austria	€ 46 168
Netherlands	€ 44 524

Increase in average earnings since 2016
Earnings remain below 2008 level

2%



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



Market is recovering - slowly

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



Construction market fell by less than architects' market



Top five architectural markets by value

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

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

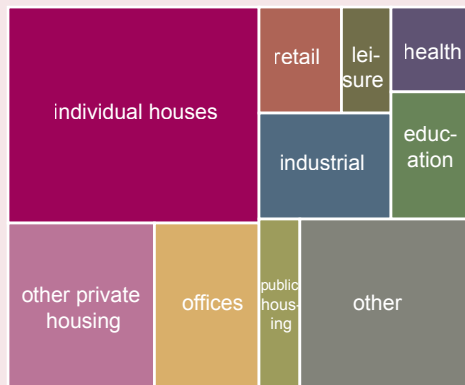
€16400 m

the market for architectural services in Europe 2018

Housing leads the way

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

2010

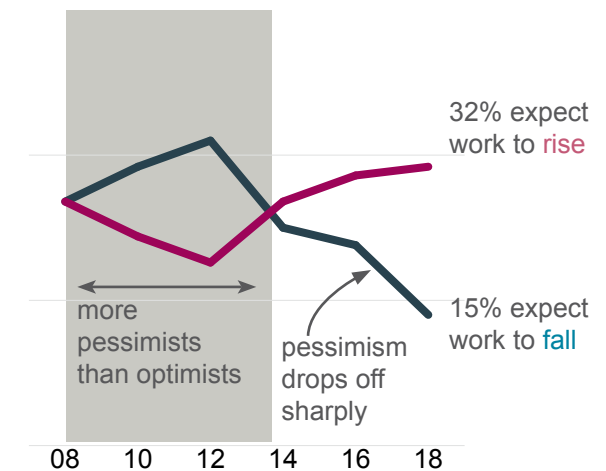


2018



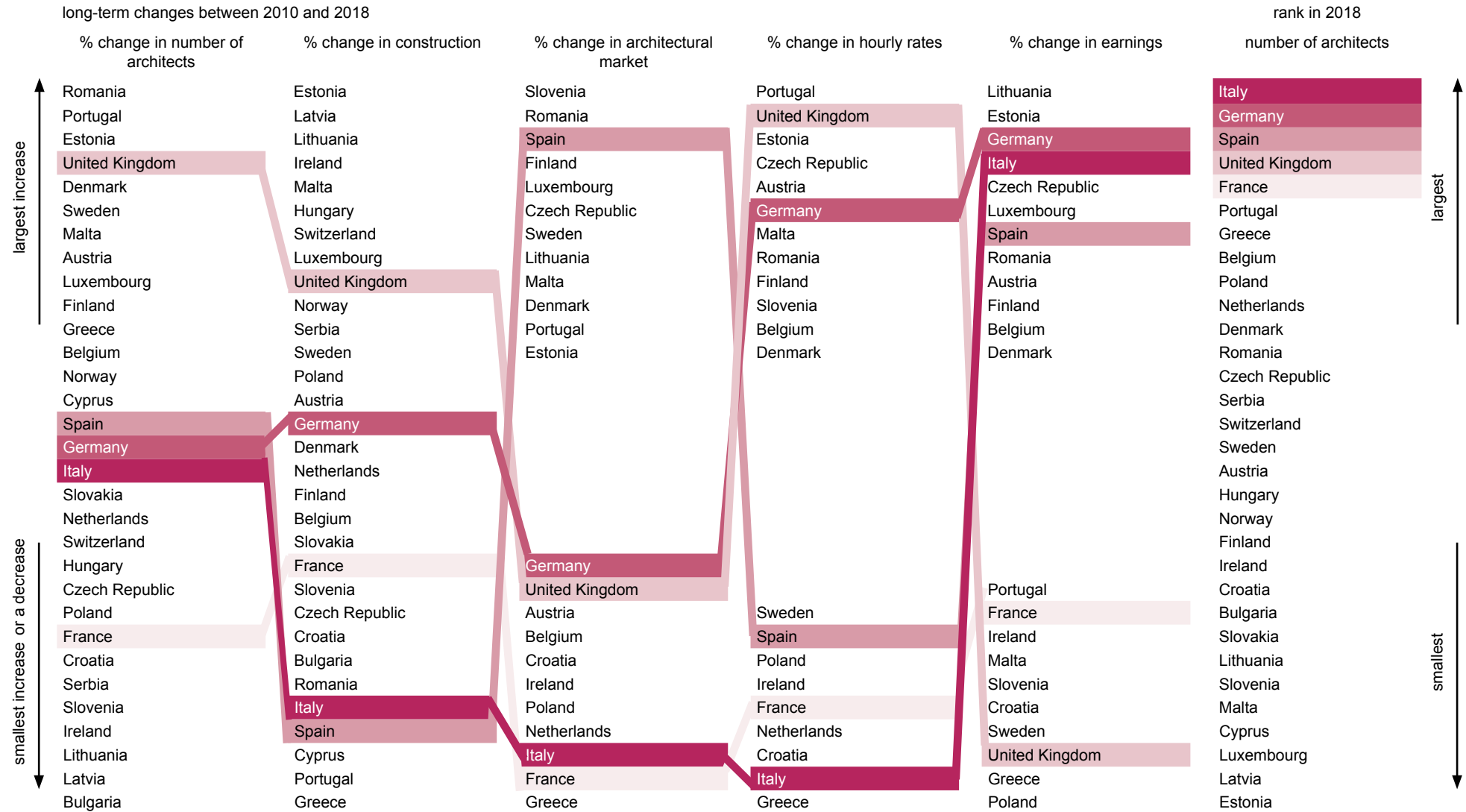
A confident future

Optimists now greatly outweigh pessimists



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

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



Note:

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

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



DEFINITIONS

Architects

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

Architectural students

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

Architectural Staff

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

Architectural Practices

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

Sole Principal

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

Turnover

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

Not Economically Active

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

Freelance Architect

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

Statistical Definitions

Confidence Level

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

Mean

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

Median

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

Quartile

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

