



ARCHITECTS' COUNCIL OF EUROPE

THE ARCHITECTURAL PROFESSION IN EUROPE 2020 A SECTOR STUDY

THE ARCHITECTURAL PROFESSION IN EUROPE 2020

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Architect: K2S and NRT
Photograph: Paula Huotelin

FOREWORD

We are pleased to present the 7th edition of our Sector Study. We have again enjoyed strong participation, by some 25 600 architects from all over Europe. This means, the answers are statistically relevant, and it means this work is seen as important for many of our colleagues. I recall that such studies are a basic starting point for an organisation aspiring to represent the interests of the architects. First of all, we need to know who we are, then we can draw our conclusions to inform our next steps. Again, as in the previous years, we see the profession - by a huge majority - to be made up of micro- and small enterprises. But this doesn't mean that such offices are unable to design relatively large projects: a fact that is not so well known, but actually the reality. We need to underline this, especially with regard to public procurement issues, where we face a tendency to exclude smaller entities.

I would like to draw your attention to the launch of our Observatory. Based on the biennial Sector Study, you can browse through this database in an easy and even playful way to find out facts, statistics, basic as well as detailed information about the European architects. This is a unique tool offered by the profession at European level. I have experienced very positive feedback and great interest whenever I have presented the Sector Studies at various events. I hope we will get even better feedback for this Observatory.

One significant new issue is the New European Bauhaus initiative and I would like to draw your attention to the State of the Union speech of the European Commission President Ursula Van der Leyen on 16 September 2020. For the first time,

architects are mentioned as a potential driving force within the Green Deal and in the field of the built environment and its renovation. This marks a remarkable step for us and we are looking forward to the next phase.

Besides sending a letter to the European Commission President offering our readiness to contribute, as a representative organisation, I have also written to many potential partners, organisations and stakeholders to initiate a joint effort to use this opportunity for all creative professions. Our pro-activity in this has led to the initiation of the New European Bauhaus Collective, currently consisting of 11 European organisations representing colleagues from various fields.



Georg Pendl
ACE President

Background

Europe's architects during the pandemic

The Covid-19 crisis is the cognitive filter through which this year's survey results will inevitably be viewed. The social and economic costs, the disruption and the continuing uncertainty each impact on this year's results. The Covid-19 crisis has affected how architects work, where they work and indeed whether they work at all.

This year's survey spans both the periods before and during the Covid-19 crisis. Practices' financial data generally refer to the 12 months before Covid-19; while business sentiment is recorded during or after the first lockdown. Any major effects on the level of part-time working or unemployment are unlikely to have been recorded in this year's survey so the results show only the earliest effects of the pandemic on the profession. There are new questions in this year's survey that show how the profession has adapted to the newly evolving digital environment and how the profession is creating sustainable architecture.

560 000 architects in Europe

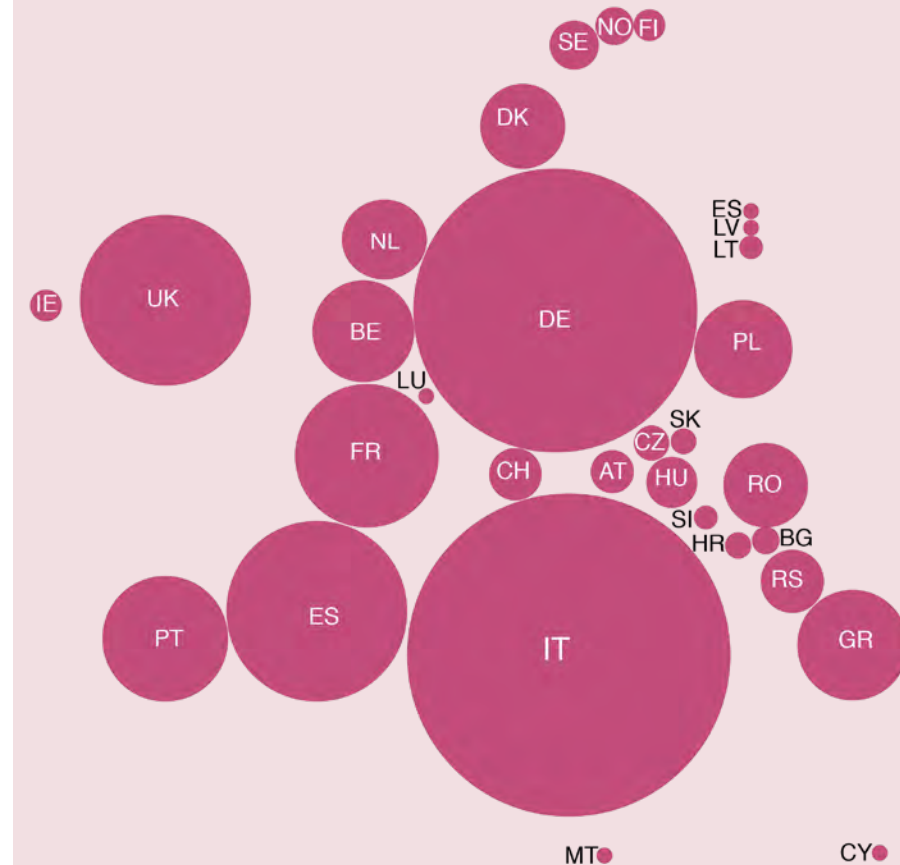
Numbers have stopped growing

Total number of architects grew by 14% between 2008 and 2018 but remains unchanged since 2018.

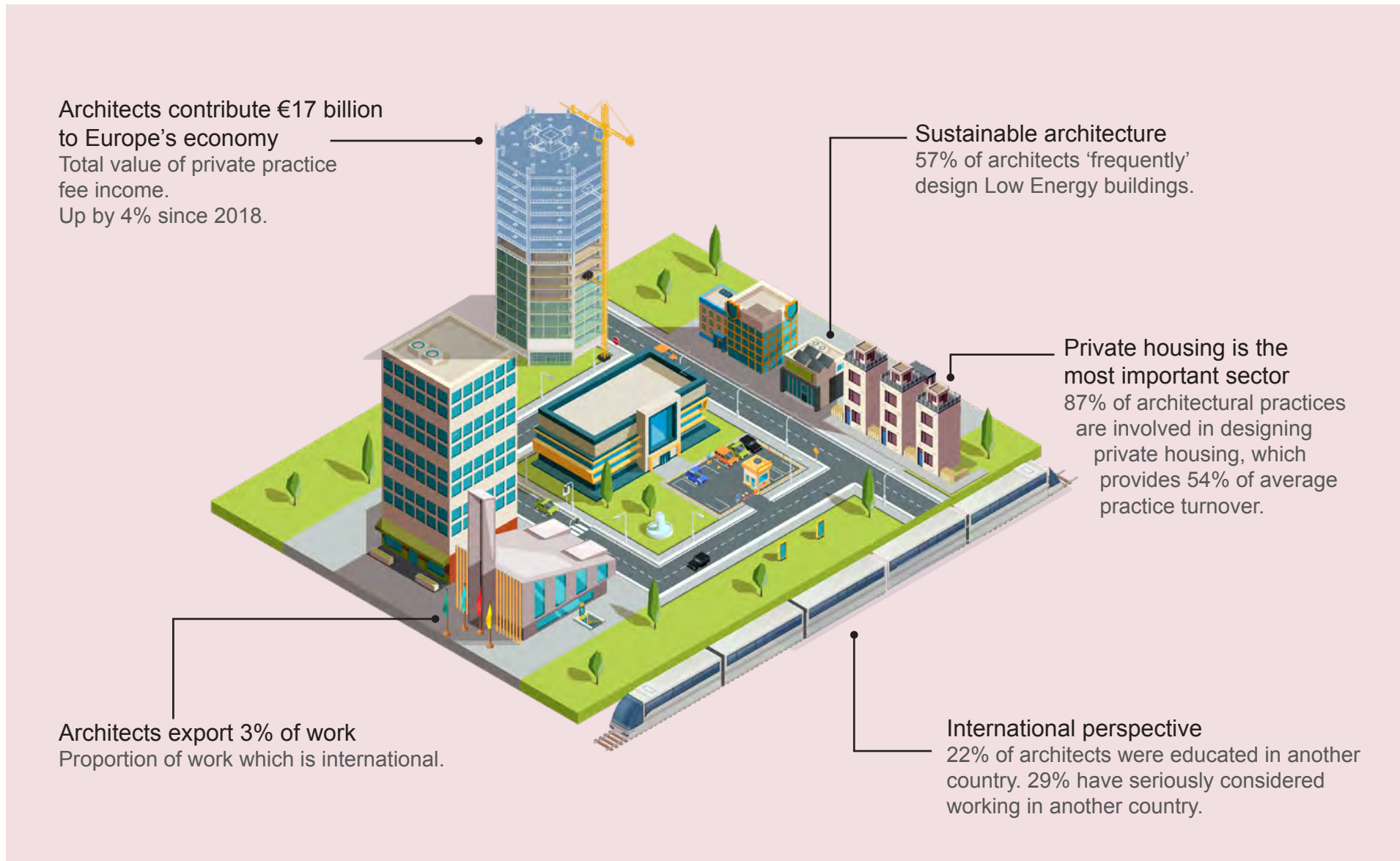


Five countries dominate

Two thirds of Europe's architects are from five countries.

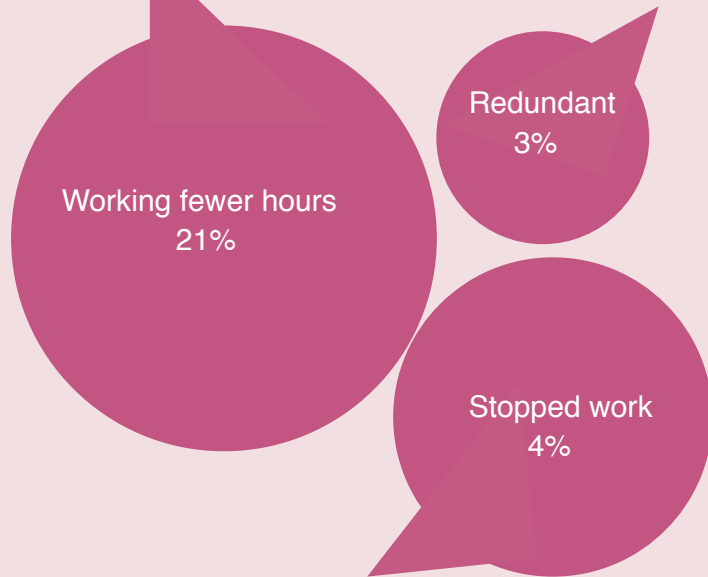


Architects contribute €17 billion to Europe's economy

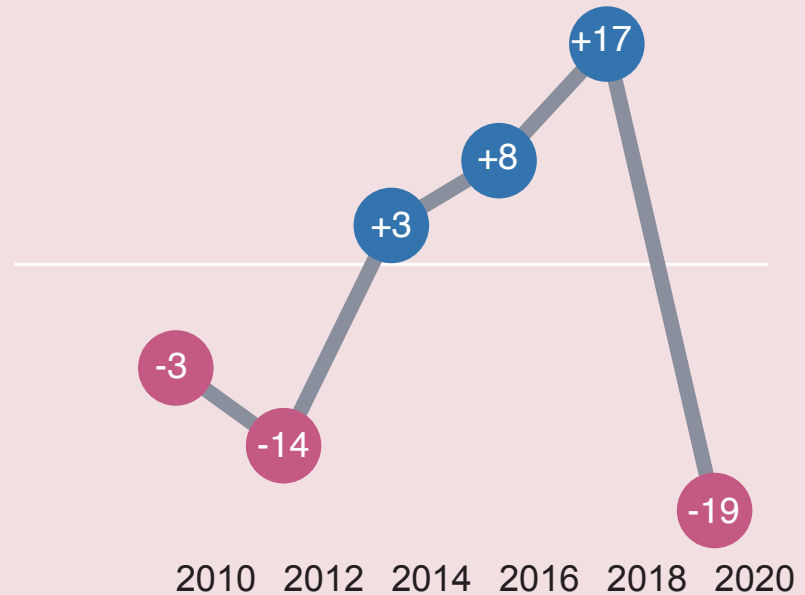


Covid-19 has changed how, where and whether architects work

Practices are temporarily cutting back
The pandemic has disrupted employment for a significant number of private practice staff.



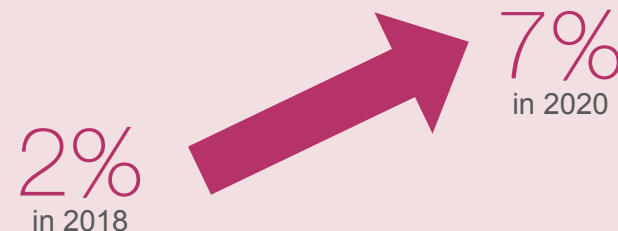
Sentiment has fallen
More architects expect workloads to fall in next 12 months.



Fewer architects are working full-time
5% of those normally working full-time are now working part-time due to Covid-19.

75%
working full-time in 2020

More architects are unemployed/not working
Big jump from 2% in 2018 to 7% now. Some architects are unemployed due to Covid-19 but the underlying rate of unemployment was rising before the pandemic hit.

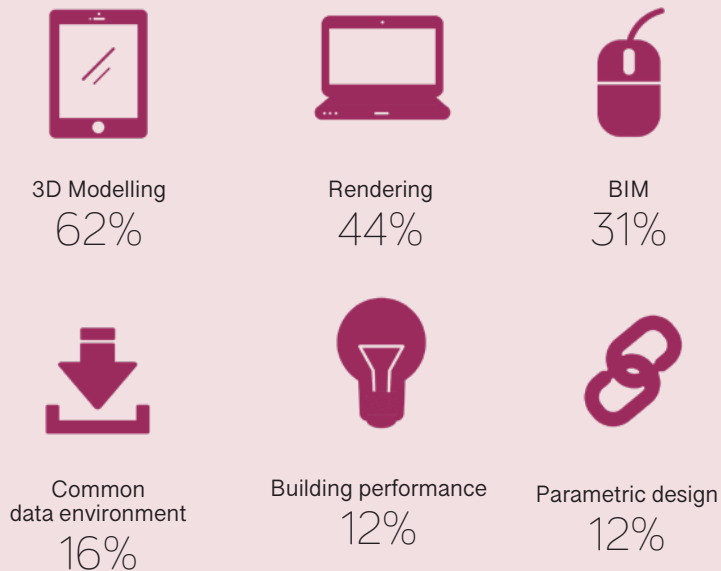


Architects are well placed for the recovery

Enthusiastic adoption of Digitalisation tools

Architects are much more likely to use new tools out of personal or business interest than due to client or regulatory requirements.

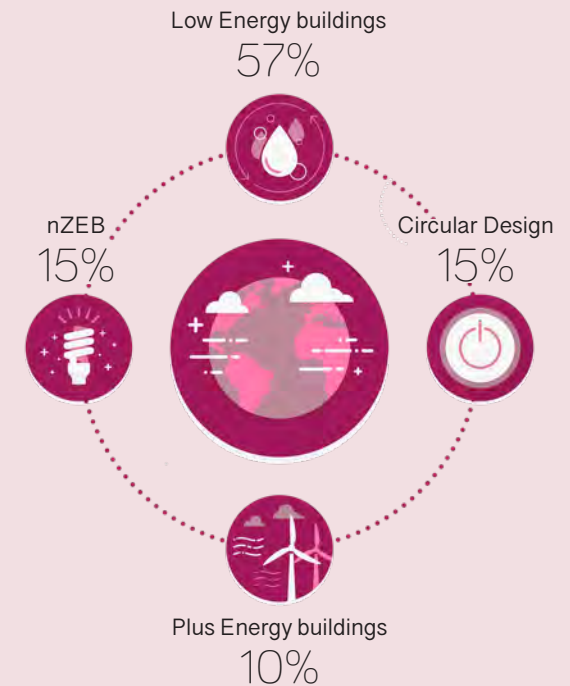
Architects have shown themselves to be extremely willing to learn, more than half of those using each tool are self-taught.



Proportion of architects 'frequently' using these digital tools

Sustainable Architecture is embedded in architects' daily behaviour

A majority of architects are creating sustainable architecture through Low Energy buildings and other measures.



Proportion of architects 'frequently' using these concepts

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.

HOW THE ACE SECTOR STUDY IS PRODUCED

Survey Framework

Design questions, identify targets, review questions and method.

Data Selection

Member Organisations translate questionnaire and invite their architect members to participate in the survey.

Data Collection

Architects across Europe complete the questionnaire.

Analysis & Report

Returned data is cleaned. Data analysis including weighting. Report writing.

Publishing

Feedback from Member Organisations. Report published. ACE Observatory updated.

THE ACE OBSERVATORY

The Architectural profession in Europe in 'one click'

All the data presented in this report is available online. The ACE Observatory provides a single entry point through which users can search, access and compare a multitude of statistical information regarding European Architects, the architectural market and architectural practices taken from the ACE Sector Studies since 2010.

The ACE Observatory has been divided into 3 sections : Architects, Practices and Market. The homepage is an overview of the latest data for Europe.

Each section includes multiple topics. To view more details about each topic click on 'more'.

All data can be interrogated by individual country as well as for the whole of Europe. Some practice data can be viewed by size of practice, architect demographic data can be examined by gender and age.

Main elements of the ACE Observatory

Home page
Provides a quick overview of all the data across Europe for all topics covered by the Sector Study.



Topic page

Select to view any country from the drop-down

View data for different years

Some topics such as Salaries have further filters to allow selection of data by age gender etc

View and download the data as tables



www.aceobservatory.com

11 ARCHITECTS IN EUROPE



Kirkkonummi Library, Finland
Architect: JKMMArchitects
Photograph: Maurizio Tami

CHAPTER 1 - SUMMARY



560 000

Total number of architects



42%

Female architects



34%

Aged under 40



75%

Employed full-time



29%

Employees in private practice



42%

Partners, Directors, Sole Principals

1.1 THE NUMBER OF ARCHITECTS IN EUROPE

There are an estimated 559 070 architects in Europe-31. Italy has the largest number of architects with 152,000 architects. The second highest number of architects is in Germany which has 118,000 architects.

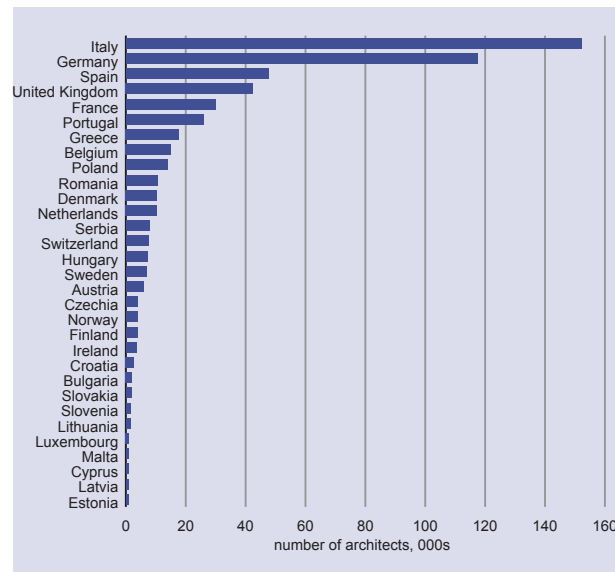
Three other countries with high numbers of architects are Spain (48,000), the United Kingdom (43,000) and France (30,000). Between them, these five countries are home to 70 per cent of Europe's architects.

Across Europe there is 1.0 architect for every 1,000 people in the population. This ratio is more than twice as high as the European average in Italy and Portugal but less than half in Poland, Latvia, France, Czechia, Slovakia and Bulgaria.

has fallen back; elsewhere the number is unchanged; while in some central and northern European countries the number of architects continues to grow – such as Germany, Austria, Luxembourg, the United Kingdom and Ireland.

Since this survey started in 2008, the number of architects in Europe has grown consistently – until this year. The 2020 figure is about the same as the previous (2018) survey figure. The number of architects in some southern European countries – notably Italy and Spain –

CHART 1-1
ESTIMATED NUMBER OF ARCHITECTS 2020



Base: all 31 European countries

General notes for all tables and charts:
 EUROPE-31 = all ACE member countries.
 EUROPE-26 = all participants in the 2020 survey.
 The total Europe-26 figure is weighted to reflect the total architectural population in all participating countries; weighting process described in Appendix.
 Some countries have small samples these are marked *.
 Germany survey figures throughout have been provided by the BAK which included the ACE survey questions in its own survey.

CHART 1-2
NUMBER OF ARCHITECTS PER 1000 POPULATION

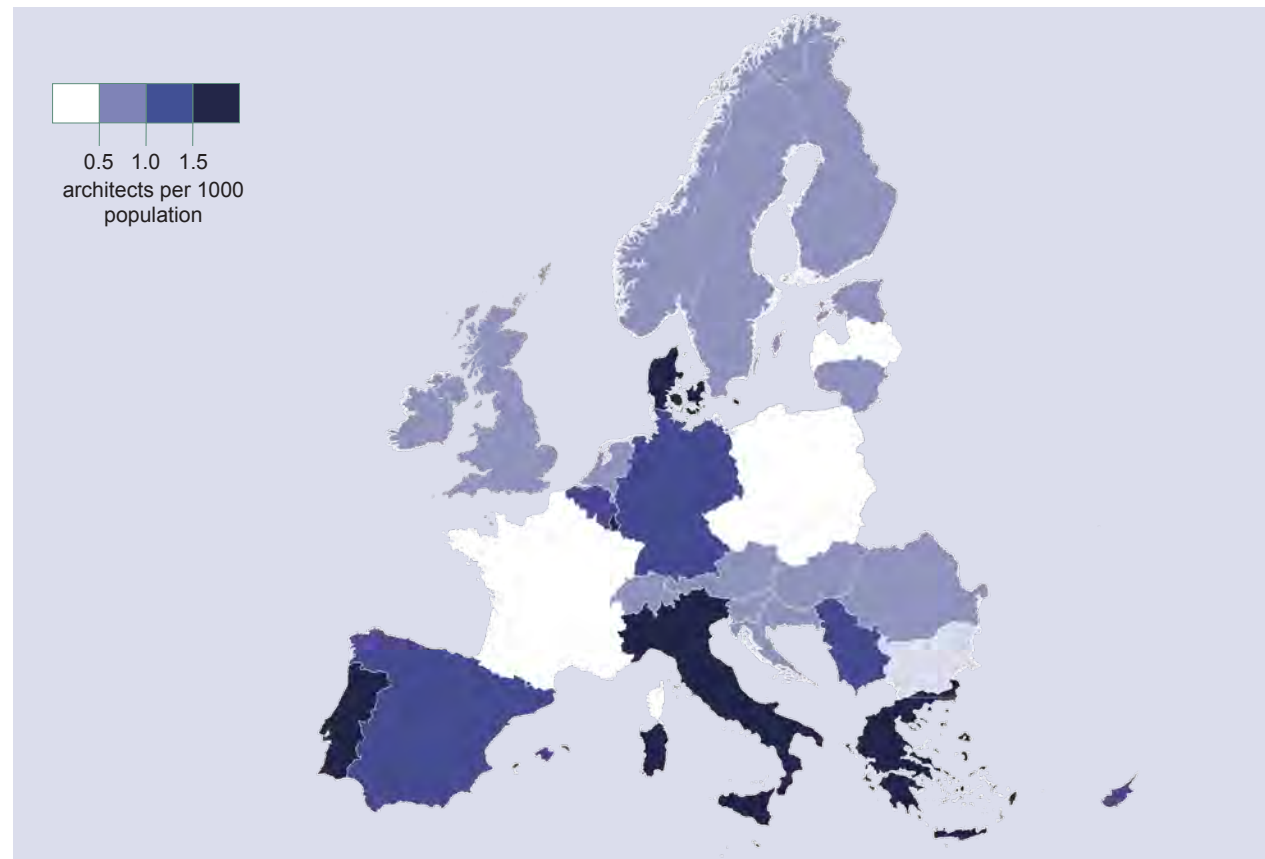


TABLE 1-1
ESTIMATED NUMBER OF ARCHITECTS IN EACH COUNTRY AND NUMBER OF ARCHITECTS
PER 1000 POPULATION

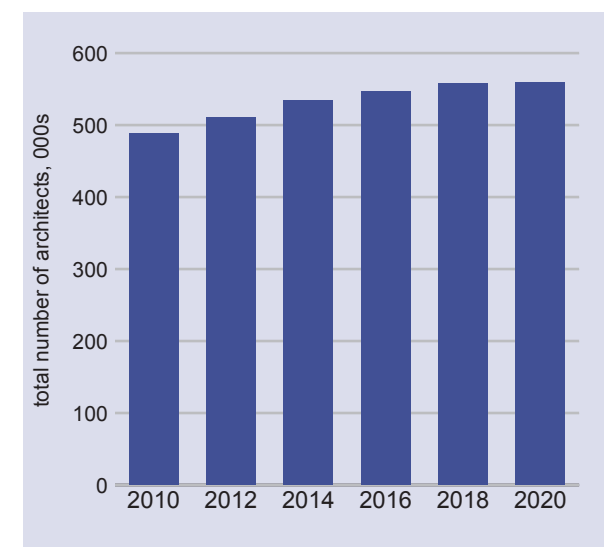
	number of architects	population	architects per 1000 population
Austria	5800	8901064	0.7
Belgium	15 100	11 549 888	1.3
Bulgaria	2 100	6 951 482	0.3
Croatia	2 700	4 058 165	0.7
Cyprus	950	888 005	1.1
Czechia	4 000	10 693 939	0.4
Denmark	10 400	5 822 763	1.8
Estonia	800	1 328 976	0.6
Finland	3 800	5 525 292	0.7
France	30 000	67 098 824	0.4
Germany	117 500	83 166 711	1.4
Greece	17 800	10 709 739	1.7
Hungary	7 300	9 769 526	0.7
Ireland	3 500	4 963 839	0.7
Italy	152 200	60 244 639	2.5
Latvia	810	1 907 675	0.4
Lithuania	1 450	2 794 090	0.5
Luxembourg	1 100	626 108	1.8
Malta	1 000	514 564	1.9
Netherlands	10 400	17 407 585	0.6
Norway	4 000	5 367 580	0.7
Poland	14 000	37 958 138	0.4
Portugal	26 000	10 295 909	2.5
Romania	10 500	19 317 984	0.5
Serbia	8 000	6 926 705	1.2
Slovakia	1 800	5 457 873	0.3
Slovenia	1 460	2 095 861	0.7
Spain	47 600	47 329 981	1.0
Sweden	7 000	10 327 589	0.7
Switzerland	7 500	8 606 033	0.9
United Kingdom	42 500	67 025 542	0.6
EUROPE - 31 - 2020	559 070	535 632 069	1.0
EUROPE - 31 - 2018	557 700	533 427 181	1.0
EUROPE - 31 - 2016	547 100	530 331 562	1.0
EUROPE - 31 - 2014	534 100	527 331 308	1.0
EUROPE - 31 - 2012	509 930	526 727 609	1.0
EUROPE - 31 - 2010	488 500	519 521 581	0.9

Population source: Eurostat population as at 1 January 2020
copyright (c) Eurostat

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

Table 1-1 Base: all 31 European countries

CHART 1-3
CHANGE IN ESTIMATED NUMBER OF
ARCHITECTS IN EUROPE-31 2010 TO 2020



Base: all 31 European countries

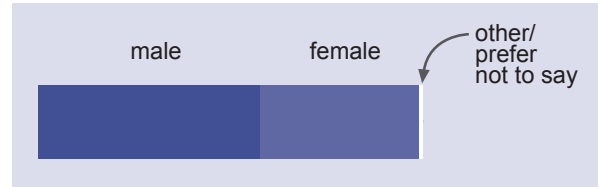
1.2 PROFILE OF ARCHITECTS

TABLE 1-2
GENDER OF ARCHITECTS ANALYSED BY COUNTRY

per cent	gender of architects		
	male	female	other/prefer not to say
Austria	81	19	1
Belgium*	55	45	0
Croatia	38	62	0
Czechia	71	29	0
Denmark	49	51	0
Estonia*	73	27	0
Finland	46	53	1
France	60	40	0
Germany**	66	34	0
Greece	43	57	1
Hungary*	71	29	0
Ireland	62	37	1
Italy	56	44	0
Lithuania*	64	36	0
Luxembourg	68	31	1
Netherlands*	70	30	0
Norway	55	44	1
Poland*	42	58	0
Portugal	54	46	0
Romania	56	44	1
Serbia*	33	67	0
Slovakia	80	20	1
Slovenia	46	54	0
Spain	66	34	0
Sweden	41	58	1
United Kingdom	67	32	1
2020 EUROPE-26***	58	42	1
2018 EUROPE-26***	61	39	n/a
2016 EUROPE-27***	62	38	n/a
2014 EUROPE-26***	61	39	n/a
2012 EUR-25 ***	64	36	n/a
2010 EUR- 23 ***	69	31	n/a

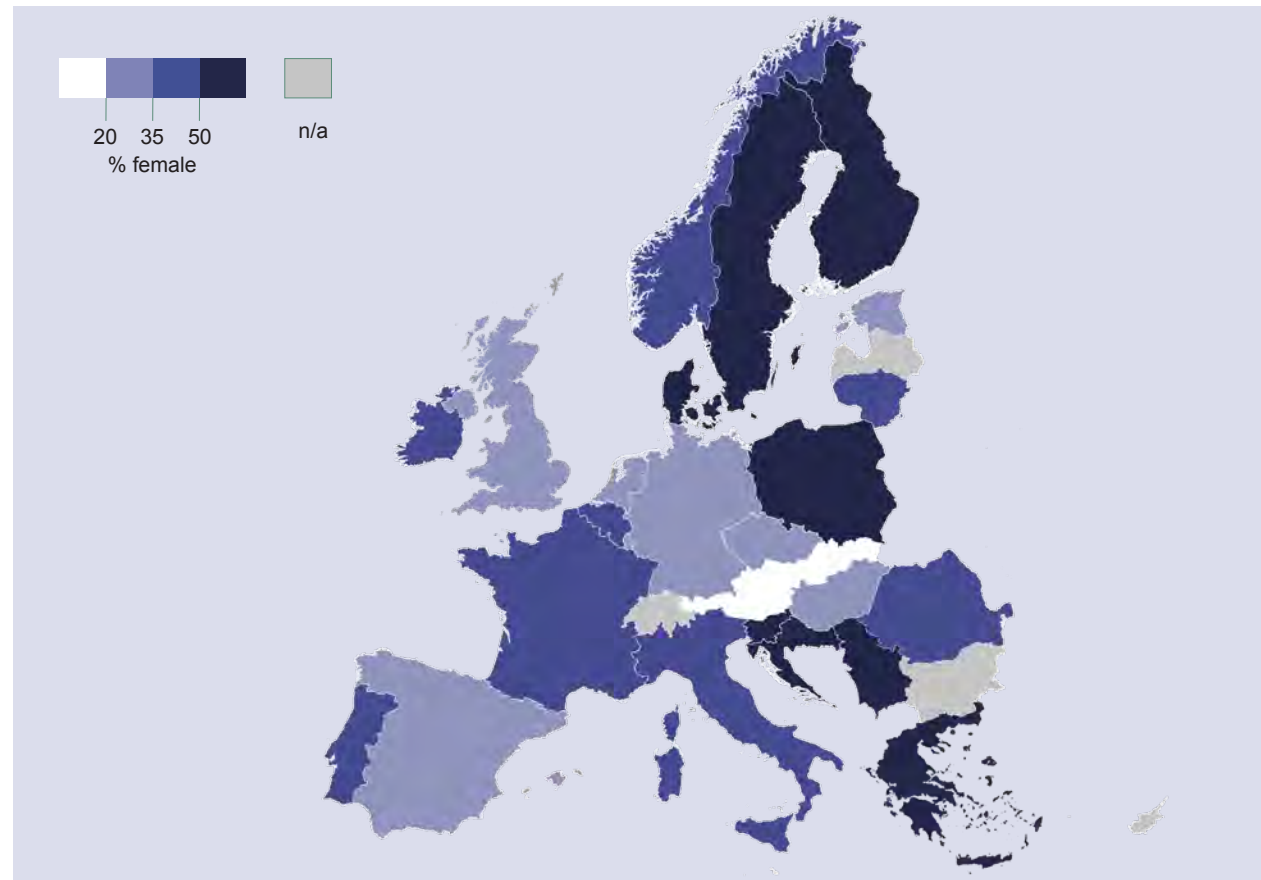
* caution - small sample. ** Germany figures provided by BAK
*** weighted to reflect the total architectural population in all participating countries; weighting process described in Appendix

CHART 1-4
GENDER SPLIT ALL RESPONDING ARCHITECTS



A majority of the profession is still male, but the profession is becoming more balanced. The proportion of female architects has increased from 31 per cent in 2010 to 42 per cent now. A majority of architects are female in Serbia, Croatia, Sweden, Finland, Greece, Denmark and Slovenia. A very small proportion, about 1 per cent, of architects describe themselves as non-binary or prefer not to say. In no country does this proportion exceed 1 per cent.

CHART 1-5
PROPORTION OF FEMALE ARCHITECTS



1.3 EMPLOYMENT STATUS

TABLE 1-3
EMPLOYMENT STATUS OF ARCHITECTS ANALYSED BY COUNTRY

per cent	working full-time	working part-time		not working		retired
		due to Covid-19	other reasons	due to Covid-19	other reasons	
Austria	73	7	16	1	1	2
Belgium*	86	5	9	1	0	0
Croatia	82	4	7	1	3	4
Czechia	75	3	11	0	1	10
Denmark	81	1	16	1	1	1
Estonia*	n/a	n/a	n/a	n/a	n/a	n/a
Finland	90	2	5	0	1	1
France	79	6	8	1	2	3
Germany**	76	12	n/a	4	n/a	n/a
Greece	78	4	8	5	4	2
Hungary*	61	0	5	2	32	0
Ireland	79	6	9	3	2	1
Italy	70	6	13	3	6	3
Lithuania*	64	14	14	0	7	0
Luxembourg	79	11	8	1	0	1
Netherlands*	60	6	27	0	6	0
Norway	80	4	7	1	2	7
Poland*	87	4	6	2	1	0
Portugal	79	6	6	2	6	1
Romania	79	7	6	2	3	2
Serbia*	93	0	7	0	0	0
Slovakia	74	6	8	1	1	9
Slovenia	88	1	8	0	1	1
Spain	68	12	11	4	6	1
Sweden	71	10	6	4	8	2
United Kingdom	66	8	13	3	4	6
2020 EUROPE-26 ***	75	5	11	2	5	2
2018 EUROPE-26 ***	77	n/a	19	n/a	2	1
2016 EUROPE-27 ***	77	n/a	15	n/a	6	3
2014 EUROPE-26 ***	78	n/a	15	n/a	5	2
2012 EUROPE-25 ***	76	n/a	15	n/a	6	2
2010 EUROPE-23 ***	84	n/a	11	n/a	4	1

* caution - small sample

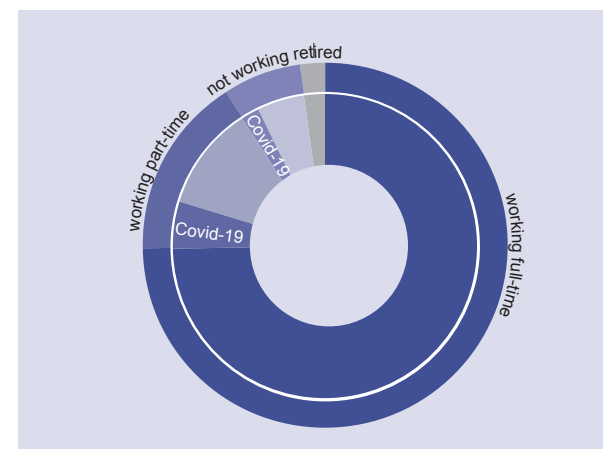
** Germany figures provided by BAK

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

Three quarters of architects work full-time. Fewer architects are working full-time this year than previously. This is almost certainly due to the pandemic. Sixteen per cent of architects are working part-time while 7 per cent are unemployed or not working for other reasons such as caring responsibilities.

However, around one third of architects working part-time and not working are doing so as a result of the Covid-19 pandemic. The highest proportion of architects who are working part-time as a result of the pandemic are in Spain, Luxembourg, Sweden and Lithuania (small sample size).

CHART 1-6
EMPLOYMENT STATUS OF ARCHITECTS



1.4 FIELD OF EMPLOYMENT

Thirty three per cent of architects describe themselves as Sole Principals, making this the largest employment group in the profession. In some countries - such as France, Austria, Luxembourg, Greece or Slovakia, more than 50 per cent of the profession are Sole Principals. Nine per cent of architects are Partners & Directors, so along with Sole Principals, 42 per cent of architects run their own practices and businesses.

Architects working in private practice as Associates or salaried architects make up 29 per cent of the profession. The highest

proportion of architects working as salaried staff or Associates in private practice can be found in Poland, Croatia, Norway and Sweden.

Seven per cent of architects describe themselves as Freelance, with significant numbers in Belgium, Lithuania, Czechia, Spain and Portugal.

The public sector employs 13 per cent of Europe's architects. It is the largest employer of architects in Denmark and Finland.

CHART 1-7
FIELD OF EMPLOYMENT

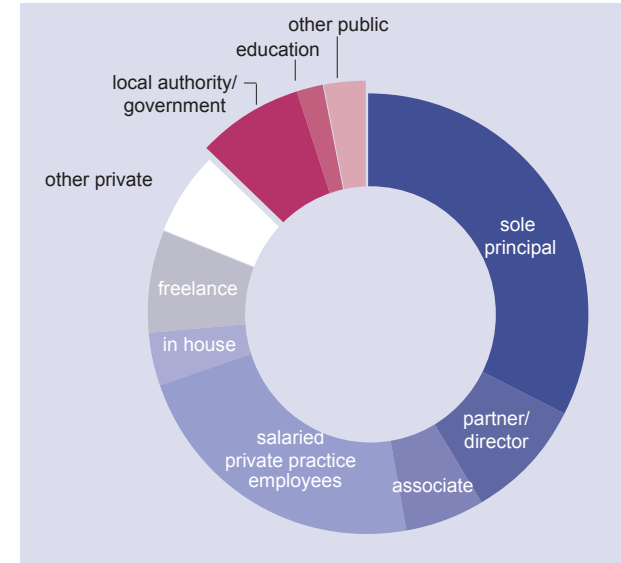


CHART 1-8
MAIN EMPLOYMENT FIELD BY COUNTRY

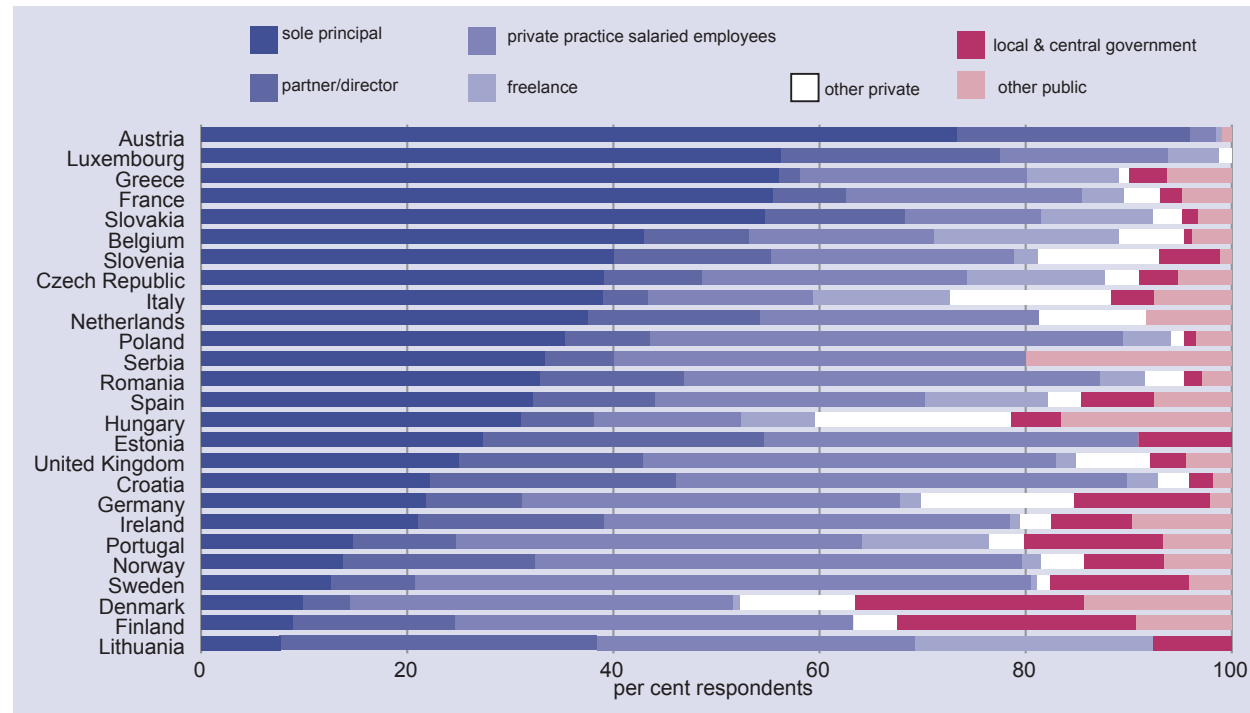


TABLE 1-4
ARCHITECTS' FIELD OF EMPLOYMENT BY COUNTRY

per cent	sole principal	partner director	associate	private practice salaried employees	in-house	agency **	freelance/short-term contract	other private	local authority	central govt	education	other public
Austria	73	23	0	3	0	0	1	0	0	0	1	1
Belgium*	43	10	6	12	0	0	18	6	1	2	0	2
Croatia	22	24	6	38	0	0	3	3	2	1	1	1
Czechia	39	10	10	16	0	0	13	3	4	0	2	3
Denmark	10	5	3	35	1	0	1	10	22	3	8	4
Estonia*	27	27	18	18	0	0	0	0	9	0	0	0
Finland	9	16	3	36	2	0	0	2	23	1	4	5
France	55	7	14	9	0	0	4	4	2	0	1	4
Germany	22	9	0	37	13	0	2	1	13	1	0	1
Greece	56	2	6	16	0	0	9	1	4	3	2	2
Hungary*	31	7	7	7	2	0	7	17	5	5	2	10
Ireland	21	18	11	29	1	0	1	2	8	6	3	2
Italy	39	4	7	9	2	0	13	13	4	1	2	4
Lithuania*	8	31	8	23	0	0	23	0	8	0	0	0
Luxembourg	56	21	15	1	0	0	5	1	0	0	0	0
Netherlands*	38	17	8	19	0	0	0	10	0	2	4	2
Norway	14	19	9	38	1	0	2	4	8	2	1	3
Poland*	35	8	5	41	1	0	5	0	1	1	1	1
Portugal	15	10	4	36	1	0	12	3	13	1	2	3
Romania	33	14	6	34	0	0	4	3	2	0	2	1
Serbia*	33	7	0	40	0	0	0	0	0	13	7	0
Slovakia	55	14	8	5	1	0	11	2	2	0	2	1
Slovenia	40	15	4	20	6	0	2	6	6	0	0	1
Spain	32	12	6	21	1	0	12	2	7	0	2	6
Sweden	13	8	5	55	0	0	1	1	13	3	1	1
United Kingdom	25	18	11	29	1	0	2	6	3	0	3	1
2020 EUROPE-26	33	9	6	23	4	0	7	6	7	1	2	3
2018 EUROPE-26	29	9	5	20	4	0	14	5	7	1	2	4
2016 EUROPE-27	26	8	6	16	1	10	15	5	6	1	3	3
2014 EUROPE-26	29	9	7	20	2	7	8	4	7	1	2	3
2012 EUROPE-25	32	11	7	16	2	8	10	5	5	1	1	3
2010 EUROPE-23	39	12	6	16	1	4	11	4	3	1	2	2

* caution - small sample

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

1.5 YEARS QUALIFIED AS AN ARCHITECT

There is a wealth of experience within the profession. Despite many more young architects emerging in recent years, the experience profile has changed little over the past ten years.

Over a quarter of architects have at least 25 years' post-qualification experience; more than one half have at least 15 years of experience. Just 16 per cent of architects have been qualified for 5 years or less.

More than half of architects in countries including Denmark, Finland, Ireland, Lithuania, Netherlands, Slovakia and the United Kingdom have 20 years or more experience. Countries with the largest proportion of architects with less experience include Portugal, Romania and Spain.

CHART 1-9
NUMBER OF YEARS ARCHITECTS
HAVE BEEN QUALIFIED

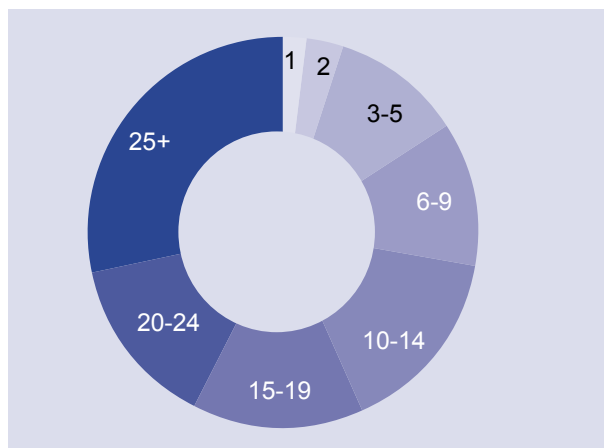


TABLE 1-5
NUMBER OF YEARS QUALIFIED AS AN ARCHITECT ANALYSED BY COUNTRY

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	4	4	9	9	18	14	15	28
Belgium*	5	5	13	15	13	9	9	30
Croatia	0	1	14	19	16	13	8	31
Czechia	0	0	5	12	20	16	11	36
Denmark	3	6	9	9	10	10	14	38
Estonia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	0	3	6	9	14	13	18	37
France	4	3	10	11	17	11	14	31
Germany	2	1	6	10	15	17	16	32
Greece	3	3	11	16	19	13	8	28
Hungary*	0	0	10	0	5	7	7	71
Ireland	1	0	8	14	14	10	16	37
Italy	1	3	13	12	16	14	14	25
Lithuania*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg	4	4	1	9	16	23	20	24
Netherlands*	4	4	4	9	4	13	19	43
Norway	3	2	10	8	13	18	16	31
Poland*	5	11	19	25	13	8	11	9
Portugal	3	6	16	14	18	14	13	16
Romania	1	1	20	23	16	15	8	16
Serbia*	0	7	7	7	33	20	13	13
Slovakia	0	1	1	7	17	14	19	41
Slovenia	1	2	7	5	25	19	21	20
Spain	4	7	20	12	15	11	13	18
Sweden	2	3	13	12	15	16	11	27
United Kingdom	4	3	9	9	9	11	10	45
2020 EUR-26	2	3	11	12	15	14	14	28
2018 EUR-26	3	3	9	11	18	17	12	28
2016 EUR-27	3	4	10	13	19	14	10	27
2014 EUR-26	3	3	9	15	19	14	12	27
2012 EUR-25	3	4	12	16	19	11	11	24
2010 EUR-23	3	5	16	14	12	9	12	28

* caution - small sample

1.6 AGE PROFILE OF ARCHITECTS

The age profile of the profession has changed very little during the last ten years. There are similar numbers of architects in each five year age group between ages 30 and 54.

Countries with the youngest populations of architects include Poland, Romania, Portugal, Spain, Serbia and Belgium (although some of these countries have small sample sizes).

CHART 1-10
AGE PROFILE OF ARCHITECTS

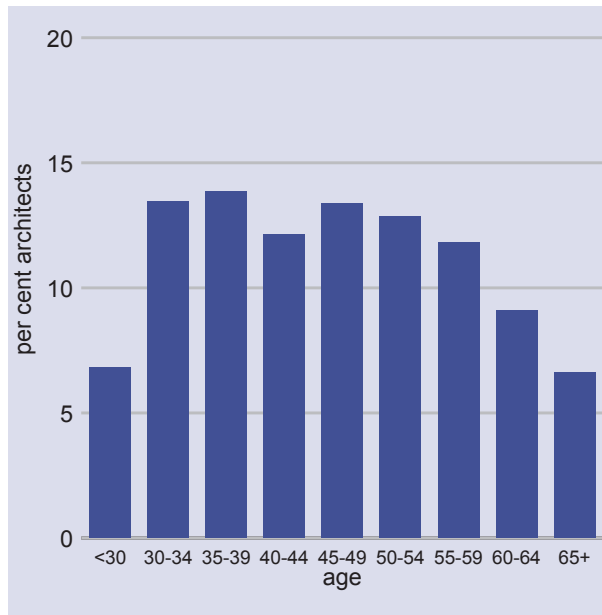


CHART 1-11
PROPORTION OF ARCHITECTS AGED UNDER 40

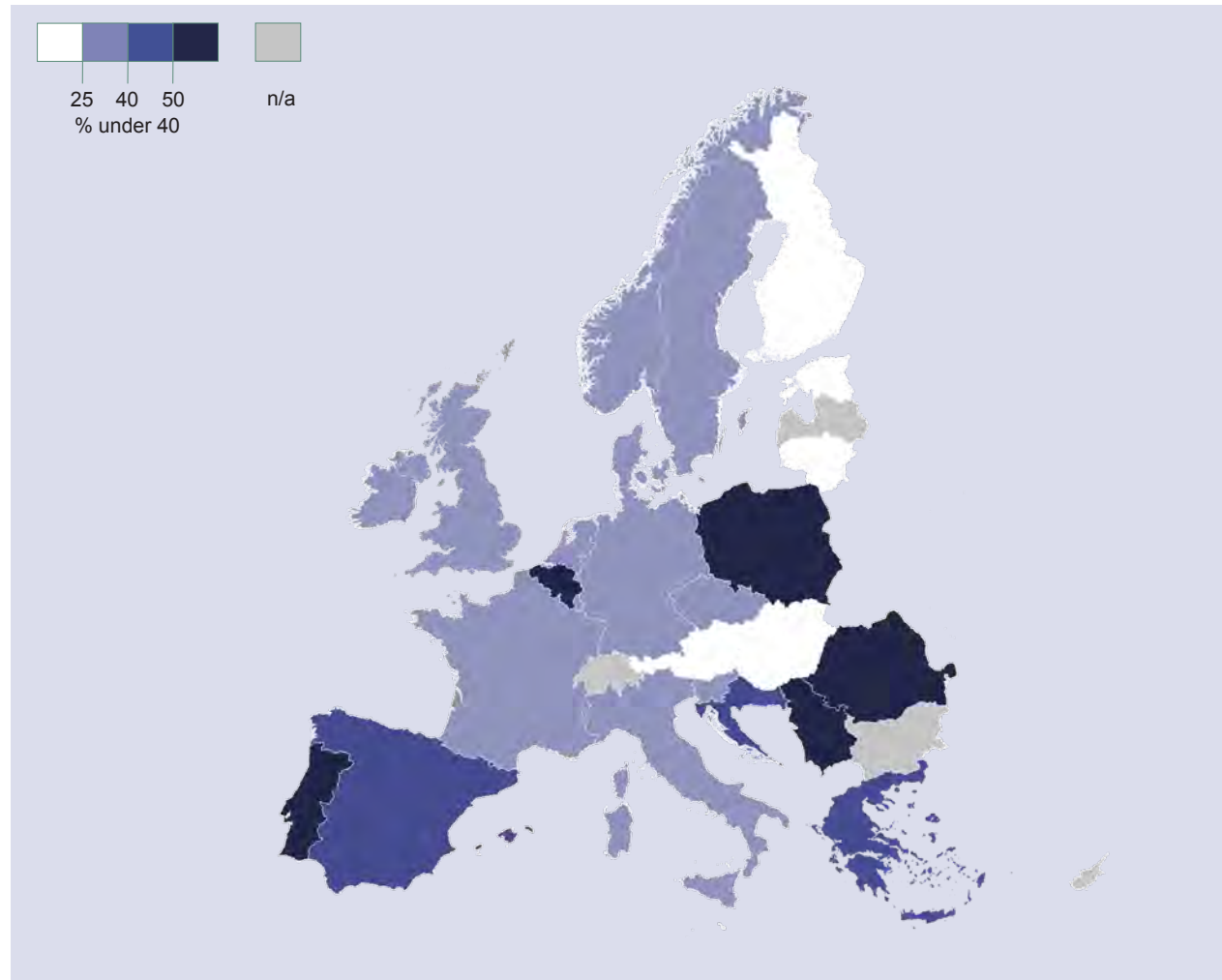
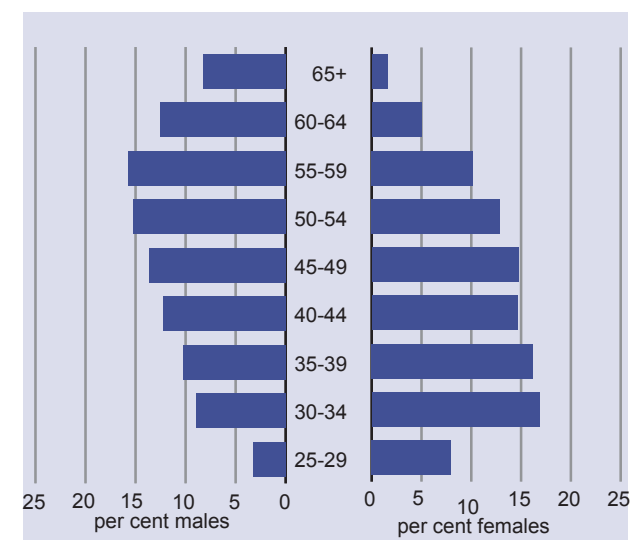


TABLE 1-6
AGE OF ARCHITECTS ANALYSED BY COUNTRY

per cent	age of architects								
	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	0	3	6	10	21	21	11	16	13
Belgium*	23	15	12	6	14	8	9	9	3
Croatia	4	23	14	17	7	6	14	5	10
Czechia	2	12	18	19	13	7	8	8	13
Denmark	7	13	12	8	12	7	12	16	12
Estonia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	3	9	10	10	14	17	17	12	7
France	4	10	14	12	14	11	11	11	12
Germany	4	10	11	14	15	17	16	10	4
Greece	6	12	23	18	12	7	8	9	4
Hungary*	0	7	5	10	7	12	5	17	38
Ireland	3	11	15	16	17	11	11	9	9
Italy	5	16	14	10	14	14	11	8	7
Lithuania*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg	1	10	16	18	21	13	11	8	3
Netherlands*	11	9	7	7	11	13	15	17	11
Norway	4	15	12	17	11	8	6	12	15
Poland*	32	25	13	7	6	5	7	4	1
Portugal	14	19	17	17	13	7	6	4	3
Romania	8	34	16	14	7	5	3	5	7
Serbia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Slovakia	1	7	11	17	17	9	12	10	15
Slovenia	0	8	20	18	26	7	7	11	2
Spain	17	18	13	15	13	9	5	5	4
Sweden	5	15	14	16	11	11	10	11	8
United Kingdom	5	11	10	13	10	8	11	12	20
2020 EUROPE-26	7	13	14	12	13	13	12	9	7
2018 EUR-26	7	11	13	15	15	13	11	9	6
2016 EUR-27	8	13	15	15	13	11	10	8	6
2014 EUR-26	7	12	15	16	13	13	11	7	6
2012 EUR-25	9	15	16	14	13	12	10	6	4
2010 EUR-23	10	15	15	10	12	12	12	8	4

* caution - small sample

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



|2| ARCHITECTURE - THE MARKET



Schloßstraße 24 Frankfurt Germany
Architect: Stefan Forster Architekten
Photograph: Lisa Farkas

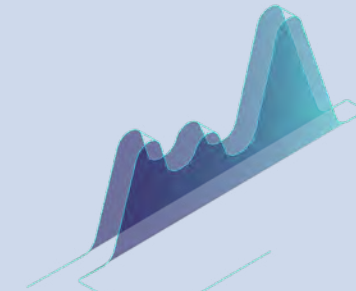
CHAPTER 2 - SUMMARY



€1914 billion
Value of construction market



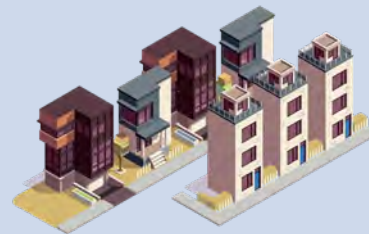
€17 billion
Value of architectural market



-19
Future sentiment is weak



54%
Private housing work



56%
Building design work



3%
Work from outside own country

2.1 ECONOMIC BACKGROUND

Governments across Europe are spending eye-watering sums of money to support their economies. The succession of stop-go policies has revealed inconsistencies and abrupt changes; policies are being re-written continuously. The lockdowns of Spring 2020 sent Europe's Gross Domestic Product sharply negative. As the economy re-opened, the service and manufacturing sectors adapted quickly. Pent-up demand from consumers, coupled with a backlog of orders and improving global trade, resulted in an economic rebound in Quarter 2.

Fiscal policy has been used by European governments to provide targeted support. During lockdown and subsequent restrictions, governments have used cash to support short-time working, postponing tax collection and providing loans and grants to business. The recovery phase after lockdown included the bringing forward of public investment or boosting public investment in areas like infrastructure. The rise in public debt and deficits is only a long-term possibility because real interest rates are zero or

negative, and because central banks around the world share this common approach. The 19 countries of the Eurozone have agreed emergency measures including the provision of recovery funds. Principally aimed at minimising divergence within the Eurozone, the ECB's approach is designed to facilitate cheaper supplies of funds from which individual governments can borrow.

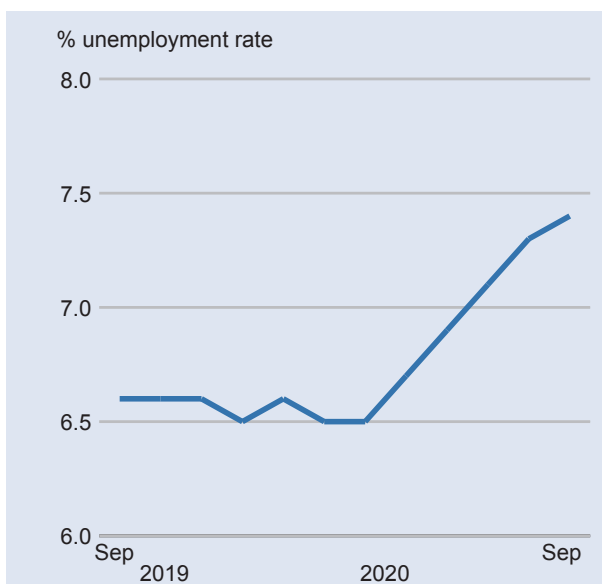
But there remain many perils ahead. A second wave is gathering traction in much of Europe during Quarter 3, further national lockdowns have become necessary and there are concerns about shortages of doctors and other medical staff in some countries particularly in central and eastern Europe. While the future is perilously difficult to predict, forecasts released in Quarter 3 2020 from the International Monetary Fund (IMF) and the Organisation for Economic Co-operation and Development (OECD) suggest an economic re-bounce for Europe in 2021. Countries which had recorded the sharpest downturn in 2020 look set to see the strongest recover in 2021, according to the forecasters.

TABLE 2-1
CHANGE IN GDP - PROJECTIONS 2020 & 2021

	2019 actual	2020 OECD	2020 IMF	2021 OECD	2021 IMF
France	1.5	-9.5	-9.8	5.8	6.0
Germany	0.6	-5.4	-6.0	4.6	4.2
Italy	0.3	-10.5	-10.6	5.4	5.2
Spain	2.0	n/a	-12.8	n/a	7.2
United Kingdom	1.5	-10.1	-9.8	7.6	5.9
EURO AREA	1.3	-7.9	-8.3	5.1	5.2

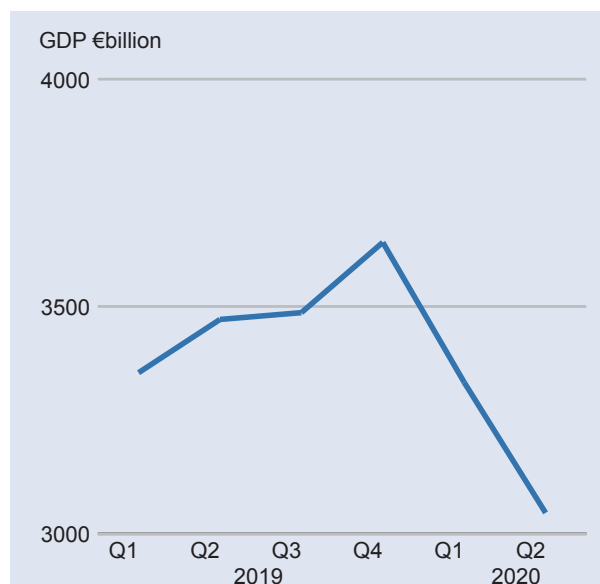
Sources:
 OECD Interim Economic Outlook Forecasts September 2020
 International Monetary Fund. 2020. World Economic Outlook: A Long and Difficult Ascent. Washington DC, October 2020

CHART 2-1
MONTHLY UNEMPLOYMENT RATE EUROPE-31



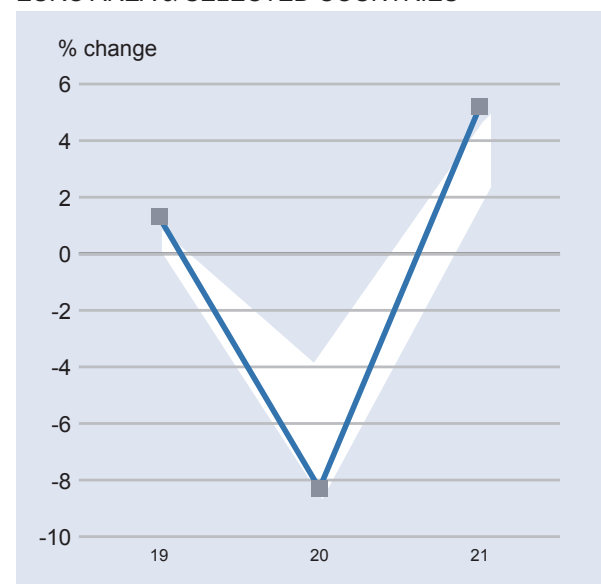
Source: Eurostat

CHART 2-2
QUARTERLY GDP EUROPE-31



Source: Eurostat

CHART 2-3
CHANGE IN GDP - PROJECTIONS 2020 & 2021.
EURO AREA & SELECTED COUNTRIES



white shading = range of projections for five largest economies DE, FR, IT, UK, ES
 Source: IMF World Economic Outlook October 2020

2.2 THE CONSTRUCTION MARKET IN EUROPE

The total value of the European construction market ('EUROPE - 31') is estimated to be worth €1,914 billion in 2020. This includes civil engineering and infrastructure work.

Output is dominated by five countries - Germany, the United Kingdom, France, Italy and Spain. Together, these countries account for more than half of Europe's total construction output. When measured per head of the general population, the highest values per head are recorded in Luxembourg and Norway.

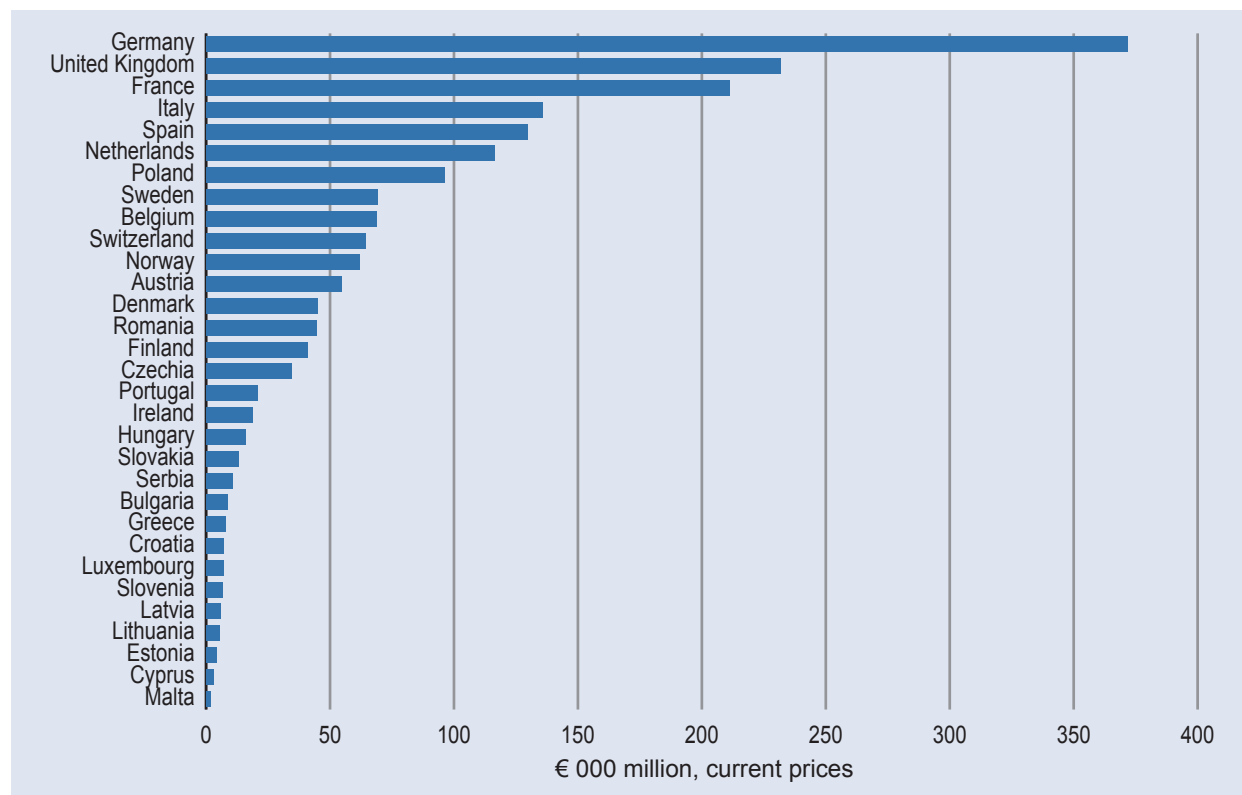
In a new analysis for this year's survey we have measured construction output per architect. Norway, the Netherlands and Finland emerge as having the highest values of construction output per architect.

CHART 2-4
QUARTERLY CONSTRUCTION OUTPUT EUROPE-31



Source: Eurostat

CHART 2-5
ESTIMATED SIZE OF EUROPE CONSTRUCTION MARKET 2020



Base: all 31 European countries

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

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

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019 *	2020 **
Austria	43654	44932	46813	47248	48263	50174	51373	54428	57350	61021	54660
Belgium	59002	65289	64825	64222	65813	67155	69964	73106	77279	78871	68861
Bulgaria	7972	7812	7866	6600	7752	9191	6357	7344	8500	9343	8537
Croatia	6531	6155	5649	5318	5163	5292	5587	5931	6688	7131	7191
Cyprus	4025	3480	2848	2109	1869	1949	2303	3027	3746	3904	3066
Czechia	33247	32686	29200	27131	26446	28649	27657	30399	34820	37164	34316
Denmark	25679	27394	27622	27472	28434	32097	35463	38030	41991	42571	45171
Estonia	2013	2664	3053	3112	3044	3024	3225	3796	4288	4439	4292
Finland	28296	30311	31153	30379	29544	30338	33262	35949	38685	40334	41004
France	264952	279232	279204	282404	277387	271069	272638	284900	297126	311348	211283
Germany	236154	255237	263345	267325	279823	284094	299270	313084	341223	368471	371738
Greece	20959	16868	14960	12731	10366	9256	11476	11342	10069	10726	7866
Hungary	9157	8653	7946	8845	9854	10382	9385	12152	15610	18105	16019
Ireland	12775	9955	7582	9329	13405	15031	19489	24573	26694	28873	18565
Italy	253848	255177	226655	207275	192491	187168	184700	184686	187862	193859	135795
Latvia	3573	4538	4858	5117	5239	5032	3897	4829	5612	6018	5974
Lithuania	2781	3462	3438	3883	4518	4459	4426	4869	5537	5872	5624
Luxembourg	4869	5382	5207	5418	6292	6555	7144	7462	8215	8629	6989
Malta	806	821	842	866	981	1119	1231	1437	1647	1942	1967
Netherlands	87770	91512	84506	79607	80907	84840	92352	98230	108437	117097	116458
Norway	40974	47973	57008	57100	56496	55646	57609	61205	62985	65897	62071
Poland	77417	84489	79472	75103	77002	80993	77120	80211	93734	99256	96202
Portugal	30333	27104	20763	18284	16878	17015	16807	18770	20685	22425	20581
Romania	31386	28750	30202	28033	23790	27533	28147	27091	30954	40354	44772
Serbia	4471	5526	5193	4357	4423	5137	5447	6159	7406	10438	10634
Slovakia	12366	12945	12087	10618	11644	13733	12936	14316	15620	15263	13112
Slovenia	7083	6110	5659	5290	5532	5454	5299	5928	6928	7404	6537
Spain	195568	160224	132857	117942	120309	125007	126990	138653	151606	162643	129529
Sweden	40073	46447	50339	51276	51893	56474	58164	63948	68814	74283	69005
Switzerland	48032	57474	60352	60829	63391	72426	70429	70185	68569	66648	64528
United Kingdom	241123	244035	270146	272867	312243	374522	347462	344453	356761	364566	231878
EUROPE - 31 (€ 000 million)	1837	1873	1842	1798	1841	1941	1948	2030	2165	2285	1914

Source of all data:
 Eurostat National Accounts - output at current prices.
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* Data for several countries 2019: Mirza & Nacey estimates derived from the most recent Eurostat Construction Output Production Indices.

** Data for 2020: Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices generally these are to Q2 2020.

Construction output includes civil engineering and infrastructure work.

Construction output in Europe-31 had been rising year on year between 2015 and 2019. A series of five consecutive annual increases were starting to make up for the recession following the Financial Crisis. The pandemic has turned this around, with a predicted reduction in output of 16 per cent for 2020. It is important to note that the 2020 estimates are based only on the first two quarters of the year.

CHART 2-6
CHANGE IN CONSTRUCTION OUTPUT IN EUROPE-31 2010 TO 2020

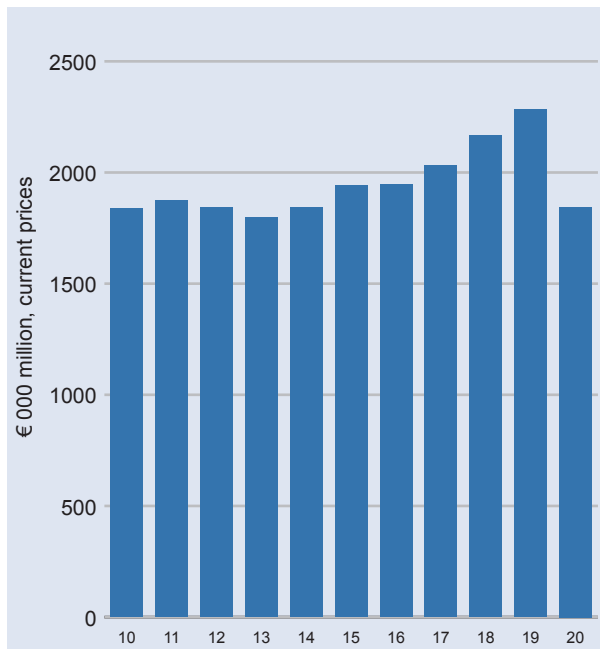
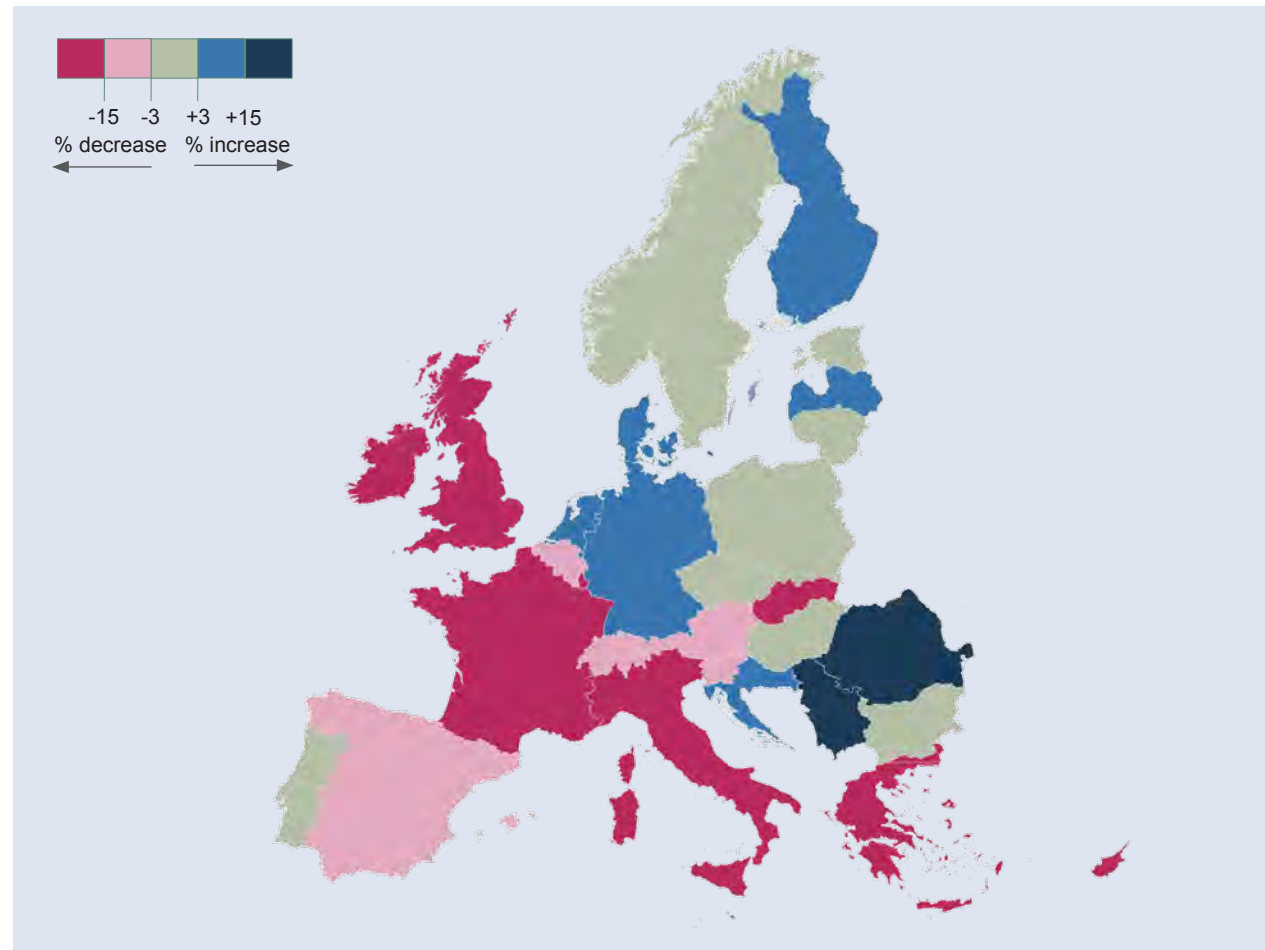


CHART 2-7
CHANGES IN CONSTRUCTION OUTPUT 2019 TO 2020



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

TABLE 2-3
ESTIMATED SIZE OF CONSTRUCTION MARKET 2020 BY COUNTRY AND COMPARATIVE VALUES

	construction output (estimated € million)	population (number as at 01.01.2020)	construction output per head of population (€)	architects (estimated number)	construction output per architect (€)
Austria	54660	8901064	6141	5800	9424163
Belgium	68861	11549888	5962	15100	4560323
Bulgaria	8537	6951482	1228	2100	4065342
Croatia	7191	4058165	1772	2700	2663407
Cyprus	3066	888005	3453	950	3227295
Czechia	34316	10693939	3209	4000	8578885
Denmark	45171	5822763	7758	10400	4343335
Estonia	4292	1328976	3229	800	5364656
Finland	41004	5525292	7421	3800	10790650
France	211283	67098824	3149	30000	7042754
Germany	371738	83166711	4470	117500	3163724
Greece	7866	10709739	735	17800	441932
Hungary	16019	9769526	1640	7300	2194371
Ireland	18565	4963839	3740	3500	5304282
Italy	135795	60244639	2254	152200	892214
Latvia	5974	1907675	3132	810	7375878
Lithuania	5624	2794090	2013	1450	3878724
Luxembourg	6989	626108	11163	1100	6353654
Malta	1967	514564	3822	1000	1966750
Netherlands	116458	17407585	6690	10400	11197896
Norway	62071	5367580	11564	4000	15517835
Poland	96202	37958138	2534	14000	6871562
Portugal	20581	10295909	1999	26000	791583
Romania	44772	19317984	2318	10500	4264038
Serbia	10634	6926705	1535	8000	1329227
Slovakia	13112	5457873	2402	1800	7284201
Slovenia	6537	2095861	3119	1460	4477687
Spain	129529	47329981	2737	47600	2721200
Sweden	69005	10327589	6682	7000	9857818
Switzerland	64528	8606033	7498	7500	8603685
United Kingdom	231878	67025542	3460	42500	5455962
EUROPE - 31 - 2020	1914225	535632069	3574	559070	3423946

Source: Construction output and population data - Eurostat
Copyright © Eurostat. All Rights Reserved. Data for 2020 are Mirza & Nacey estimates based on most recent Eurostat Construction Output Production Indices.
The total for EUROPE-31 is Mirza & Nacey estimate.

Construction output includes civil engineering and infrastructure work.

2.3 THE ARCHITECTURAL MARKET IN EUROPE

The value of the architectural market continues to increase, rising by 4 per cent since the 2018 survey. This represents a little under 1 per cent of the total value of construction (using the 2019 construction output figure) and equates to approximately €30,000 per architect on average.

The total value of the architectural market in 2020 for Europe-31 is estimated to be €17 billion. This figure relates to the total turnover, or value of the revenue generated by the profession. Each individual country figure is an estimate and should be considered with caution. The estimate has been grossed-up from the survey data

(see Appendix I for details of the methodology used). The largest architectural markets remain Germany, the United Kingdom, Italy, and France, between them accounting for two thirds of the market in Europe overall.

CHART 2-8
VALUE OF ARCHITECTURAL MARKET AVERAGE PER ARCHITECT

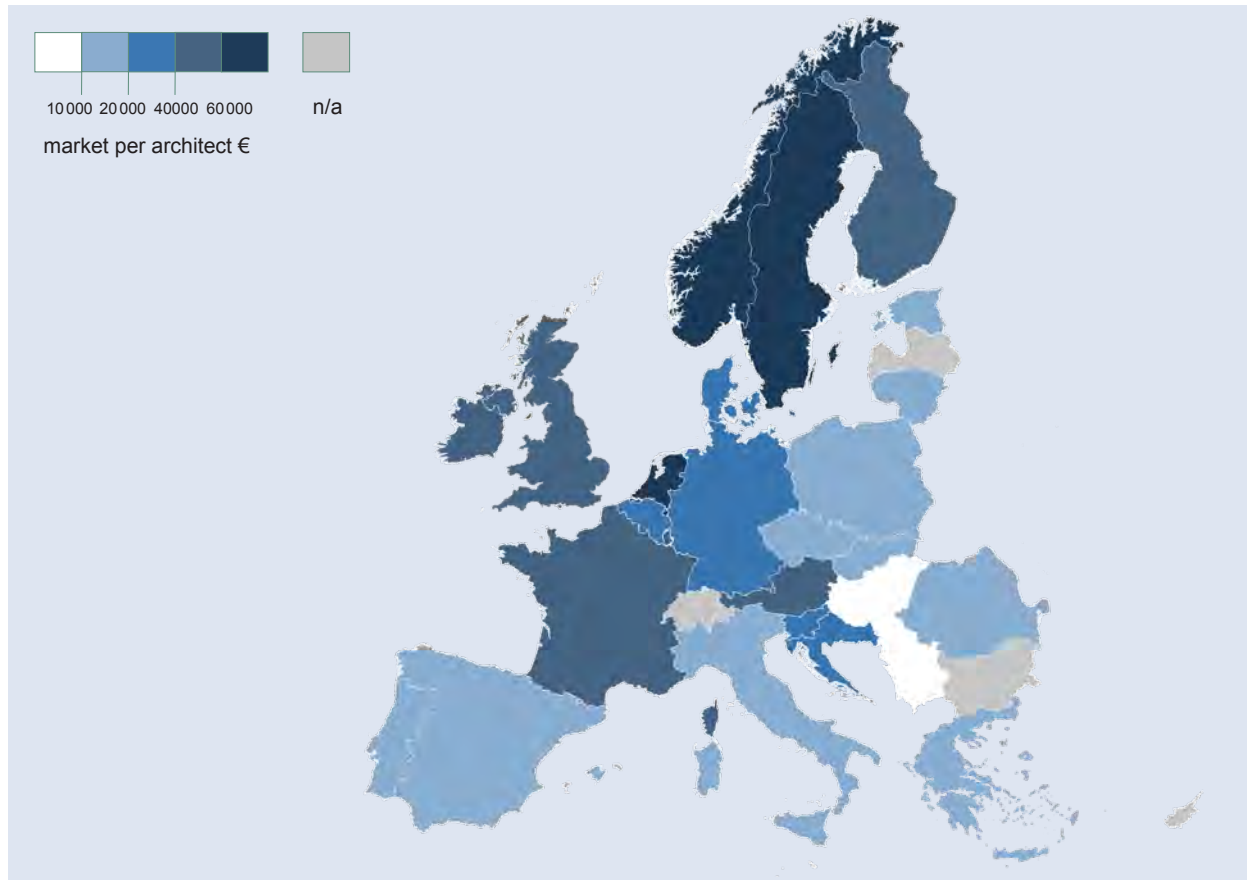
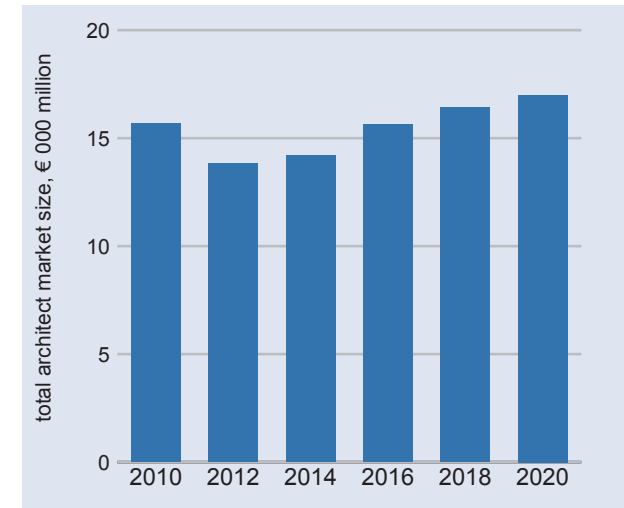


CHART 2-9
CHANGES 2010 TO 2020 IN ESTIMATED VALUE OF ARCHITECTURAL MARKET IN EUROPE-31



Base: all 31 European countries
Source: Mirza & Nacey estimates based on survey data

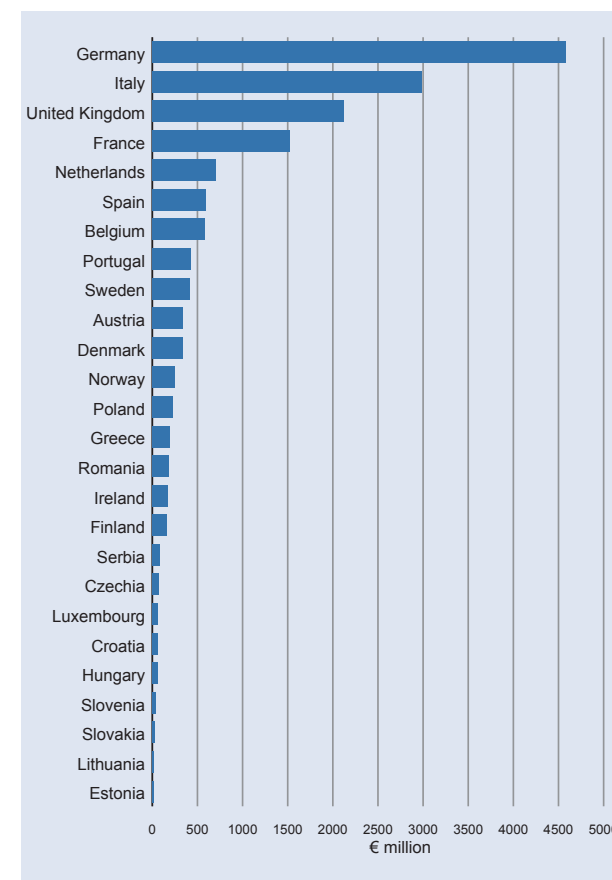
TABLE 2-4
ESTIMATED SIZE OF ARCHITECTURAL MARKET 2020 BY COUNTRY AND COMPARATIVE VALUES

	2020				2018	2016	2014	2012	2010
	market size (€000s)	value per architect (€)	value per 1000 population (€)	architectural market as per cent construction					
Austria	340 391	58 688	38 242	0.56	287 174	279 307	281 241	262 774	256 292
Belgium*	577 331	38 234	49 986	0.73	569 489	610 346	436 306	529 292	556 280
Croatia	59 518	22 044	14 666	0.83	59 602	54 841	44 798	50 235	64 290
Czechia	74 016	18 504	6 921	0.20	112 931	92 210	139 458	153 433	73 045
Denmark	333 893	32 105	57 343	0.78	429 470	482 321	392 062	447 607	308 697
Estonia*	12 505	15 631	9 409	0.28	16 730	14 396	16 330	29 277	12 667
Finland	165 869	43 650	30 020	0.41	188 952	178 017	133 689	161 704	117 456
France	1 527 379	50 913	22 763	0.49	961 483	984 215	907 837	1 254 376	1 301 699
Germany	4 576 636	38 950	55 030	1.24	4 970 740	5 015 212	5 047 349	4 192 657	4 094 601
Greece	190 789	10 718	17 815	1.78	82 696	n/a	102 646	170 961	289 623
Hungary*	58 988	8 081	6 038	0.33	47 024	33 267	n/a	60 566	n/a
Ireland	169 174	48 335	34 081	0.59	149 498	110 600	90 682	112 102	172 362
Italy	2 982 972	19 599	49 514	1.54	2 072 306	1 758 087	1 916 761	2 775 280	2 708 910
Lithuania*	21 388	14 750	7 655	0.36	16 850	10 641	n/a	9 676	11 455
Luxembourg	65 533	59 576	104 668	0.76	49 588	68 308	49 361	38 264	n/a
Netherlands*	704 365	67 727	40 463	0.60	782 773	939 867	910 000	807 000	976 000
Norway	245 511	61 378	45 740	0.37	340 447	n/a	n/a	n/a	n/a
Poland*	228 586	16 328	6 022	0.23	208 042	212 481	n/a	210 575	258 803
Portugal	427 214	16 431	41 494	1.91	348 279	276 051	176 636	261 110	n/a
Romania	182 265	17 359	9 435	0.45	135 682	76 954	79 471	90 111	63 551
Serbia*	77 970	9 746	11 256	0.75	n/a	n/a	n/a	n/a	n/a
Slovakia	28 709	15 949	5 260	0.19	n/a	22 058	15 211	n/a	41 000
Slovenia	39 713	27 201	18 948	0.54	30 396	35 700	24 874	42 110	10 359
Spain	593 043	12 459	12 530	0.36	555 550	461 124	332 999	336 420	n/a
Sweden	420 937	60 134	40 759	0.57	532 201	470 484	347 110	330 785	356 300
United Kingdom	2 124 952	49 999	31 704	0.58	2 265 051	2 169 202	1 978 835	2 006 403	1 955 929
2020 EUROPE-26	16 229 648	29 686	31 406	0.74					
2018 EUROPE-26	15 198 352	28 262	30 184	0.8	15 198 352				
2016 EUROPE-27	15 603 101	27 300	26 651	0.9		15 603 101			
2014 EUROPE-26	14 340 253	26 109	27 176	0.9			14 340 253		
2012 EUROPE-25	14 424 668	27 770	25 870	1.0				14 424 668	
2010 EUROPE-23	14 636 411	33 253	28 716	1.1					14 636 411

'Market size' refers to the architectural market as measured as the sum of the turnover earned by private architectural practices in each country. Data refers to 2019/20. The market size has been estimated see Appendix for an explanation of the methodology.

* caution - small sample

CHART 2-10
ESTIMATED VALUE OF ARCHITECTURAL MARKET



2.4 THE ARCHITECTURAL MARKET ANALYSED BY TYPE & SECTOR

Private housing remains the most important sector for architects, by far. Almost nine out of ten architectural practices have undertaken some private housing design work in the past year and the sector generates 54 per cent of average practice turnover. The majority of this comes from small scale housing projects such as house extensions, loft conversions and one-off individual houses.

No other building sector rivals private housing's dominance. The 46 per cent of average practice revenue which is not private housing work is split between commercial, other private and public sectors with no single sector accounting for more than 10 per cent of practice revenue. The office sector represents 9 per cent of average practice revenue, other private - which includes mixed projects - accounts for another 6 per cent. Education accounts for 7 per cent of average practice turnover.

Individual houses and extensions form a higher proportion of practice revenue for practices in Greece, Portugal and Spain. Higher proportions of revenue from other private housing work are recorded by architects in Germany, Poland, Serbia and Lithuania (small sample sizes). Office work accounts for a higher proportion of practice revenue in countries including Finland, Norway and Slovenia while a larger proportion of practice turnover comes from retail in Spain than elsewhere. Architects in Austria, Slovakia and Denmark report the highest share of practice turnover coming from public housing work.

Architects generate more practice turnover from refurbishment work (56 per cent) than from new build (44 per cent). Countries where architects report the highest proportions of turnover from new build include Estonia, Norway, Croatia and Estonia. This year we have split refurbishment into heritage work and other refurbishment. The analysis reveals that heritage accounts for 14 per cent of average practice revenue, with particularly higher proportions in Italy, Serbia and the United Kingdom. Splitting refurbishment work now means that architects report an almost equal proportion of turnover is derived from new build as from 'other' refurbishment work.

TABLE 2-5
PROPORTION OF WORK UNDERTAKEN
BY BUILDING TYPE ANALYSED BY COUNTRY

per cent	new build	heritage	other refurbishment
Austria	59	7	34
Belgium*	44	4	52
Croatia	67	11	23
Czechia	59	11	30
Denmark	49	16	35
Estonia*	87	3	10
Finland	53	14	33
France	41	12	47
Germany	48	13	39
Greece	56	9	35
Hungary*	65	10	25
Ireland	46	15	38
Italy	18	19	63
Lithuania*	60	11	29
Luxembourg	55	10	35
Netherlands*	54	16	30
Norway	68	7	26
Poland*	62	5	33
Portugal	49	14	37
Romania	71	7	22
Serbia*	35	20	45
Slovakia	64	14	22
Slovenia	67	13	19
Spain	47	13	40
Sweden	61	8	31
United Kingdom	36	19	45
2020 EUROPE-26	44	14	43
<i>2018 EUROPE-26</i>	<i>41</i>	<i>59</i>	
<i>2016 EUROPE-27</i>	<i>41</i>	<i>59</i>	
<i>2014 EUROPE-26</i>	<i>37</i>	<i>63</i>	
<i>2012 EUROPE-25</i>	<i>n/a</i>	<i>n/a</i>	
<i>2010 EUROPE-23</i>	<i>n/a</i>	<i>n/a</i>	

* caution - small sample

TABLE 2-6
PROPORTION OF WORK AND INVOLVEMENT
BY BUILDING SECTOR

per cent	per cent of work	per cent of practices involved
private housing	54	87
offices	9	35
retail	4	17
leisure and the arts	4	16
industrial	6	23
health	3	11
education	7	22
public housing	3	11
other private	6	28
other public	5	25

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

CHART 2-11
PROPORTION OF MARKET BY BUILDING SECTOR

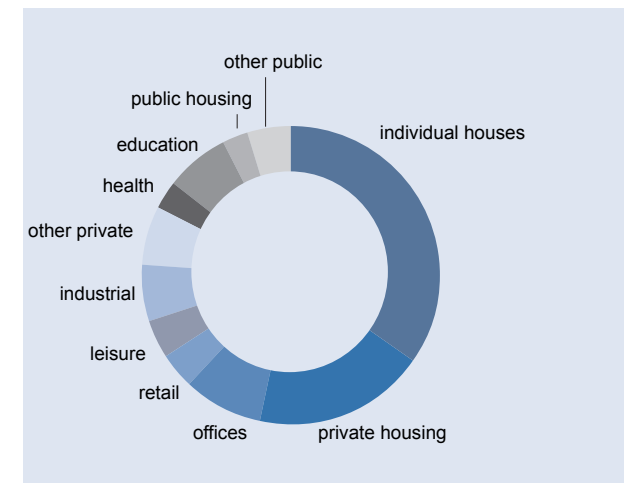
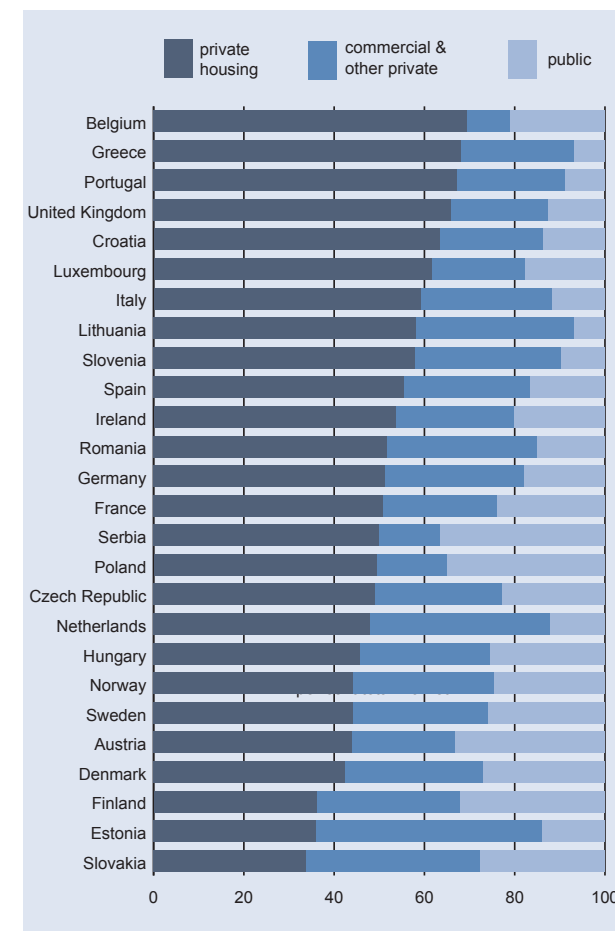


TABLE 2-7
PROPORTION OF WORK UNDERTAKEN BY BUILDING SECTOR ANALYSED BY COUNTRY

per cent	individual houses extensions loft conversions	private housing	offices	retail	leisure	industrial	health	education	public housing	other private	other public	TOTAL
Austria	32	12	7	3	3	4	4	8	14	6	8	100
Belgium*	54	16	4	2	0	3	2	5	12	1	1	100
Croatia	45	19	3	3	2	10	0	2	1	6	11	100
Czechia	35	14	9	3	6	3	2	5	2	7	14	100
Denmark	31	11	14	4	4	1	2	7	15	9	4	100
Estonia*	24	12	36	4	2	2	0	10	4	6	0	100
Finland	24	12	16	2	4	2	4	11	8	9	10	100
France	35	16	6	5	3	4	4	6	5	7	9	100
Germany	29	23	11	2	5	7	4	10	2	5	3	100
Greece	63	5	3	6	5	4	1	3	1	7	3	100
Hungary*	38	7	5	2	4	9	6	3	2	9	14	100
Ireland	43	11	8	5	5	3	5	6	5	6	4	100
Italy	42	18	5	7	3	5	2	2	1	10	7	100
Lithuania*	36	22	13	5	3	6	0	0	3	9	4	100
Luxembourg	50	12	8	3	2	4	2	7	4	4	5	100
Netherlands*	37	11	7	6	6	12	7	1	2	9	3	100
Norway	30	14	13	4	3	8	4	10	4	4	7	100
Poland*	26	23	3	3	1	5	4	2	9	3	20	100
Portugal	56	11	5	7	2	4	3	1	1	5	4	100
Romania	39	13	7	6	5	9	4	5	4	6	2	100
Serbia*	17	33	5	8	0	0	0	0	0	0	37	100
Slovakia	27	7	10	8	5	8	2	2	14	8	11	100
Slovenia	53	5	14	4	2	6	1	2	1	6	5	100
Spain	54	1	4	10	1	3	2	1	1	10	13	100
Sweden	25	19	12	4	6	3	2	13	4	4	7	100
United Kingdom	51	14	5	3	5	3	3	2	5	6	2	100
2020 EUROPE-26	35	19	9	4	4	6	3	7	3	6	5	100
<i>2018 EUROPE-26</i>	<i>36</i>	<i>18</i>	<i>8</i>	<i>5</i>	<i>4</i>	<i>6</i>	<i>3</i>	<i>6</i>	<i>3</i>	<i>8</i>	<i>4</i>	<i>100</i>
<i>2016 EUROPE-27</i>	<i>39</i>	<i>16</i>	<i>7</i>	<i>7</i>	<i>4</i>	<i>5</i>	<i>3</i>	<i>4</i>	<i>2</i>	<i>9</i>	<i>6</i>	<i>100</i>
<i>2014 EUROPE-26</i>	<i>40</i>	<i>13</i>	<i>6</i>	<i>6</i>	<i>3</i>	<i>6</i>	<i>3</i>	<i>5</i>	<i>3</i>	<i>7</i>	<i>9</i>	<i>100</i>
<i>2012 EUROPE-25</i>	<i>42</i>	<i>9</i>	<i>6</i>	<i>6</i>	<i>3</i>	<i>5</i>	<i>2</i>	<i>4</i>	<i>3</i>	<i>9</i>	<i>11</i>	<i>100</i>
<i>2010 EUROPE-23</i>	<i>30</i>	<i>14</i>	<i>8</i>	<i>5</i>	<i>4</i>	<i>6</i>	<i>4</i>	<i>6</i>	<i>6</i>	<i>7</i>	<i>10</i>	<i>100</i>

* caution - small sample

CHART 2-12
PROPORTION OF WORK UNDERTAKEN IN EACH MAIN BUILDING SECTOR RANKED IN ORDER OF HIGHEST PRIVATE HOUSING WORK



2.5 THE ARCHITECTURAL MARKET ANALYSED BY TYPE OF SERVICE

Nearly one third of practice turnover comes from concept design and another quarter from detailed design. Together, these two aspects of building design provide the majority of average practice turnover. Architects in Germany, Denmark, Italy and Serbia (small sample) report the lowest proportion of turnover derived from building design, although in all but one of these countries building design still accounts for more than 50 per cent of average practice revenue.

A wide range of other services account for the remainder of practice turnover. Interior design accounts for a higher proportion of practice turnover in Italy, Greece and Serbia.

CHART 2-13
PROPORTION OF MARKET BY TYPE OF SERVICE

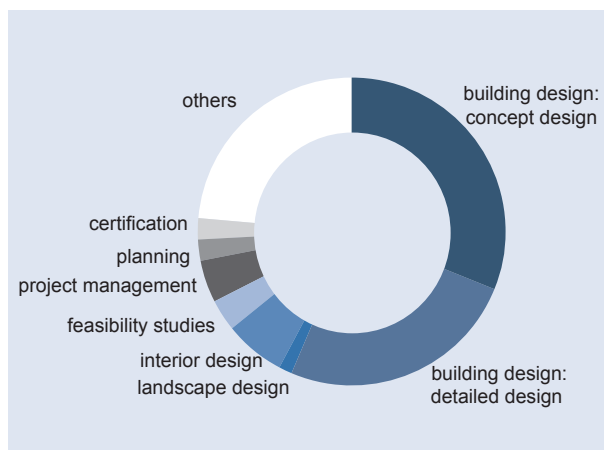


TABLE 2-8
PROPORTION OF WORK UNDERTAKEN BY EACH SERVICE TYPE

per cent	building design											TOTAL
	concept design	detailed design	landscape design	interior design	feasibility studies	project management	urban planning	certification	property valuation	BIM co-ordination	other service	
Austria	29	44	2	3	5	6	2	2	0	0	7	100
Belgium*	29	44	1	8	5	5	2	0	1	2	3	100
Croatia	26	42	4	11	2	2	4	1	0	0	7	100
Czechia	27	39	4	9	0	6	9	0	0	1	4	100
Denmark	23	30	9	5	1	16	0	1	0	0	14	100
Estonia*	43	38	1	8	0	7	0	2	0	0	0	100
Finland	29	41	3	7	2	4	6	1	0	1	6	100
France	40	29	1	8	9	5	3	0	0	0	5	100
Germany	34	16	1	4	2	2	1	3	1	0	36	100
Greece	27	35	1	12	1	7	0	2	0	1	13	100
Hungary*	27	46	0	3	0	3	7	0	5	0	8	100
Ireland	30	39	2	6	5	4	1	2	0	0	10	100
Italy	19	32	3	12	5	9	2	3	4	0	12	100
Lithuania*	13	53	6	9	2	10	1	0	0	3	3	100
Luxembourg	43	28	3	3	6	7	4	1	1	1	4	100
Netherlands*	31	38	1	6	7	11	2	1	0	2	1	100
Norway	38	31	3	6	4	2	9	1	0	2	3	100
Poland*	36	47	2	7	3	1	1	0	1	1	2	100
Portugal	52	24	1	8	3	3	3	1	1	1	4	100
Romania	29	40	1	8	5	4	6	1	0	0	6	100
Serbia*	9	10	2	43	0	10	26	0	0	0	0	100
Slovakia	23	44	4	9	2	9	6	0	0	1	2	100
Slovenia	23	39	1	8	4	12	5	1	1	0	6	100
Spain	19	49	0	5	2	3	4	5	3	0	9	100
Sweden	29	40	1	5	5	4	6	1	0	1	9	100
United Kingdom	29	42	1	3	7	8	1	2	0	0	7	100
2020 EUR-26	31	25	1	6	3	5	2	2	2	0	22	100
2018 EUR-26	67		2	10	3	4	3	2	2	n/a	7	100
2016 EUR-27	62		2	11	3	4	3	3	2	n/a	9	100
2014 EUR-26	57		3	11	4	5	4	4	2	n/a	11	100
2012 EUR-25	50		2	14	6	7	6	n/a	n/a	n/a	16	100
2010 EUR-23	69		2	8	4	6	7	n/a	n/a	n/a	4	100

* caution - small sample

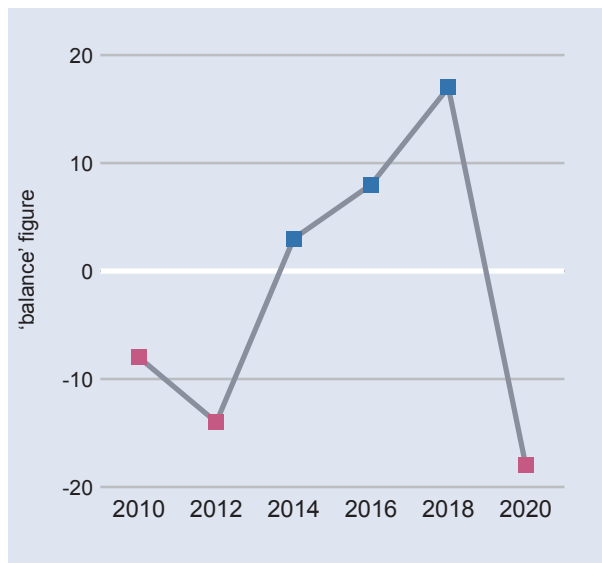
2.6 FUTURE PROSPECTS & THE IMPACT OF COVID-19

Future sentiment is strongly negative in this year's survey. The 'balance' statistic - the difference between architects who expect workloads to increase and those expecting a decrease - has swung from the most positive reading ever in the 2018 survey to its most negative reading this year. The figure is -19, lower even

than the 2012 figure. The 'balance' figure is most strongly negative in Germany, Portugal, Ireland and the United Kingdom but is, in fact, positive in a handful of countries including Norway, Finland, Greece and Luxembourg.

In a new question in this year's survey, respondents refined their response by private or public sector. The private sector 'balance' figure is positive in Norway, Luxembourg, Sweden, Greece and Italy; while the public sector 'balance' figure is positive only in Denmark and Norway.

CHART 2-14
CHANGE IN WORKLOAD PREDICTIONS
(BALANCE FIGURE).
ALL SURVEY COUNTRIES 2010 TO 2020 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 2-15
WORKLOAD PREDICTIONS FOR 2021

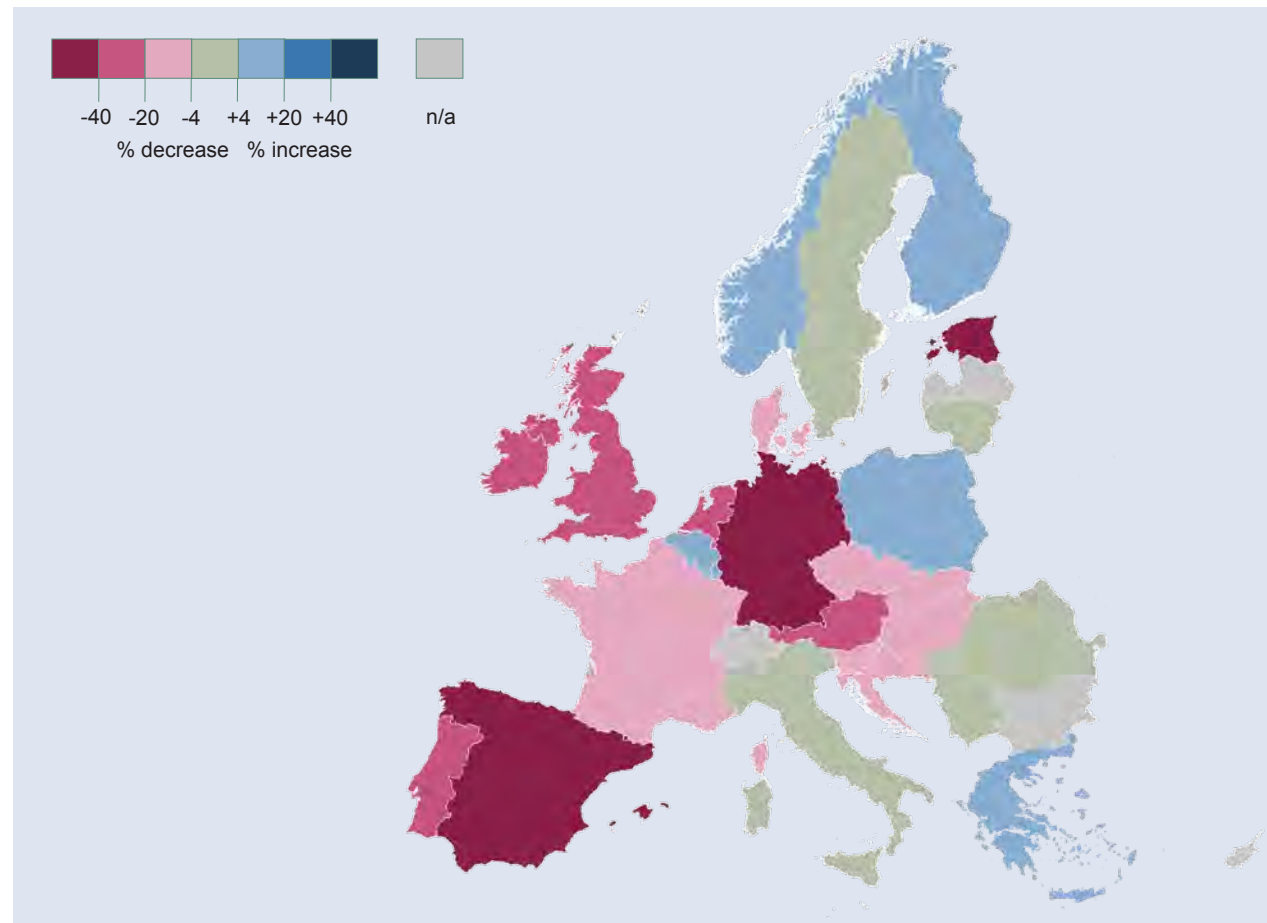


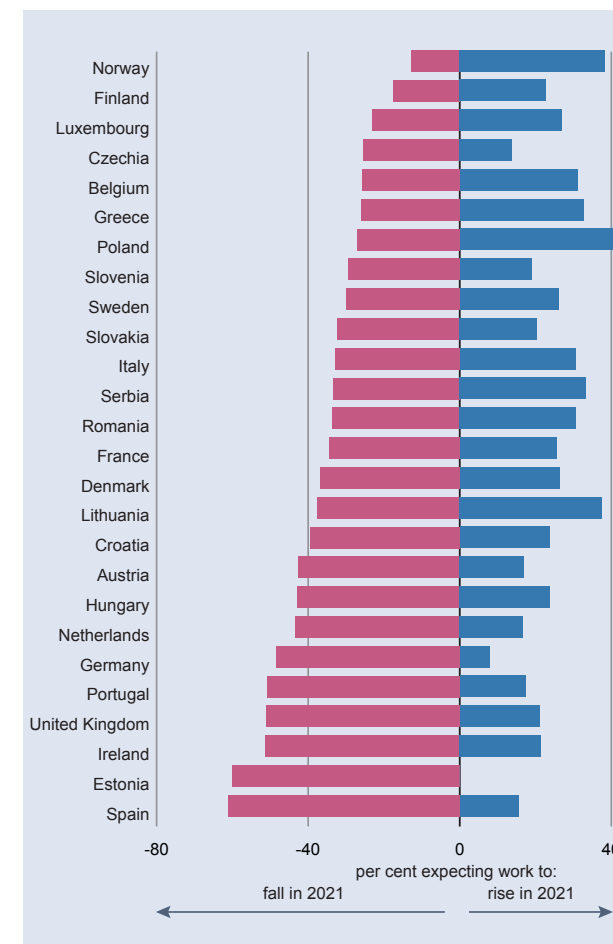
TABLE 2-9
 FUTURE WORKLOAD PROSPECTS FOR 2021 ANALYSED BY COUNTRY

per cent	workload precitions - all work			all work balance	private sector balance	public sector balance
	per cent of Principals who expect their practice workloads to change over the coming 12 months					
	rise	no change	fall			
Austria	17	40	43	-26	-39	-21
Belgium*	31	43	26	+5	-4	-13
Croatia	24	37	39	-16	-20	-47
Czechia	14	61	25	-12	-20	-20
Denmark	26	37	37	-11	-16	+11
Estonia*	0	40	60	-60	0	-40
Finland	23	60	18	+5	0	-2
France	26	40	34	-9	-5	-20
Germany	8	44	49	-41	-37	-35
Greece	33	41	26	+7	+5	-15
Hungary*	24	33	43	-19	-32	-20
Ireland	22	27	51	-30	-32	-20
Italy	31	37	33	-2	+2	-22
Lithuania*	38	25	38	0	-13	-17
Luxembourg	27	50	23	+4	+7	-21
Netherlands*	17	40	43	-27	-28	-30
Norway	38	49	13	+26	+25	+9
Poland*	41	32	27	+14	0	-14
Portugal	17	32	51	-33	-34	-35
Romania	31	36	34	-3	-8	-6
Serbia*	33	33	33	0	0	-50
Slovakia	20	47	32	-12	-12	-15
Slovenia	19	52	29	-10	-9	-30
Spain	16	23	61	-46	-46	-34
Sweden	26	44	30	-4	+4	-6
United Kingdom	21	28	51	-30	-25	-29
2020 EUROPE-26	22	37	41	-19	-21	-25
2018 EUROPE-26	32	53	15	+17	n/a	n/a
2016 EUROPE-27	31	46	23	+8	n/a	n/a
2014 EUROPE-26	28	47	25	+3	n/a	n/a
2012 EUROPE-25	21	43	35	-14	n/a	n/a
2010 EUROPE-23	24	44	32	-8	n/a	n/a

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

* caution - small sample

CHART 2-16
 FUTURE WORKLOAD PROSPECTS FOR 2021



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

A very substantial proportion of staff working in private practices have experienced major changes to their working hours as a result of the Covid-19 pandemic. Since March, 3.4 per cent of private practice staff have been made redundant from Europe's practices. This is a significant proportion. The highest rates are reported by practices in

Slovenia, Hungary (small sample) and Portugal. Nearly 4 per cent of practice staff including 11 per cent in the United Kingdom - have stopped work completely but remain employed by the practice. This includes where the salary is paid for by the Government. A very substantial proportion of staff - one in five - is working fewer hours.

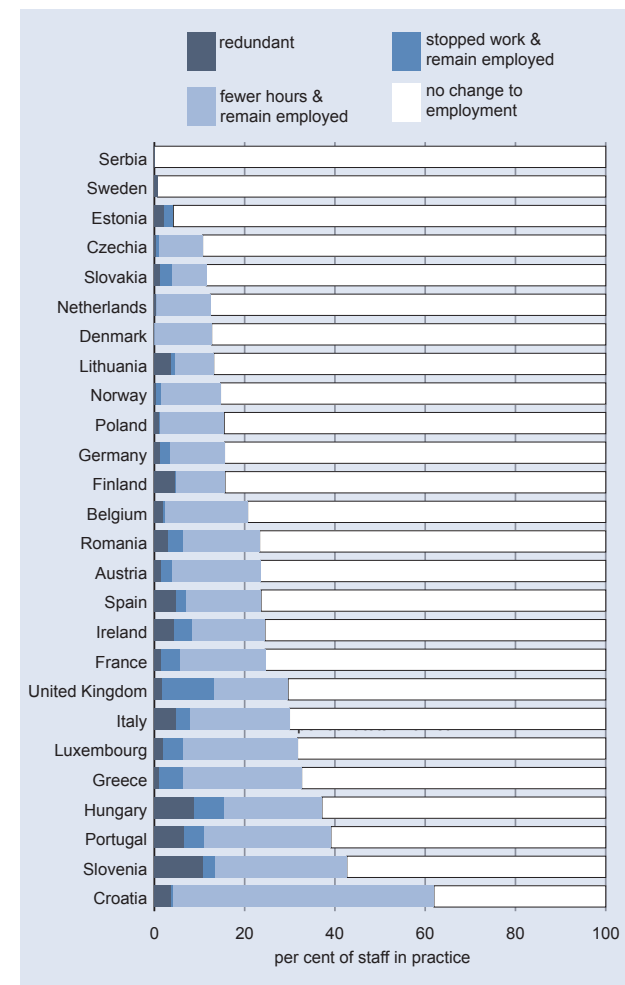
The remaining 72 per cent of private practice staff remain employed as usual although this figure includes the substantial number of Sole Principals and Partners & Directors in smaller practices who would be expected to remain employed as normal in any circumstances.

TABLE 2-10
IMPACT OF COVID-19 ON PRACTICE STAFFING ANALYSED BY COUNTRY

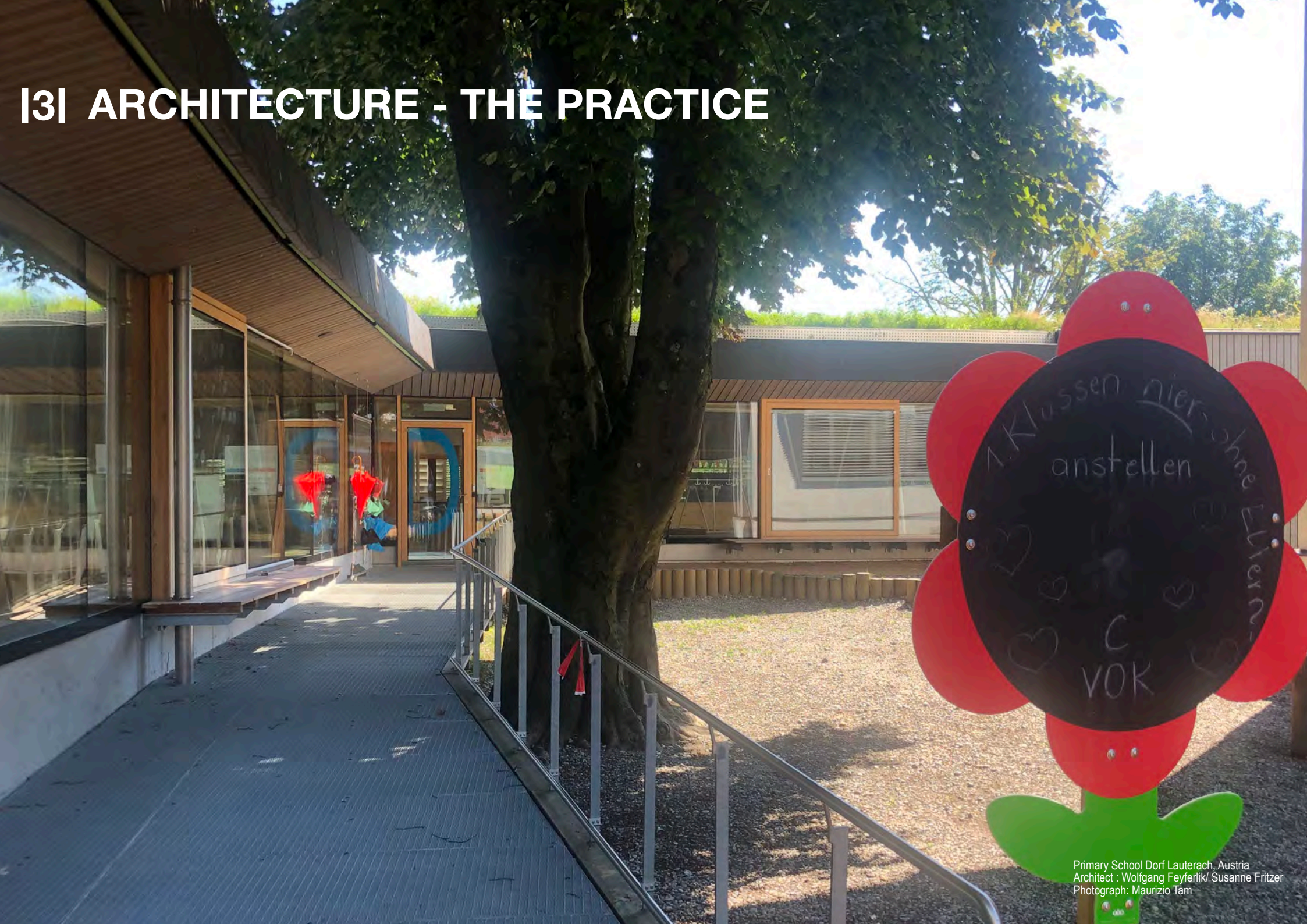
per cent	per cent of practice staff who have since 01 March 2020 ...		
	been made redundant/ been released from a contract	stopped work completely but remain employed by the practice	working fewer hours but remain employed by the practice
Austria	1.5	2.3	19.7
Belgium*	1.8	0.4	18.4
Croatia	3.6	0.5	57.8
Czechia	0.4	0.6	9.7
Denmark	0.0	0.0	12.7
Estonia*	2.0	2.0	0.2
Finland	4.7	0.1	11.0
France	1.4	4.3	18.9
Germany	1.2	2.4	12.0
Greece	1.0	5.2	26.4
Hungary*	8.8	6.5	21.9
Ireland	4.2	4.2	16.1
Italy	4.7	3.2	22.0
Lithuania*	3.7	0.7	8.7
Luxembourg	1.8	4.5	25.4
Netherlands*	0.4	0.0	12.0
Norway	0.3	1.0	13.3
Poland*	1.1	0.1	14.3
Portugal	6.5	4.6	28.0
Romania	3.1	3.2	17.0
Serbia*	0.0	0.0	0.0
Slovakia	1.3	2.6	7.6
Slovenia	10.7	2.8	29.2
Spain	4.8	2.2	16.6
Sweden	0.7	0.0	0.0
United Kingdom	1.8	11.4	16.5
2020 EUROPE-26	3.4	3.9	20.5
<i>2018 and earlier</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>

* caution - small sample

CHART 2-17
IMPACT OF COVID-19 ON PRACTICE STAFFING



|3| ARCHITECTURE - THE PRACTICE



CHAPTER 3 - SUMMARY



111 000

Total number of practices



€253 000

Average revenue per practice
3-5 staff size



€79

Hourly rate for Partners & Directors



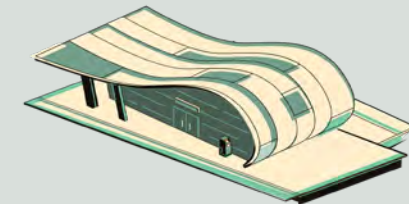
7%

Of practices work
in another European country
last 12 months



13%

Offer Post Occupancy Evaluation



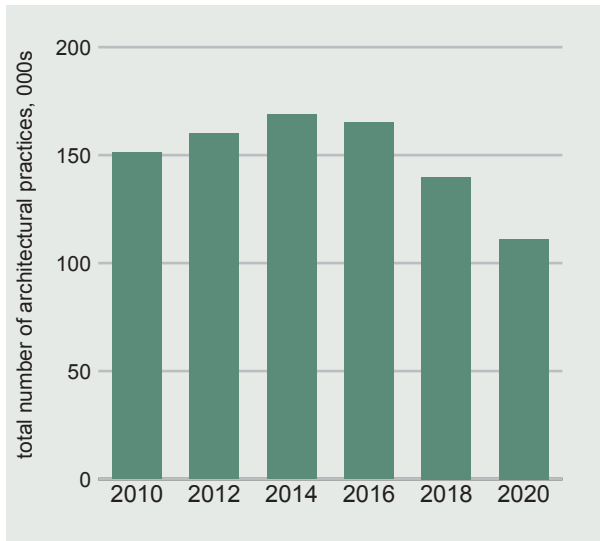
30%

Success rate for public sector
Architectural Design Competitions

3.1 PROFILE OF ARCHITECTURAL PRACTICES

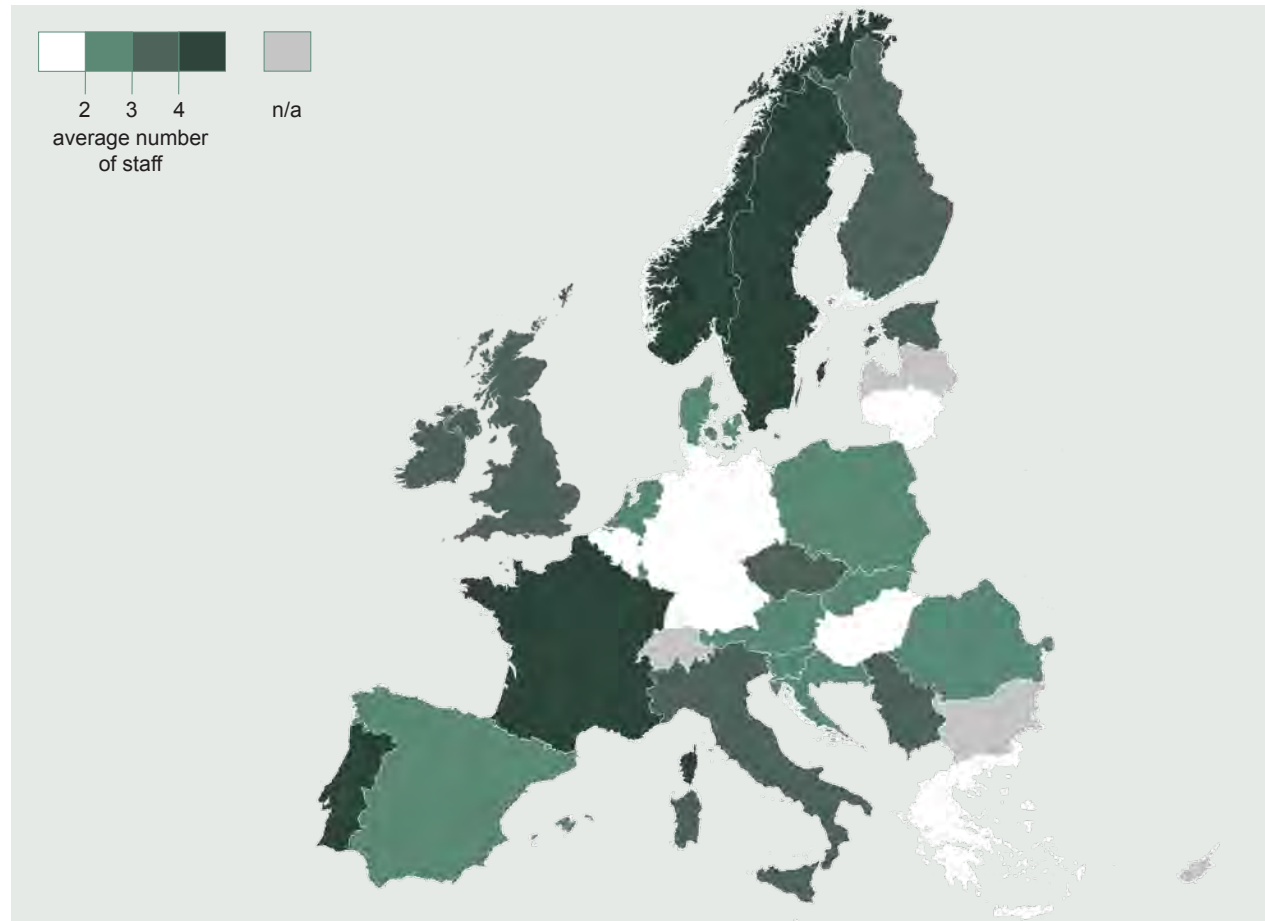
The fall in the number of practices seen in the 2018 survey has continued in 2020. This changing dynamic reflects the economic cycle; during and after recessions we typically see large number of new practices being established. As the economy strengthens, these practices merge or become larger. Most of the drop in practice numbers is due to there being fewer one or two person practices, whose owners may have returned to work in larger practices or whose practices have grown organically.

CHART 3-1
CHANGE IN ESTIMATED NUMBER OF PRACTICES IN EUROPE-31 2010 TO 2020



Architectural practices this year remain strongly skewed towards the smallest size groups; almost two thirds are 1 person practices. However, at the other end of the size range there are about twice as many practices with more than 30 staff than there were two years ago. Furthermore, more architects are employed in these largest practices; the proportion has grown from 11 per cent in 2018 to 18 per cent now.

CHART 3-2
AVERAGE SIZE OF ARCHITECTURAL PRACTICES



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

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

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	1343	355	285	103	27	2	1	2116
Belgium*	3302	387	348	136	42	20	3	4238
Croatia	441	156	169	49	15	0	1	831
Czechia	264	198	323	38	29	0	0	850
Denmark	997	165	330	97	69	6	3	1667
Estonia*	74	10	11	4	6	1	1	106
Finland	309	103	165	48	23	0	1	649
France	2437	771	801	376	256	35	30	4708
Germany	21302	3808	2558	649	147	20	8	28492
Greece	4817	680	463	103	32	2	1	6097
Hungary*	659	163	111	24	14	2	1	973
Ireland	312	137	123	54	22	5	1	653
Italy	16286	3776	3836	1110	863	170	92	26134
Lithuania*	346	39	30	6	2	0	0	423
Luxembourg	169	48	59	24	7	1	0	308
Netherlands*	1859	223	434	143	95	8	10	2772
Norway	207	166	116	93	25	12	2	620
Poland*	2690	768	394	125	75	13	6	4070
Portugal	1449	167	446	188	270	12	29	2562
Romania	1330	391	593	110	85	0	5	2514
Serbia*	969	304	396	105	46	9	6	1835
Slovakia	168	123	85	25	6	1	1	409
Slovenia	257	71	88	28	3	0	0	447
Spain	4386	2207	1429	502	39	3	1	8567
Sweden	607	121	100	48	31	6	8	923
United Kingdom	5158	1177	1165	341	232	92	59	8224
2020 EUR-26	72138	16517	14857	4530	2460	419	270	111187
per cent of practices	65	15	13	4	2	<1	<1	100
2018 EUR-26	94129	18158	14910	4069	1724	228	139	133354
2016 EUR-27	114247	21319	16706	4243	1516	202	108	158342
2014 EUR-26	120242	22423	16066	3151	1069	100	30	163078
2012 EUR-25	98193	28134	22663	5247	1305	151	35	155725
2010 EUR-23	86049	19477	18963	5814	1973	279	83	132643

'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

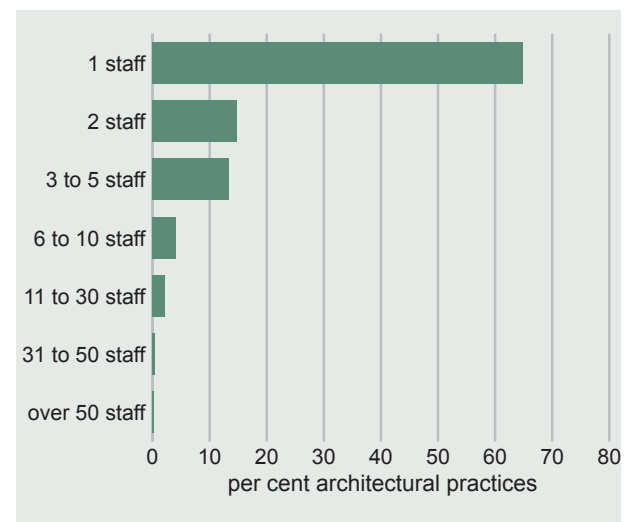
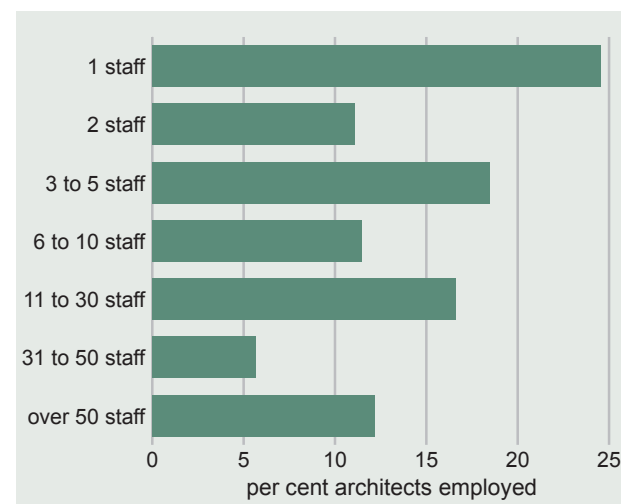


CHART 3-4
PROPORTION OF ARCHITECTS EMPLOYED IN PRACTICES OF DIFFERENT SIZES



3.2 LEGAL FORMATION OF PRACTICES

Almost two thirds of practices consider themselves to be independent architects, essentially trading as Sole Traders. The remaining third operate mainly as limited companies (17 per cent of all practices) or partnerships (11 per cent). The proportion of practices which are independent architects is very similar to that recorded in previous surveys. However, the proportion which are limited companies has been falling and is this year the lowest proportion ever recorded. Conversely, the proportion of practices which are partnerships is the highest recorded since 2010, notable increases are seen this year in Germany and Spain.

CHART 3-5
TYPE OF ARCHITECTURAL BUSINESSES

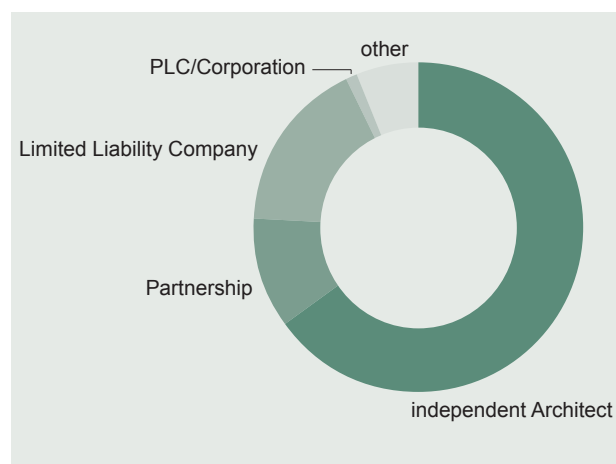


TABLE 3-2
LEGAL FORMATION OF ARCHITECTURAL PRACTICES - BASED ON TYPE OF PRACTICE
IN WHICH PRINCIPALS WORK

per cent	independent architect	partnership	limited company	PLC (public limited company) / corporation	other
Austria	41	2	31	0	25
Belgium*	n/a	n/a	n/a	n/a	n/a
Croatia	21	5	74	0	0
Czechia	22	22	37	2	18
Denmark	39	22	17	0	22
Estonia*	0	0	100	0	0
Finland	25	2	65	0	9
France	61	2	25	6	6
Germany	69	21	9	0	1
Greece	89	4	0	2	4
Hungary*	45	0	41	0	14
Ireland	43	8	43	3	3
Italy	84	5	4	0	6
Lithuania*	25	0	38	0	38
Luxembourg	25	0	51	11	13
Netherlands*	60	37	3	0	0
Norway	20	20	41	4	15
Poland*	64	6	17	0	14
Portugal	50	4	41	0	5
Romania	31	5	56	2	6
Serbia*	100	0	0	0	0
Slovakia	42	1	52	1	4
Slovenia	57	2	41	0	0
Spain	68	12	11	0	9
Sweden	18	3	70	2	8
United Kingdom	41	3	41	1	14
2020 EUROPE-26	65	11	17	1	6
2018 EUROPE-26	64	7	20	2	7
2016 EUROPE-27	52	10	36	2	0
2014 EUROPE-26	65	9	21	4	1
2012 EUROPE-25	67	9	21	2	1
2010 EUROPE-23	51	10	31	5	2

* caution - small sample

3.3 PRACTICE TURNOVER

Turnover relates to the revenue earned by practices, measured before tax. The average turnover per practice rises in line with practice size, which is why average turnover is reported for a variety of practice sizes rather than as a single figure. There is less information for the largest practice size groups due to smaller sample sizes and there is also more variation within these size groups.

Compared with the previous survey, average practice turnover has increased in all but the very largest and very smallest size groups. Over the two years, average turnover for practices with between 3 and 30 staff has increased by between 11 and 15 per cent. Average turnover for 1 person practices is lower by 2 per cent. This year's rises continue the longer-term pattern of rising average turnover values for most size groups. The last survey saw a particularly large increase in the 1 person size group which may account for this year's small fall there. Average turnover values for the very largest size groups are affected by variability in the composition of the survey respondents so it is not surprising that average turnovers there are less likely to show a consistent pattern.

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

€	average (mean) turnover: size of practice (number of architectural staff)						
	1	2	3 to 5	6 to 10	11 to 30	31 to 50	51+
Austria	68 911	114 795	278 678	712 736	1 704 832	n/a	n/a
Belgium*	59 869	110 702	256 517	358 000	n/a	n/a	n/a
Croatia	16 935	34 416	117 584	n/a	n/a	n/a	n/a
Czechia	21 721	30 118	101 989	184 213	n/a	n/a	n/a
Denmark	52 815	68 485	n/a	n/a	n/a	n/a	n/a
Estonia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	69 469	105 643	163 704	714 173	2 424 667	n/a	n/a
France	59 548	133 002	245 400	804 667	1 837 176	n/a	n/a
Germany	95 824	169 809	374 237	811 537	1 444 585	5 187 507	11 495 214
Greece	12 406	37 500	88 167	n/a	n/a	n/a	n/a
Hungary*	15 673	n/a	98 691	n/a	n/a	n/a	n/a
Ireland	57 538	109 358	329 445	665 332	1 665 831	n/a	n/a
Italy	32 747	76 913	115 783	385 514	n/a	2 146 400	6 888 400
Lithuania*	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg	84 542	140 569	292 000	574 571	1 359 500	n/a	n/a
Netherlands*	66 643	140 766	n/a	n/a	n/a	n/a	n/a
Norway	48 476	n/a	n/a	n/a	2 017 225	n/a	n/a
Poland*	27 698	29 096	112 801	132 786	n/a	n/a	n/a
Portugal	20 418	53 628	103 943	294 549	629 710	n/a	n/a
Romania	23 457	30 419	80 404	128 313	n/a	n/a	n/a
Serbia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Slovakia	26 601	32 875	89 451	214 423	n/a	n/a	n/a
Slovenia	55 293	50 346	135 000	n/a	n/a	n/a	n/a
Spain	29 881	63 453	108 500	213 000	n/a	n/a	n/a
Sweden	45 963	66 180	330 545	801 321	2 123 115	4 174 949	26 207 906
United Kingdom	42 780	100 255	151 510	655 326	1 888 359	n/a	n/a
2020 EUR-26	64 946	122 130	253 441	634 732	1 559 226	4 109 345	14 223 314
<i>2018 EUR-26</i>	<i>66 180</i>	<i>115 601</i>	<i>228 107</i>	<i>554 285</i>	<i>1 364 204</i>	<i>2 555 257</i>	<i>18 655 138</i>
<i>2016 EUR-27</i>	<i>48 025</i>	<i>117 358</i>	<i>218 397</i>	<i>551 141</i>	<i>1 758 965</i>	<i>5 710 433</i>	<i>12 133 689</i>
<i>2014 EUR-26</i>	<i>40 646</i>	<i>87 651</i>	<i>169 450</i>	<i>520 474</i>	<i>1 743 964</i>	<i>9 309 970</i>	<i>15 570 115</i>
<i>2012 EUR-25</i>	<i>41 755</i>	<i>78 648</i>	<i>166 607</i>	<i>437 493</i>	<i>1 397 166</i>	<i>3 626 922</i>	<i>16 538 301</i>
<i>2010 EUR-23</i>	<i>48 295</i>	<i>93 826</i>	<i>192 685</i>	<i>463 320</i>	<i>1 167 050</i>	<i>3 471 360</i>	<i>10 613 801</i>

* caution - small sample

Figures are averages (means) and refer to the 12 months ending 01 May 2020 or the year 2019/20 or latest accounting year.

Figures are unadjusted for PPP.

Turnover excludes VAT.

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

3.4 HOW PRACTICES CHARGE FOR THEIR SERVICES

Architects use a range of methods to calculate how much to charge for services offered. Around 30 per cent of jobs are charged as a 'lump sum' or fixed price. This is a particularly common method among architects in Greece, Czechia, Slovenia, Ireland and the United Kingdom.

Nearly as many jobs are charged on the basis of a percentage of the job's contract value. This method is used for a majority of jobs in France, Austria and Luxembourg. Fewer jobs, 15 per cent, are charged based on an hourly charge although in Norway and Sweden this method is used for a majority of jobs.

Only a small proportion of jobs are undertaken at risk, with no charge agreed prior to commencing work. The country with the highest proportion of jobs which are not charged for is Croatia. Nearly one quarter of jobs are charged for using 'other' methods. In the case of Germany, this includes the official scale of fees for architects.

TABLE 3-4
HOW CHARGES ARE CALCULATED

per cent current jobs	method of calculating charge				
	per cent of contract value	lump sum	hourly charge	no charge agreed (effectively "at risk")	other method
Austria	56	19	22	2	2
Belgium*	41	27	27	2	4
Croatia	17	33	7	15	29
Czechia	32	46	16	1	5
Denmark	22	28	43	1	7
Estonia*	0	76	22	1	1
Finland	10	36	41	3	11
France	62	26	6	1	5
Germany	5	9	21	2	63
Greece	31	51	3	2	12
Hungary*	51	30	9	1	9
Ireland	33	47	12	2	6
Italy	36	38	6	6	12
Lithuania*	26	24	24	0	26
Luxembourg	52	22	13	1	12
Netherlands*	6	52	32	2	8
Norway	5	32	58	0	5
Poland*	30	25	23	3	19
Portugal	35	39	7	4	15
Romania	20	37	14	3	26
Serbia*	7	17	33	0	43
Slovakia	37	31	16	5	12
Slovenia	32	41	11	3	14
Spain	45	29	5	6	14
Sweden	1	29	65	1	4
United Kingdom	27	44	21	2	7
2020 EUROPE-26	28	30	15	4	23
2018 EUROPE-26	32	28	13	3	25
2016 EUROPE-27	45	34	14	7	n/a
2014 EUROPE-26	47	32	14	7	n/a
2012 EUROPE-25	43	36	12	9	n/a
2010 EUROPE-23	49	29	18	5	n/a

* caution - small sample

** includes HOAI Official Scale of Fees for architects established in Germany

3.5 HOURLY CHARGE-OUT RATES

There is a very wide variation in the average hourly charge-out rates reported by architects. Even adjusting for PPP, the hourly charge-out rates for Principals vary from around €20 to over €80 per hour. Nevertheless, recent rises in reported rates - both adjusted and unadjusted - have continued in the latest period so the 2020 average hourly rates figures for Europe overall are the highest reported in the last ten years. Average rates for Principals (adjusted for PPP) have increased by 20 per cent since 2010.

CHART 3-6
 AVERAGE HOURLY CHARGE-OUT RATES FOR PRINCIPALS ADJUSTED FOR PPP

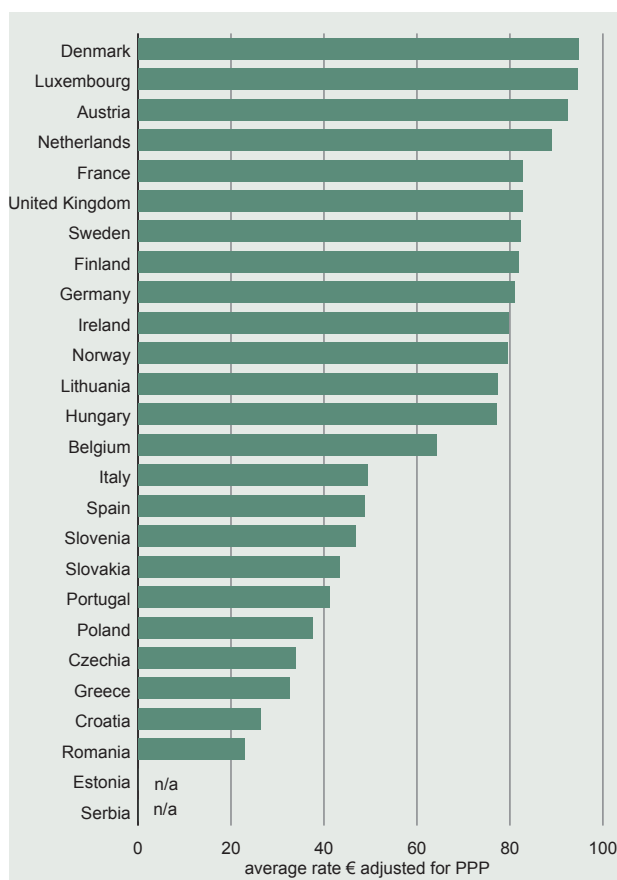


TABLE 3-5
 AVERAGE HOURLY CHARGE-OUT RATES ADJUSTED TO TAKE ACCOUNT OF PURCHASING POWER PARITY (PPP)

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

€	average (median) hourly charge-out rates					
	adjusted for PPP			unadjusted for PPP		
	principals	architect employees	technologists	principals	architect employees	technologists
Austria	92	83	69	100	90	75
Belgium*	64	61	50	71	70	55
Croatia	26	20	20	20	13	13
Czechia	34	23	20	23	16	14
Denmark	95	81	74	134	114	104
Estonia*	n/a	n/a	n/a	n/a	n/a	n/a
Finland	82	65	53	95	78	60
France	83	74	55	85	80	60
Germany	81	67	52	85	70	55
Greece	33	18	18	30	20	20
Hungary*	77	62	26	48	38	16
Ireland	80	64	48	100	80	60
Italy	49	35	30	40	35	30
Lithuania*	77	46	31	50	30	20
Luxembourg	95	68	51	120	85	65
Netherlands*	89	76	58	100	85	65
Norway	79	76	69	113	108	98
Poland*	38	17	13	21	9	7
Portugal	41	29	29	35	25	25
Romania	23	15	10	11	11	5
Serbia*	n/a	n/a	n/a	n/a	n/a	n/a
Slovakia	43	29	22	30	20	15
Slovenia	47	35	26	40	30	20
Spain	49	31	27	45	29	25
Sweden	82	71	63	103	90	80
United Kingdom	83	73	54	96	85	62
2020 EUROPE-26	79	62	52	84	65	55
2018 EUROPE-26	74	62	49	80	65	51
2016 EUROPE-27	70	57	45	75	60	46
2014 EUROPE-26	64	53	43	67	55	45
2012 EUROPE-25	54	44	29	55	43	30
2010 EUROPE-23	66	56	43	75	63	50

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

3.6 TURNOVER FROM OUTSIDE OWN COUNTRY

In a new question for the 2020 survey, architects report that 3 per cent of their practice turnover comes from international work, defined as being work on jobs located outside the practice's own country. Seven per cent of practices are involved in international work, most undertaking jobs in other parts of Europe but the range of job locations is truly worldwide.

CHART 3-7
ORIGIN OF INTERNATIONAL WORK

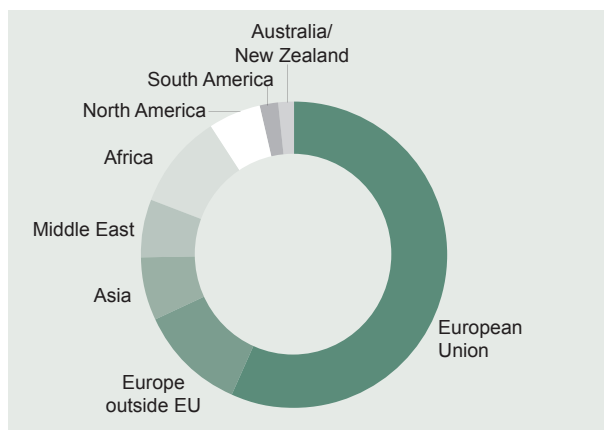


TABLE 3-7
TURNOVER SHARE AND INVOLVEMENT
IN INTERNATIONAL WORK

per cent	per cent of market	per cent of practices involved
own country	97	99
other EU country	2	6
other Europe outside EU	<1	1
Asia	<1	1
Middle East	<1	1
Africa	<1	1
North America	<1	1
South America	<1	<1
Australia/New Zealand	<1	<1

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

TABLE 3-6
PROPORTION OF PRACTICE TURNOVER DERIVED FROM OUTSIDE THE COUNTRY ANALYSED BY COUNTRY

per cent	own country	other EU country	other Europe outside EU	Asia	Middle East	Africa	North America	South America	Australia/New Zealand	TOTAL
Austria	96	2	1	0	0	0	0	0	0	100
Belgium*	94	5	0	1	0	0	0	0	0	100
Croatia	95	3	0	0	0	1	0	0	1	100
Czechia	98	1	1	0	0	0	0	0	0	100
Denmark	93	6	0	0	0	0	0	0	0	100
Estonia*	100	0	0	0	0	0	0	0	0	100
Finland	99	0	0	0	0	0	0	0	0	100
France	98	1	0	0	0	0	0	0	0	100
Germany	98	1	0	0	0	0	0	0	0	100
Greece	96	1	0	1	0	0	1	0	0	100
Hungary*	94	0	6	0	0	0	0	0	0	100
Ireland	95	3	1	0	0	0	0	0	1	100
Italy	97	1	0	0	0	0	0	0	0	100
Lithuania*	84	16	0	0	0	0	0	0	0	100
Luxembourg	89	10	0	0	0	1	0	0	0	100
Netherlands*	98	1	0	1	0	0	0	0	0	100
Norway	96	2	1	0	0	0	0	0	1	100
Poland*	99	1	0	0	0	0	0	0	0	100
Portugal	93	3	0	0	1	2	1	0	0	100
Romania	97	2	0	0	0	0	0	0	0	100
Serbia*	100	0	0	0	0	0	0	0	0	100
Slovakia	96	4	0	0	0	0	0	0	0	100
Slovenia	94	5	1	0	0	0	0	0	0	100
Spain	100	0	0	0	0	0	0	0	0	100
Sweden	99	1	0	0	0	0	0	0	0	100
United Kingdom	95	2	0	0	2	0	1	0	0	100
2020 EUR-26	97	2	<1	<1	<1	<1	<1	<1	<1	100
2018 EUR-26	95.8	2.8				1.4				100
2016 EUR-27	95.7	2.7				1.6				100
2014 EUR-26	93.6	3.7				2.7				100
2012 EUR-25	94.4	n/a				n/a				100
2010 EUR-23	92.3	n/a				n/a				100

* caution - small sample

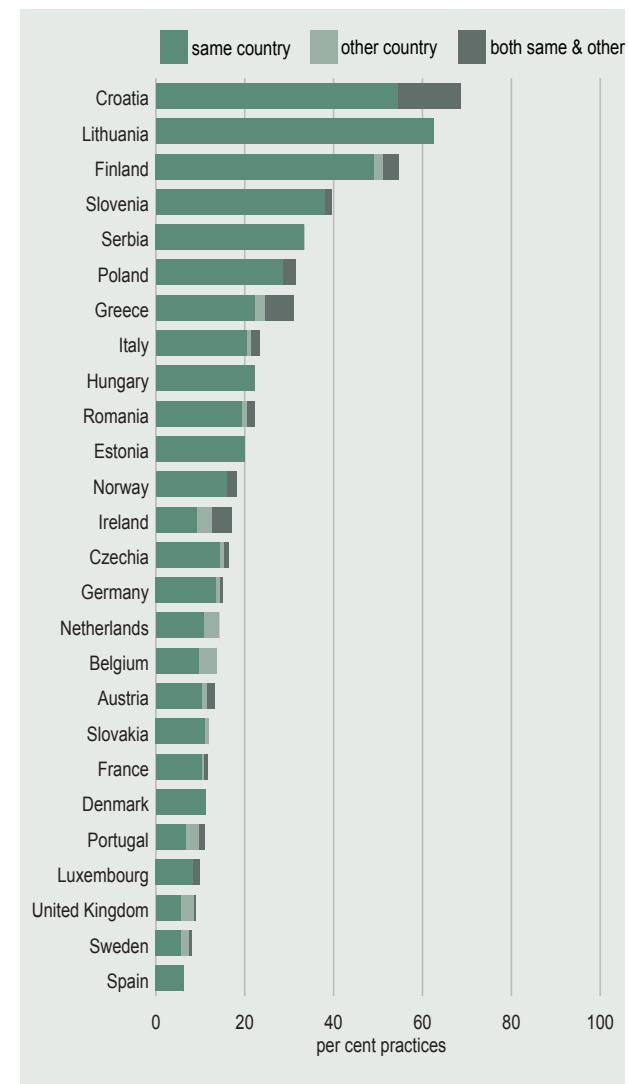
3.7 ASSOCIATIONS

TABLE 3-8
PROPORTION OF PRACTICES HAVING A FORMAL ASSOCIATION WITH ANOTHER PRACTICE

per cent	no formal association			have a formal association	
	no formal association	with architect / practice in same country	with architect / practice in another country	both	
Austria	87	10	1	2	
Belgium*	86	10	4	0	
Croatia	31	54	0	14	
Czechia	84	14	1	1	
Denmark	89	11	0	0	
Estonia*	80	20	0	0	
Finland	45	49	2	4	
France	88	10	0	1	
Germany	85	14	1	1	
Greece	69	22	2	7	
Hungary*	78	22	0	0	
Ireland	83	9	3	5	
Italy	77	20	1	2	
Lithuania*	38	63	0	0	
Luxembourg	90	8	0	1	
Netherlands*	86	11	4	0	
Norway	82	16	0	2	
Poland*	69	29	0	3	
Portugal	89	7	3	1	
Romania	78	19	1	2	
Serbia*	67	33	0	0	
Slovakia	88	11	1	0	
Slovenia	60	38	0	2	
Spain	94	6	0	0	
Sweden	92	6	2	1	
United Kingdom	91	6	3	1	
2020 EUROPE-26	82	15	1	1	
2018 EUROPE-26	83	15	1	1	
2016 EUROPE-27	80	17	2	1	
2014 EUROPE-26	84	14	2	1	
2012 EUROPE-25	79	18	2	1	
2010 EUROPE-23	82	15	2	2	

* caution - small sample

CHART 3-8
PROPORTION OF PRACTICES HAVING A FORMAL ASSOCIATION WITH ANOTHER PRACTICE



3.7 ASSOCIATIONS (continued)

Overall, 18 per cent of practices in Europe have an association with another practice (table 3-9). In most cases, this is an association with a practice in the same country. About half or more architects in Finland, Croatia and Lithuania (small sample) have an association with another practice in the same country. At least 8 per cent of architects in Croatia, Greece and Ireland have an association with an architectural practice in another country.

3.8 BRANCH OFFICES

A relatively small proportion of architects work in a branch office. The proportion is 5 per cent, similar to previous years. More architects from Norway, Serbia (small sample), Denmark and Sweden work in a branch office than elsewhere.

It remains the case that for nearly all, 86 per cent, of architects who work in a branch office, the head office is located in the same country as the branch office and the same country as where the architect is established. However, this proportion has been falling steadily since 2014, when the proportion was 96 per cent.

TABLE 3-9
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 office head office is located in...	
		same country as where branch office is located	same country as where architect is established
Austria	2	83	100
Belgium*	9	87	86
Croatia	7	89	87
Czechia	6	81	81
Denmark	13	74	80
Estonia*	0	100	100
Finland	8	71	60
France	3	93	96
Germany	5	74	73
Greece	4	97	95
Hungary*	11	83	100
Ireland	10	94	92
Italy	2	97	95
Lithuania*	8	100	100
Luxembourg	6	71	69
Netherlands*	4	57	50
Norway	16	73	72
Poland*	6	73	80
Portugal	10	90	85
Romania	6	79	70
Serbia*	14	58	100
Slovakia	7	86	88
Slovenia	1	100	100
Spain	4	63	69
Sweden	12	59	59
United Kingdom	11	93	95
2020 EUROPE-26	5	86	86
2018 EUROPE-26	6	91	90
2016 EUROPE-27	6	95	95
2014 EUROPE-26	6	96	96
2012 EUROPE-25	6	90	91
2010 EUROPE-23	12	89	98

* caution - small sample

3.9 PUBLIC BIDS & ARCHITECTURAL DESIGN COMPETITIONS

Only a minority of practices participate in Architectural Design competitions. This year's proportion of 13 per cent is very similar to the 2018 figure. Competitions with a pre-selection procedure are the most likely to be entered, followed by open competitions and invited competitions. But significantly, out of all competitions entered, about three quarters are public sector competitions.

Competition success rates are 30 per cent for public sector competitions and 44 per cent for private sector. Success rates for both sectors have fallen compared with the previous survey. There is considerable variation in the success rates recorded by architects in different countries, and several countries report public sector competition success rates in excess of 50 per cent. Practices invested a considerable amount of time preparing competition entries, averaging 300 hours per practice amongst those who entered.

Practices made, on average, 0.9 bids for projects advertised in the OJEU during the past year. This is very similar to the figure reported in the 2018 survey. A majority of architects said that they had experienced difficulties as part of the bidding process for OJEU advertised projects. More than one in three architects felt the process was too onerous or that they did not fulfil the minimum turnover threshold. More than 30 per cent thought the bidding process was too costly, or that they had insufficient past experience. One in five felt the timetable was too tight and nearly as many thought the tender documentation was not sufficiently clear.

CHART 3-9
PRACTICES ENTERING ARCHITECTURAL DESIGN COMPETITIONS LAST 12 MONTHS

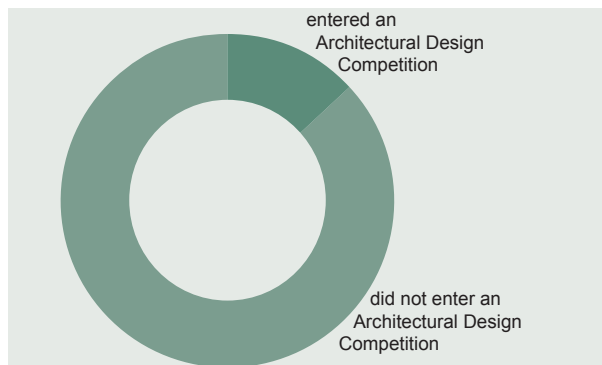


CHART 3-10
DIFFICULTIES EXPERIENCED BY PRACTICES IN THE OJEU BIDDING PROCESS

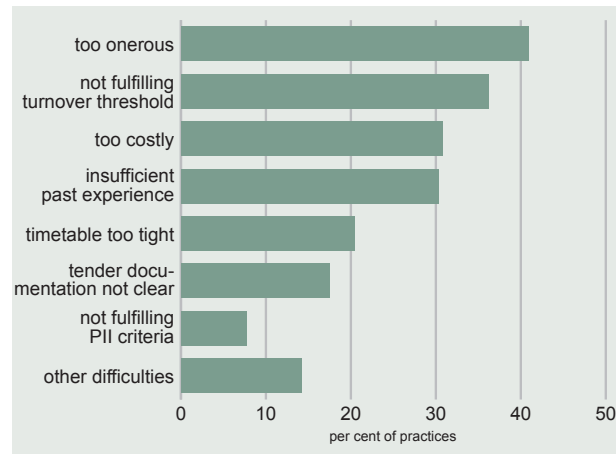


CHART 3-11
ARCHITECTURAL DESIGN COMPETITIONS ENTERED LAST 12 MONTHS - SUCCESS RATES

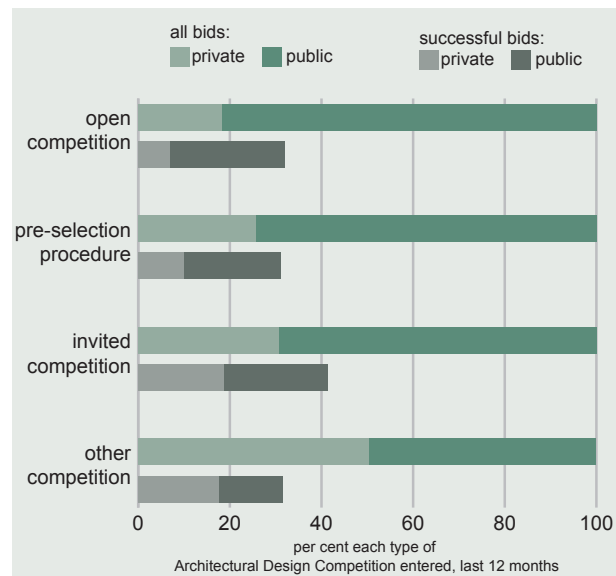


TABLE 3-10
ENTERING ARCHITECTURAL DESIGN COMPETITIONS AND BIDDING FOR PROJECTS ADVERTISED IN OJEU

per cent / number	% practices participating in Architectural Design Competition	average number of bids for OJEU projects
Austria	27	1.1
Belgium*	18	1.4
Croatia	3	0.2
Czechia	9	0.2
Denmark	6	0.1
Estonia*	20	0.2
Finland	22	0.6
France	18	2.1
Germany	13	0.8
Greece	4	0.8
Hungary*	22	0.9
Ireland	29	3.8
Italy	12	0.8
Lithuania*	33	1.0
Luxembourg	22	1.5
Netherlands*	7	2.2
Norway	18	0.9
Poland*	33	9.1
Portugal	4	0.1
Romania	3	0.1
Serbia*	0	0.0
Slovakia	11	0.7
Slovenia	14	0.3
Spain	17	0.4
Sweden	20	3.2
United Kingdom	13	0.8
2020 EUROPE-26	13	0.9
2018 EUROPE-26	12	2.3
2016 EUROPE-27	20	n/a
2014 EUROPE-26	n/a	n/a
2012 EUROPE-25	n/a	n/a
2010 EUROPE-23	n/a	n/a

* caution - small sample

TABLE 3-11
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	34	27	33	5	100	77	23
Belgium*	11	41	40	8	100	78	22
Croatia	12	44	41	4	100	7	93
Czechia	53	9	21	17	100	63	37
Denmark	27	9	18	45	100	45	55
Estonia*	91	0	9	0	100	91	9
Finland	55	19	19	7	100	77	23
France	36	43	3	18	100	75	25
Germany	28	45	21	7	100	82	18
Greece	50	25	25	0	100	75	25
Hungary*	37	19	44	0	100	30	70
Ireland	25	34	36	5	100	51	49
Italy	48	14	13	25	100	83	17
Lithuania*	50	21	29	0	100	57	43
Luxembourg	32	43	17	8	100	80	20
Netherlands*	5	33	60	2	100	22	78
Norway	20	47	27	7	100	70	30
Poland*	19	0	33	48	100	43	57
Portugal	29	12	49	10	100	58	42
Romania	51	9	9	31	100	53	47
Serbia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Slovakia	56	9	32	3	100	79	21
Slovenia	67	7	13	13	100	77	23
Spain	61	22	17	0	100	83	17
Sweden	12	23	54	11	100	78	22
United Kingdom	34	22	34	11	100	40	60
2020 EUROPE-26	28	38	25	10	100	73	27
2018 EUROPE-26	15	63	17	5	100	63	37
2016 EUROPE-27	36	28	24	12	100	73	27
2014 EUROPE-26	n/a	n/a	n/a	n/a	n/a	82	18
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a	n/a	n/a

* caution - small sample

TABLE 3-12
ARCHITECTURAL DESIGN COMPETITION
SUCCESS RATES

per cent	Architectural Design Competitions entered last 12 months	
	success rate - public	success rate - private
Austria	31	35
Belgium*	46	42
Croatia	88	28
Czechia	30	81
Denmark	60	83
Estonia*	30	0
Finland	37	50
France	24	10
Germany	34	42
Greece	33	n/a
Hungary*	75	63
Ireland	27	52
Italy	35	39
Lithuania*	38	67
Luxembourg	33	18
Netherlands*	54	80
Norway	26	58
Poland*	50	62
Portugal	57	75
Romania	79	79
Serbia*	n/a	n/a
Slovakia	27	63
Slovenia	32	67
Spain	64	48
Sweden	32	42
United Kingdom	21	65
2020 EUROPE-26	30	44
2018 EUROPE-26	43	58
2016 EUROPE-27	31	48
2014 EUROPE-26	n/a	n/a
2012 EUROPE-25	n/a	n/a
2010 EUROPE-23	n/a	n/a

* caution - small sample

TABLE 3-13
 INVESTMENT AND REWARDS: PARTICIPATION IN ARCHITECTURAL DESIGN COMPETITIONS LAST 12 MONTHS ANALYSED BY COUNTRY

average (mean) per practice	all Architectural Design Competitions entered last 12 months				Architectural Design Competition prize money	
	number of hours spent participating in Architectural Design Competitions	average total financial cost** per practice of participating €	average fee turnover per practice from successful Architectural Design Competitions €	average build cost per practice of won projects € million	receive prize money - per cent of ALL practices which were successful at Architectural Design Competitions	average prize money (excluding zero) €
Austria	586	32590	235275	15.2	31	9577
Belgium*	449	15530	174421	4.4	26	5158
Croatia	228	13043	n/a	n/a	25	10797
Czechia	201	4644	22123	8.2	25	7056
Denmark	204	7593	n/a	n/a	n/a	n/a
Estonia*	1188	22125	250000	8.0	67	28500
Finland	333	23386	30286	33.3	24	23117
France	297	28459	269611	15.7	16	20930
Germany	810	51703	961627	44.7	68	60001
Greece	59	15656	n/a	n/a	n/a	n/a
Hungary*	44	1169	598	2.1	25	1138
Ireland	105	11835	606482	20.4	2	769
Italy	53	1580	28043	5.0	9	6000
Lithuania*	402	7750	100000	5.0	40	4000
Luxembourg	819	46160	717333	13.9	24	20636
Netherlands*	688	68792	8333	10.8	11	10000
Norway	676	38897	171156	20.0	14	7733
Poland*	116	2039	249138	0.2	20	3093
Portugal	98	2647	40000	1.4	6	15133
Romania	63	1240	54894	0.9	12	227
Serbia*	30	500	n/a	n/a	100	1000
Slovakia	150	3371	21412	8.9	31	4660
Slovenia	189	5167	61100	5.0	15	4700
Spain	134	6159	24328	2.2	4	23667
Sweden	1070	32262	201744	11.0	14	22364
United Kingdom	35	2320	847233	16.4	2	189
2020 EUROPE-26	297	17490	317263	16.1	19	20507
2018 EUROPE-26	288	14266	217442	11.2	19	17955
2016 EUROPE-27	424	12624	113822	11.6	17	13110
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

* caution - small sample

** includes staff costs

3.10 CERTIFICATION WORK

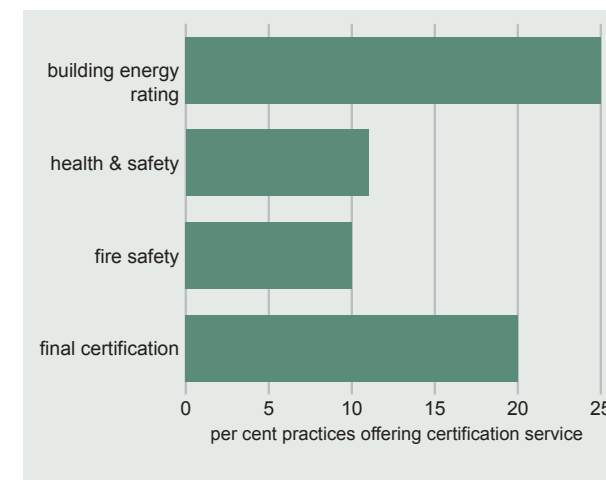
TABLE 3-14
ARCHITECTURAL PRACTICES OFFERING CERTIFICATION SERVICES ANALYSED BY COUNTRY

per cent of practices who offer service	type of certification offered			
	building energy rating	health & safety	fire safety	final certification of whole building
Austria	10	4	2	21
Belgium*	14	3	4	1
Croatia	15	0	5	3
Czechia	17	1	16	11
Denmark	10	0	5	0
Estonia*	0	0	0	0
Finland	0	2	0	5
France	10	3	6	7
Germany	12	10	6	15
Greece	39	13	11	15
Hungary*	23	5	18	5
Ireland	10	22	25	70
Italy	34	13	11	20
Lithuania*	0	0	0	0
Luxembourg	36	4	3	12
Netherlands*	20	17	17	3
Norway	6	6	9	11
Poland*	24	11	14	11
Portugal	18	9	18	13
Romania	17	8	25	12
Serbia*	0	0	0	0
Slovakia	25	0	10	7
Slovenia	10	5	5	7
Spain	78	24	22	61
Sweden	3	6	2	8
United Kingdom	6	4	1	33
2020 EUROPE-26	25	11	10	20
2018 EUROPE-26	41	29	24	37
2016 EUROPE-27	44	26	26	n/a
2014 EUROPE-26	42	24	35	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a

* caution - small sample

The extent to which architects offer certification services appears to vary more between different countries than for any other topic covered in this survey. About one quarter of Europe's architects offer a building energy rating service, ranging between 78 per cent in Spain and zero in several other countries. The final certification of the whole building is offered by 20 per cent of architects but again this varies hugely between countries, ranging from over 50 per cent of architects in Ireland and Spain to below 5 per cent in several countries. Fewer practices, around one in ten, offer fire safety or health and safety certification. Again, practices in Spain and Ireland are amongst those most likely to offer this.

CHART 3-12
CERTIFICATION SERVICES OFFERED



3.11 POST OCCUPANCY EVALUATION (POE)

TABLE 3-15
ARCHITECTURAL PRACTICES OFFERING POE ANALYSED BY COUNTRY

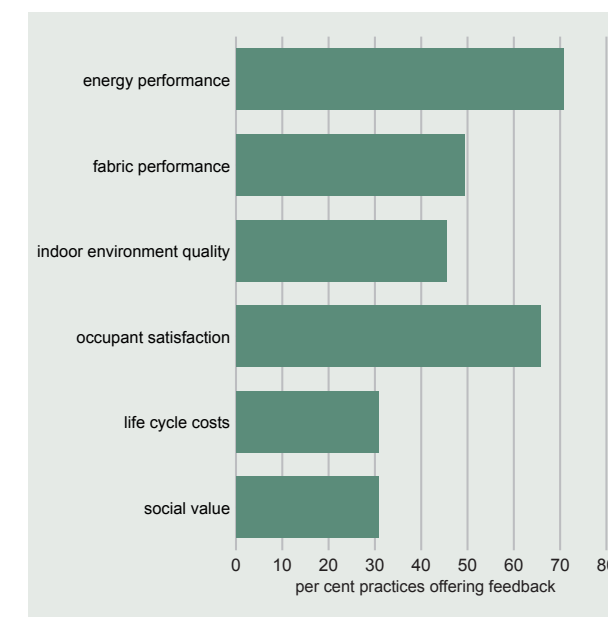
per cent of practices who offer service	offer a Post Occupancy Evaluation	Stage at which architects agreed to undertake the POE:		
		Design phase	Construction phase	after Completion
Austria	14	46	31	23
Belgium*	10	11	11	78
Croatia	6	100	0	0
Czechia	1	67	33	0
Denmark	6	0	0	100
Estonia*	0	n/a	n/a	n/a
Finland	9	20	40	40
France	10	41	7	52
Germany	8	43	18	39
Greece	18	33	17	50
Hungary*	27	25	25	50
Ireland	17	52	4	44
Italy	12	39	25	36
Lithuania*	13	0	100	0
Luxembourg	17	54	8	38
Netherlands*	25	56	0	44
Norway	11	50	0	50
Poland*	13	60	20	20
Portugal	26	22	19	58
Romania	35	28	23	49
Serbia*	0	n/a	n/a	n/a
Slovakia	7	18	45	36
Slovenia	7	56	0	44
Spain	15	30	10	60
Sweden	4	43	14	43
United Kingdom	24	39	9	52
2020 EUROPE-26	13	38	18	45
2018 EUROPE-26	13	n/a	n/a	n/a
2016 EUROPE-27	n/a	n/a	n/a	n/a
2014 EUROPE-26	n/a	n/a	n/a	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a

* caution - small sample

A Post Occupancy Evaluation (POE) makes it possible to find out whether the building performs energetically in the way it was designed by the architect. Thirteen per cent of architects in Europe offer a POE, including a quarter or more of architects in Romania, Hungary, Portugal, the Netherlands and the United Kingdom. Of those architects who do offer a POE, nearly half (45 per cent) made the decision to undertake the POE after completion. Slightly fewer came to an agreement during the Design phase, but far fewer (18 per cent) during the construction phase.

Several different types of feedback are typically included in the POE undertaken by architects. About two thirds of architects say their POEs typically include feedback on energy performance and occupant satisfaction. More than 40 per cent of architects include an analysis of fabric performance and indoor environment quality. But only about 30 per cent of respondents say the POEs they offer typically include feedback on life cycle costs or social value.

CHART 3-13
TYPE OF FEEDBACK TYPICALLY INCLUDED IN POE



14 | ARCHITECTS - THE INDIVIDUAL



Gullkronan Senior Housing
Helsinki, Finland
Architect: Huttunen-Lipasti Architects
Photograph: Maurizio Tami

CHAPTER 4 - SUMMARY



8%

Average earnings have increased



€50 000

Average earnings for Partners & Directors



47

Weekly hours worked
by Partners & Directors



22%

Studied in another country



6%

Worked in another European country
in the last 12 months



20

Hours CPD per year

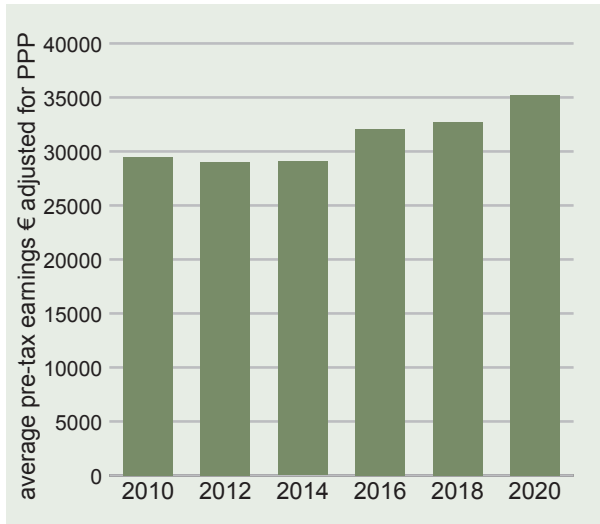
4.1 EARNINGS

Architects' earnings have increased strongly since the last survey, rising by 8 per cent to reach a Europe average of €35,220 (adjusted for PPP). Average earnings are rising across the board in the private sector; Partners & Directors and Freelance architects have seen the largest income growth. This means that average earnings for Partners & Directors has exceeded €50,000 for the first time in this survey.

Average earnings for Sole Principals are higher by 11 per cent and have risen by 12 per cent for salaried architects working in private practice. Sole Principals earn an average €38,225, higher than the €32,006 recorded by private practice salaried architects. The differential in earnings between Partners & Directors and salaried architects in private practice is 36 per cent. Sole Principals earn 24 per cent less than Partners & Directors.

Salaries reported by architects working in the public sector have not increased by as much as in the private sector. Average earnings are up by just 2 per cent but have fallen by 2 per cent for architects in local, regional or central government. This is the only employment field to report falling salaries compared with the 2018 survey.

CHART 4-1
CHANGE IN ALL ARCHITECTS' AVERAGE PRE-TAX EARNINGS (ALL SURVEY COUNTRIES) 2010 TO 2020



AVERAGE EARNINGS ARE ADJUSTED FOR PPP

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

Earnings data are converted from local currencies to Euros using exchange rate as at 01.05.20.

All earnings are before tax.

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

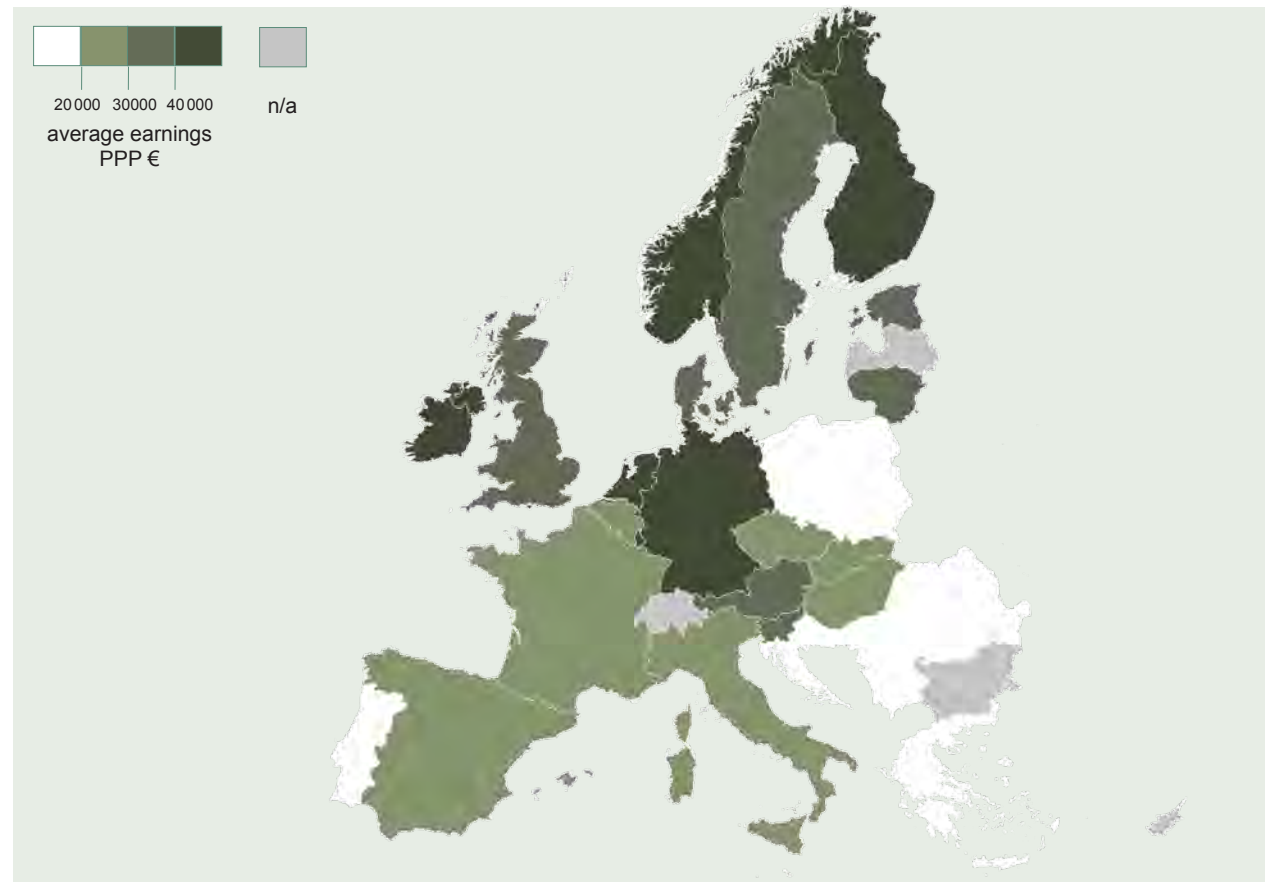


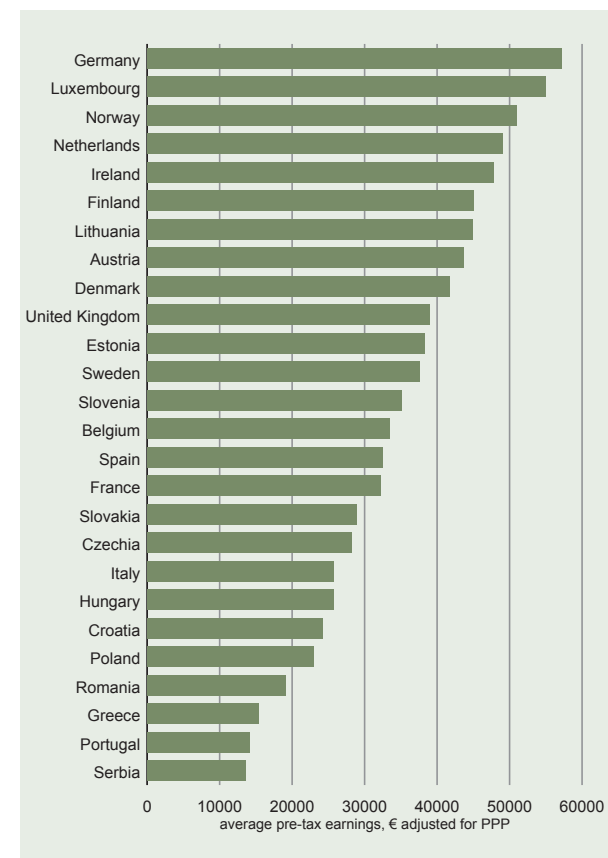
TABLE 4-1
AVERAGE PRE-TAX EARNINGS OF ALL FULL-TIME ARCHITECTS ANALYSED BY COUNTRY

€	average (median) pre-tax earnings 2020		average (median) pre-tax earnings adjusted for PPP				
	adjusted for PPP	unadjusted for PPP	2018	2016	2014	2012	2010
Austria	43629	47500	46168	47529	42095	42174	38925
Belgium*	33424	38500	32520	35481	30192	28354	28384
Croatia	24173	16196	17844	19338	17946	18078	18892
Czechia	28221	19473	27375	17518	13150	19410	21268
Denmark	41736	60398	42684	39478	43187	42543	37843
Estonia*	38217	30000	21401	19947	22215	12776	15318
Finland	45008	55000	41735	41771	40486	38339	35601
France	32169	35000	28998	27986	27498	27326	28871
Germany	57143	60000	54286	n/a	43350	46422	39932
Greece	15421	13000	15421	n/a	16145	18927	20534
Hungary*	25707	17692	20566	19609	n/a	13678	n/a
Ireland	47847	58500	39872	40816	38103	36847	40200
Italy	25717	27000	24728	24777	27132	24248	18779
Lithuania*	44892	29000	20124	n/a	n/a	n/a	10252
Luxembourg	55004	69800	56738	58725	48701	46267	n/a
Netherlands*	48976	56000	44524	39047	54496	n/a	n/a
Norway	50939	72432	46965	n/a	n/a	n/a	n/a
Poland*	22932	12888	15010	17489	n/a	22045	24935
Portugal	14101	12000	14101	14833	13433	13714	n/a
Romania	19048	10000	10273	15274	9822	10844	8172
Serbia*	13619	7000	n/a	n/a	n/a	n/a	n/a
Slovakia	28944	20000	n/a	18018	15581	n/a	16378
Slovenia	35170	30000	28136	24406	19808	17964	29240
Spain	32503	30000	26002	24390	28354	20534	n/a
Sweden	37559	47137	33052	41216	35890	35649	36612
United Kingdom	38916	45376	40862	38871	37582	48242	45922
2020 EUROPE-26** (2018-26 2016-27 2014-26 2012-25 2010-23 2008-17)	35220	36740	32731	32068	29070	29014	29493

* caution - small sample

** The 2020 EUROPE-26 figure is weighted to reflect the total architectural population in all participating countries
 Earnings data converted from local currencies to Euros exchange rate as at 01.05.20

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

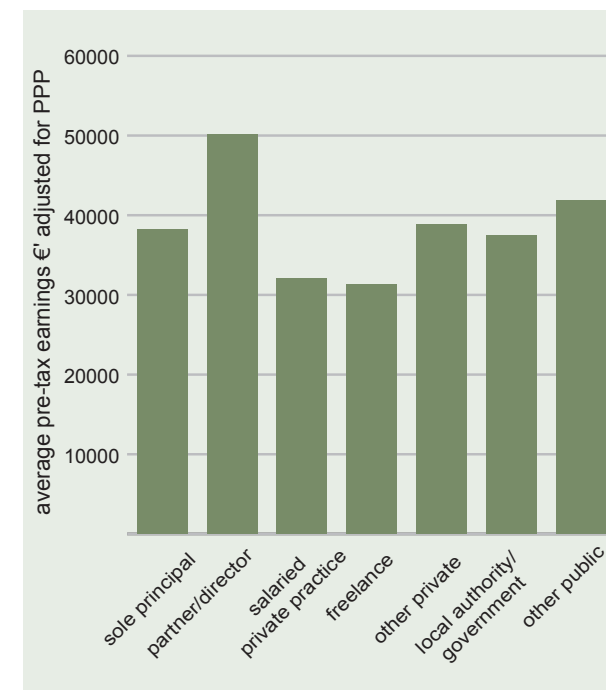


4.2 EARNINGS BY FIELD OF EMPLOYMENT

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

€	average (median) pre-tax earnings adjusted for PPP									
	sole principal	partner/director	ALL Principals	private practice salaried employees	freelance	other private	ALL private	local / central gov't	other public	ALL public
Austria	36934	48753	43629	n/a	n/a	n/a	43860	n/a	n/a	n/a
Belgium*	30435	31617	31165	39140	31481	24842	32656	n/a	n/a	48713
Croatia	27698	28706	27698	20144	n/a	n/a	24173	15551	n/a	28283
Czechia	28221	47130	32172	28983	22577	n/a	28221	32991	33866	33866
Denmark	53593	18497	42684	38814	n/a	64501	39364	47427	20394	42684
Estonia*	n/a	n/a	n/a	n/a	n/a	n/a	47771	n/a	n/a	n/a
Finland	56465	63011	57283	42553	n/a	49100	45807	44190	46236	44190
France	27574	33088	27574	34944	20221	27574	32169	41603	38603	41360
Germany	64810	85714	69524	47619	46667	66667	55238	60952	66667	61683
Greece	17794	26097	17794	14235	11269	n/a	14828	18980	n/a	16607
Hungary*	38818	n/a	39862	n/a	n/a	n/a	31363	n/a	n/a	23651
Ireland	47847	63796	56619	39872	n/a	44258	43860	51834	59609	52632
Italy	29674	44510	29674	24728	21365	24728	26113	24728	28684	25717
Lithuania*	n/a	n/a	n/a	23220	n/a	n/a	44892	n/a	n/a	n/a
Luxembourg	53980	75650	59102	39401	n/a	n/a	55004	n/a	n/a	n/a
Netherlands*	69012	49866	66785	31167	n/a	n/a	49421	n/a	n/a	n/a
Norway	36127	56358	50939	50578	n/a	n/a	50578	50758	54190	51083
Poland*	25017	65462	27310	18763	23266	n/a	22932	n/a	n/a	n/a
Portugal	14101	17626	17626	13161	11751	11751	14101	19824	22562	19843
Romania	19157	23755	21073	14794	15860	28471	19157	4598	4109	4497
Serbia*	n/a	n/a	n/a	14981	n/a	n/a	14981	n/a	n/a	n/a
Slovakia	36179	50651	36179	30391	28944	n/a	30029	n/a	17366	20260
Slovenia	39742	48754	41032	20516	n/a	17585	35170	n/a	n/a	n/a
Spain	32503	32503	32503	27086	24377	n/a	28711	44962	54171	48754
Sweden	37906	52733	45822	34704	n/a	30723	36057	40113	45972	40564
United Kingdom	37943	48645	38916	37943	n/a	60806	38916	47185	51564	48645
2020 EUR-26	38225	50194	40131	32006	31358	38820	34584	37490	41862	38504
2018 EUR-26	34322	38960	35995	28492	21668	29674	31122	38200	37587	37773
2016 EUR-27	35679	49640	39643	29732	19822	27750	34277	34563	29732	33379
2014 EUR-26	29070	38760	31977	28571	19380	29636	29070	31159	31372	31224
2012 EUR-25	29098	39767	29098	28167	19399	29098	28487	32004	29098	30807
2010 EUR-23	30144	40000	33364	27556	25416	32517	29852	34223	27556	31957

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



* caution - small sample

Earnings data converted from local currencies to Euros exchange rate as at 01.05.20 and then adjusted for PPP

4.3 EARNINGS BY AGE

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

€	2020			2018 EUR-26 MEDIAN	2016 EUR-27 MEDIAN	2014 EUR-26 MEDIAN	2012 EUR-25 MEDIAN	2010 EUR-23 MEDIAN
	lower quartile	MEDIAN	upper quartile					
<30	18962	24341	29282	14185	16848	14241	14549	15615
30-34	21875	28777	37285	25231	22995	14763	19399	24550
35-39	24744	33094	42913	29504	26759	30189	24902	30075
40-44	27876	37233	50563	33038	29732	32704	29098	33364
45-49	27617	39261	54795	36960	36022	38611	33800	33364
50-54	31481	46143	62200	40469	40634	44025	36081	34317
55-59	29009	43014	62401	44577	42440	44824	38797	35119
60-64	29940	42879	62537	40844	42751	48264	41370	40875
65+	30734	46501	68120	32375	39374	29151	37354	36095

Earnings data converted from local currencies to Euros exchange rate as at 01.05.20 and then adjusted for PPP

Architects' average earnings rise as age increases, although there is a peak at age 50-54 and a second peak at age 65+. Although this second peak is based on a much smaller number of respondents than the first peak.

The rises by age are most steep amongst the younger age groups, for example average earnings rise by 15 per cent between ages under 30 and 30 to 34. Average earnings have increased for all but one age group compared with the 2018 survey. Architects aged under 30 have seen the largest rise while average earnings for architects aged 55 to 64 record a small decrease.

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

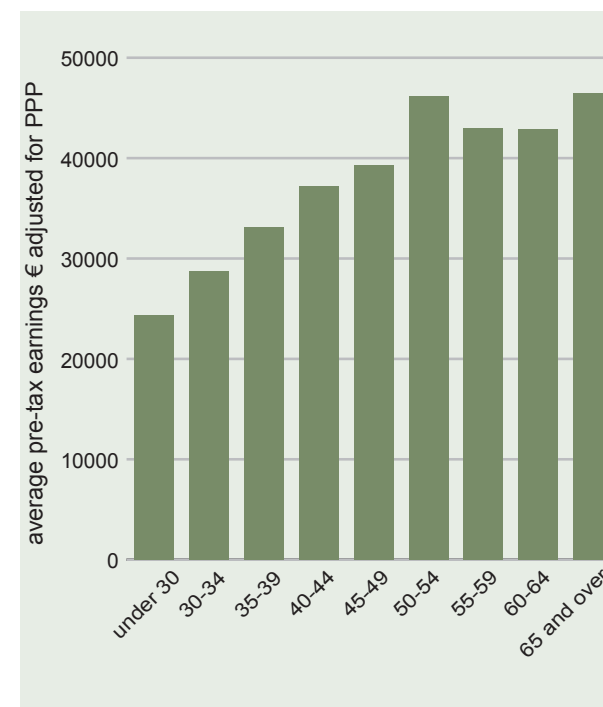
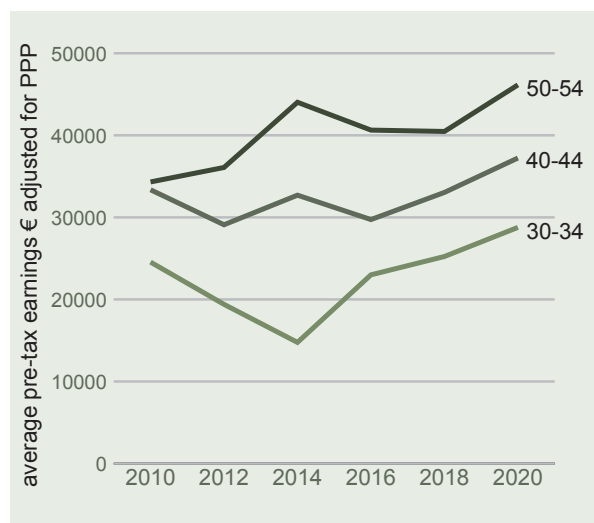


CHART 4-6
CHANGE IN ARCHITECTS' AVERAGE PRE-TAX
EARNINGS SELECTED AGES 2010-20



4.4 EARNINGS BY GENDER

Average earnings for both male and female architects have trended up over the entire survey period. Since the 2018 survey, average male architects' full-time earnings have increased by 4 per cent while the average for female architects has out-paced this rate of growth, rising by 13 per cent. Consequently, the gender pay gap has reduced from 25 per cent in 2018 to 21 per cent now. The pay gap remains, however. Only in Spain and Croatia is there parity in average earnings between the genders, although it is approaching parity in Finland, Norway, Poland, the United Kingdom and Slovakia. The pay gap is widest in Austria and the Netherlands (small sample).

The gender pay gap broadly widens with age. All age groups record higher average earnings for male architects than females which is a step backward from the 2018 survey. However, taken overall, the gender pay gap has reduced slightly in all three private practice employment fields compared with the 2018 survey. Longer term, private practice salaried shows the greatest move towards parity out of the three employment fields.

CHART 4-7
AVERAGE PRE-TAX EARNINGS OF MALE AND FEMALE ARCHITECTS WORKING FULL-TIME (ADJUSTED FOR PPP)

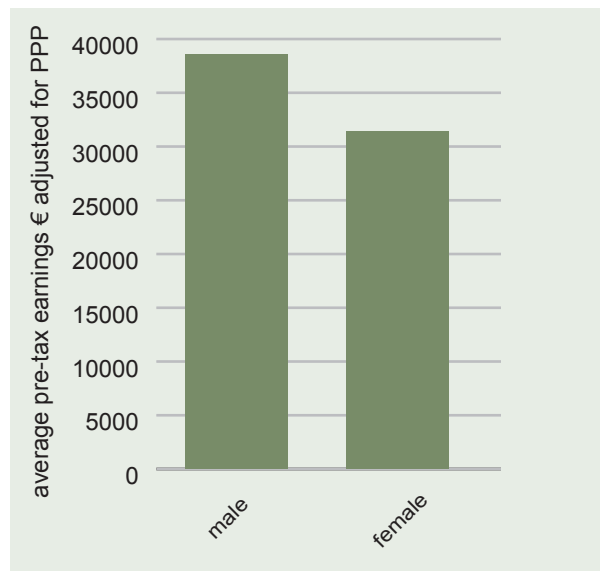


CHART 4-8
CHANGE IN MALE / FEMALE ARCHITECTS' AVERAGE PRE-TAX FULL-TIME EARNINGS 2010-20

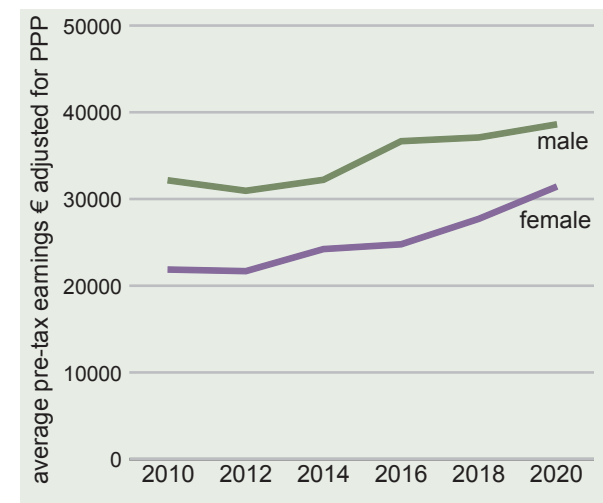


TABLE 4-4
AVERAGE PRE-TAX EARNINGS ANALYSED BY GENDER AND FULL-TIME OR PART-TIME WORKING (ADJUSTED FOR PPP AND PART-TIME EARNINGS ADJUSTED TO FULL-TIME EQUIVALENT)

€		2020			2018 EUR-27 MEDIAN	2016 EUR-27 MEDIAN	2014 EUR-26 MEDIAN	2012 EUR-26 MEDIAN	2010 EUR-23 MEDIAN
		lower quartile	MEDIAN	upper quartile					
Full time	male	26383	38601	56150	37095	36664	32213	30948	32149
	female	22606	31411	41518	27711	24777	24225	21680	21866
Part time FTE*	male	22164	33870	53793	32395	27874	30105	34099	37936
	female	20011	28484	40408	31806	24777	23750	24137	25862

Earnings data converted from local currencies to Euros exchange rate as at 01.05.20 and then adjusted for PPP

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

CHART 4-9
DIFFERENCE BETWEEN MALE AND FEMALE ARCHITECTS' AVERAGE PRE-TAX EARNINGS BY AGE

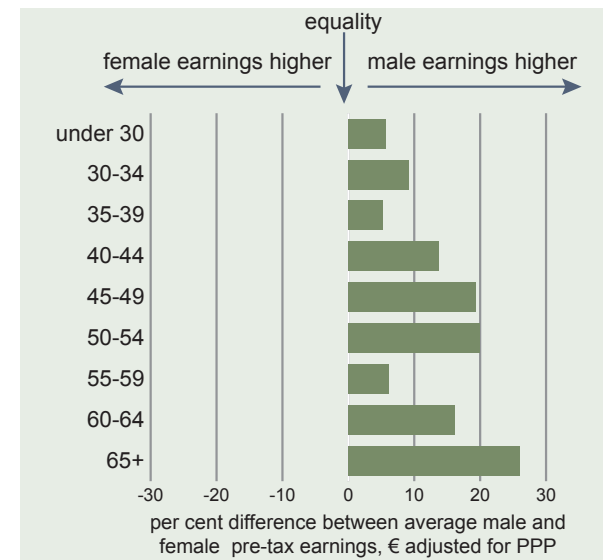


TABLE 4-5
AVERAGE PRE-TAX MALE AND FEMALE EARNINGS ANALYSED BY
COUNTRY AND SELECTED FIELD OF EMPLOYMENT (ADJUSTED FOR PPP)

per cent difference between male & female earnings	per cent difference between male & female earnings			male median pre-tax earnings €	female median pre-tax earnings €	per cent difference
	sole principal	partner/ director	private practice salaried employees			
Austria	46	17	n/a	46168	27701	40
Belgium*	21	n/a	58	41554	28907	30
Croatia	5	5	5	24173	24173	0
Czechia	20	50	21	32172	25399	21
Denmark	n/a	n/a	11	43026	38757	10
Estonia*	n/a	n/a	n/a	38217	n/a	n/a
Finland	52	33	7	47463	44517	6
France	23	52	10	36121	27574	24
Germany	34	31	16	61905	48952	21
Greece	0	n/a	7	16607	14828	11
Hungary*	n/a	n/a	n/a	28535	20643	28
Ireland	48	13	15	51834	39872	23
Italy	13	34	29	29674	23739	20
Lithuania*	n/a	n/a	n/a	45666	n/a	n/a
Luxembourg	20	n/a	n/a	55162	49251	11
Netherlands*	n/a	n/a	45	64114	28495	56
Norway	24	11	3	51083	50216	2
Poland*	94	100	41	25017	23975	4
Portugal	0	41	10	16451	13161	20
Romania	33	14	54	21015	14794	30
Serbia*	n/a	n/a	n/a	n/a	n/a	n/a
Slovakia	22	n/a	28	30897	28799	7
Slovenia	14	n/a	34	41032	30481	26
Spain	34	17	0	32503	32503	0
Sweden	16	23	7	39212	35305	10
United Kingdom	8	43	6	45376	44241	3
2020 EUROPE-26	30	37	16	50286	39565	21
2018 EUR-26	32	46	17	37095	27711	25
2016 EUR-27	36	35	31	36664	24777	32
2014 EUR-26	25	29	25	32213	24225	25
2012 EUR-25	30	58	32	30948	21680	30
2010 EUR-23	32	34	30	32149	21866	32

* caution - small sample 'Per cent difference' calculated as difference as a percentage of male earnings
Earnings data converted from local currencies to Euros exchange rate as at 01.05.20 and then adjusted for PPP

CHART 4-10
AVERAGE PRE-TAX MALE AND FEMALE EARNINGS
ALL FULL-TIME ARCHITECTS ADJUSTED FOR
PURCHASING POWER PARITY (PPP)



4.5 STUDYING & WORKING IN ANOTHER EUROPEAN COUNTRY

More than one in five architects has studied in another European country. Relatively high proportions of architects from all countries have undertaken at least some of their studies in another country.

The majority of those studying in another country took advantage of the Erasmus scheme; most of the remainder funded their time abroad themselves. Spain, Italy and the United Kingdom emerge as being the most popular destinations for study, closely followed by Germany and France.

Given such an internationally educated profession it is not surprising to find that a substantial proportion of architects have chosen to seek employment in another country. In the last 12 months, 9 per cent of architects have worked in another country. A further 29 per cent of architects have 'seriously considered' working in another country, two thirds of whom considered a European country and one third a country outside Europe. The most popular destinations in the past year have been France, Germany and Italy.

CHART 4-11
PROPORTION OF ARCHITECTS WHO HAVE STUDIED / WORKED OR SERIOUSLY CONSIDERED WORKING IN ANOTHER COUNTRY IN LAST 12 MONTHS

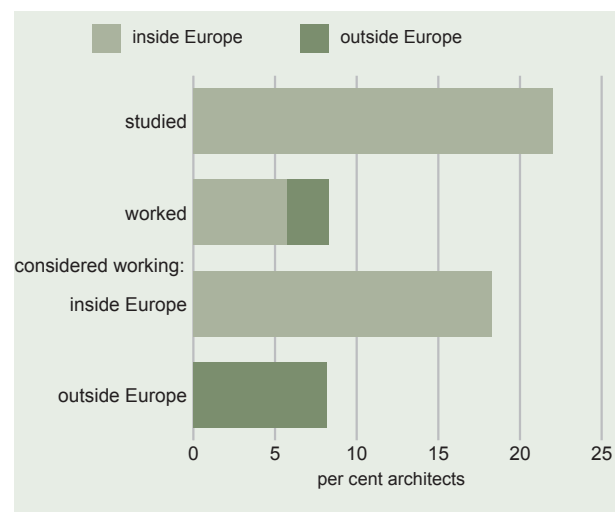


TABLE 4-6
PROPORTION OF ARCHITECTS WHO HAVE STUDIED IN ANOTHER EUROPEAN COUNTRY

per cent	educated in different country	how education was funded			
		Erasmus	ex-change	self-funded	other
Austria	25	32	7	64	14
Belgium*	24	71	16	45	10
Croatia	25	17	7	56	34
Czechia	32	62	13	24	7
Denmark	24	43	20	29	31
Estonia*	27	33	67	0	0
Finland	30	53	11	39	21
France	25	66	8	30	16
Germany	20	n/a	n/a	n/a	n/a
Greece	45	16	2	68	27
Hungary*	20	43	14	14	29
Ireland	40	17	4	64	24
Italy	14	70	4	27	15
Lithuania*	14	100	0	0	0
Luxembourg	90	3	2	80	31
Netherlands*	20	22	22	56	11
Norway	57	29	18	43	25
Poland*	29	74	0	26	13
Portugal	27	65	4	44	12
Romania	24	67	12	40	20
Serbia*	33	20	40	40	40
Slovakia	16	48	7	37	37
Slovenia	27	48	4	39	17
Spain	26	77	10	30	8
Sweden	47	44	18	29	25
United Kingdom	20	20	8	61	30
2020 EUROPE-26	22	56	8	36	17
2018 EUROPE-26	20	n/a	n/a	n/a	n/a
2016 EUROPE-27	18	n/a	n/a	n/a	n/a
2014 EUROPE-26	18	n/a	n/a	n/a	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a

* caution - small sample

CHART 4-12
ARCHITECTS WHO WERE AT LEAST PARTLY EDUCATED IN ANOTHER EUROPEAN COUNTRY

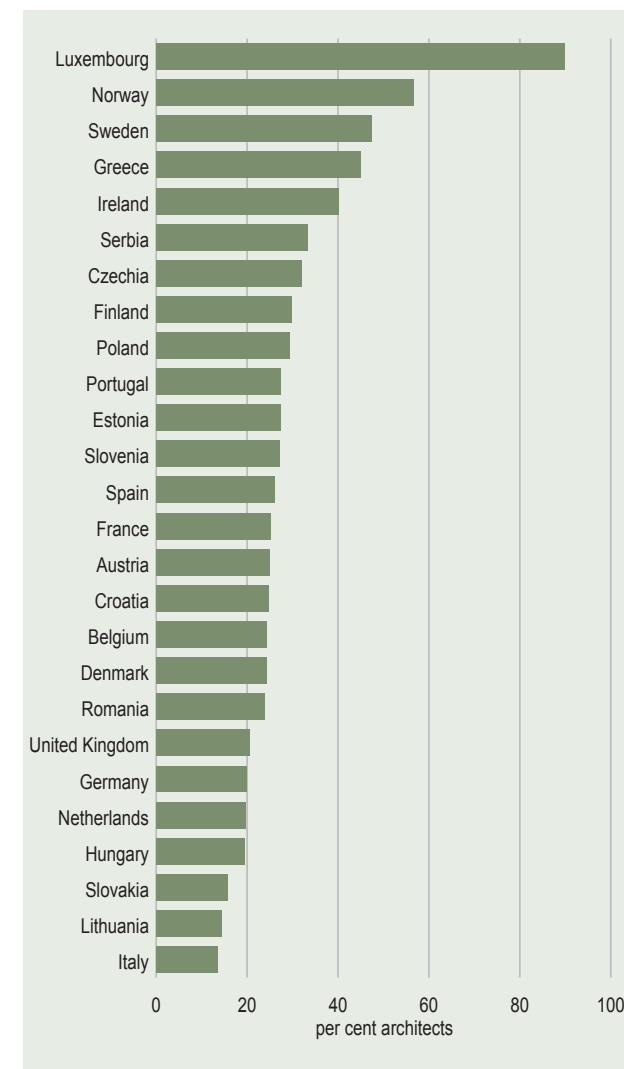


TABLE 4-7
PROPORTION OF ARCHITECTS WHO HAVE WORKED OR SERIOUSLY CONSIDERED WORKING IN ANOTHER COUNTRY IN ANOTHER COUNTRY (LAST 12 MONTHS)

per cent	worked in another country in last 12 months		All most popular destinations	why went to work in another country				have seriously considered working in another country last 12 months (%)	
	inside Europe	outside Europe		sent by practice	made positive decision	to find work	other	country inside Europe	country outside Europe
Austria	13	2	DE	38	31	15	23	12	2
Belgium*	10	4	NL	53	41	12	12	15	3
Croatia	3	3	DE	17	17	0	67	23	5
Czechia	8	1	AT	21	37	0	47	17	4
Denmark	3	2	UK NO	83	17	0	0	13	5
Estonia*	0	0		n/a	n/a	n/a	n/a	9	9
Finland	4	2	CH	18	36	18	36	8	4
France	6	5		20	40	12	40	12	9
Germany	4	2		n/a	n/a	n/a	n/a	5	3
Greece	4	2	RO BG	10	10	10	70	24	11
Hungary*	2	0		0	0	100	0	19	5
Ireland	9	4	UK	24	38	27	22	17	8
Italy	5	3	DE	15	49	23	22	23	12
Lithuania*	0	7		0	0	0	100	13	7
Luxembourg	32	2	BE FR DE	15	33	19	37	20	4
Netherlands*	27	4	BE	17	42	25	25	18	6
Norway	6	1		18	27	9	45	9	5
Poland*	5	1	CH DE DK	20	40	0	40	28	9
Portugal	6	4		7	46	43	15	27	11
Romania	6	2	UK	7	56	15	26	31	8
Serbia*	7	7		0	0	100	0	50	13
Slovakia	7	1	CZ	23	62	15	8	16	2
Slovenia	10	2	AT	22	22	33	22	22	5
Spain	5	3	IT UK FR	32	26	16	32	27	11
Sweden	3	1	UK	18	41	6	47	11	4
United Kingdom	7	3		31	28	8	38	20	11
2020 EUROPE-26	6	3		21	37	20	28	18	8
2018 EUROPE-26	6	2		n/a	n/a	n/a	n/a	19	10
2016 EUROPE-27	5	n/a		n/a	n/a	n/a	n/a	36	
2014 EUROPE-26	5	n/a		n/a	n/a	n/a	n/a	35	
2012 EUROPE-25	n/a	n/a		n/a	n/a	n/a	n/a	35	
2010 EUROPE-23	n/a	n/a		n/a	n/a	n/a	n/a	n/a	

* caution - small sample

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

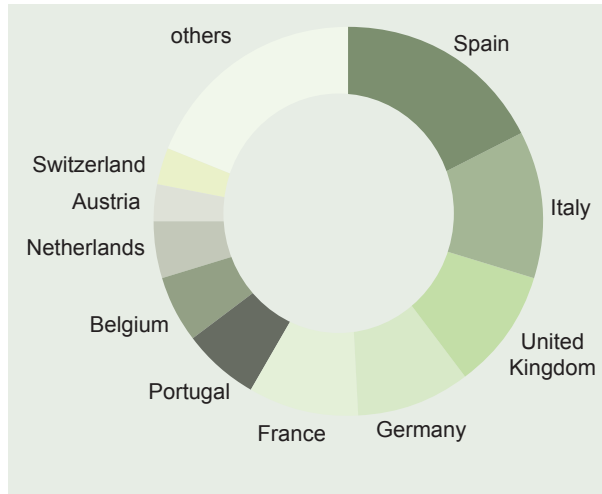


CHART 4-14
COUNTRIES OUTSIDE OWN COUNTRY IN WHICH ARCHITECTS HAVE WORKED IN LAST 12 MONTHS

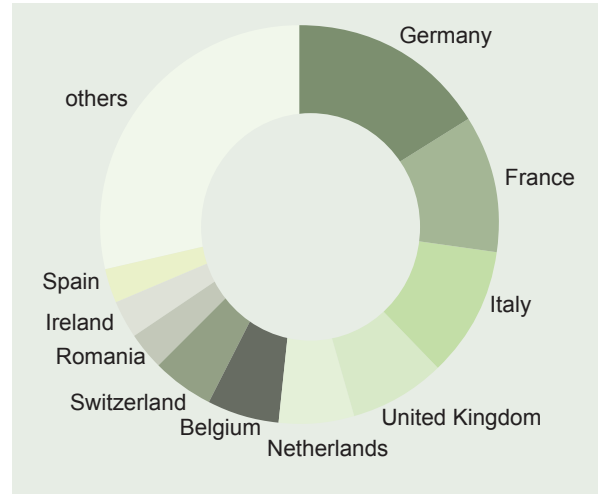


CHART 4-15
HOW ARCHITECTS WHO HAVE STUDIED IN ANOTHER COUNTRY FUNDED THEIR STUDIES

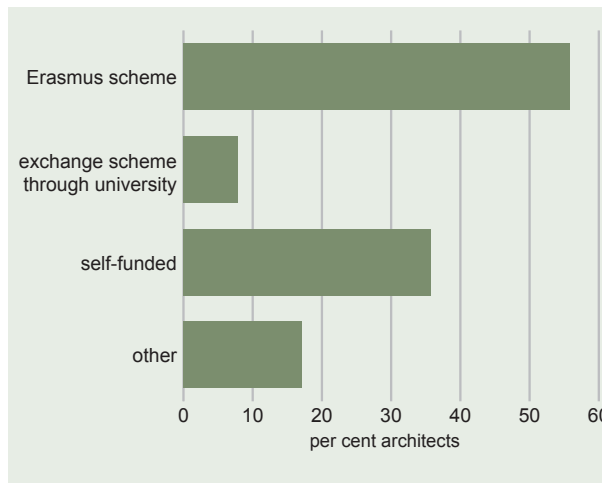


TABLE 4-8
COUNTRIES OUTSIDE OWN COUNTRY IN WHICH ARCHITECTS HAVE STUDIED OR WORKED

per cent of those who have studied or worked in another country*	studied	worked in last 12 months
Spain	17.6	2.9
Italy	12.3	10.5
United Kingdom	10.0	7.7
Germany	9.5	16.3
France	9.2	11.1
Portugal	6.2	1.4
Belgium	5.6	5.9
Netherlands	4.6	6.2
Austria	3.3	1.7
Switzerland	2.9	4.9
Poland	2.7	0.9
Denmark	2.5	2.0
Greece	2.1	2.4
Norway	1.6	2.8
Sweden	1.5	1.8
Finland	1.1	0.6
Czechia	1.0	0.6
Ireland	1.0	2.9
Slovenia	0.8	0.1
Hungary	0.6	0.9
Romania	0.6	3.0
Bulgaria	0.4	0.6
Lithuania	0.2	0.3
North Macedonia	0.2	0.2
Luxembourg	0.1	1.9
Slovakia	0.1	0.7
Bosnia	0.1	0.0
Malta	0.1	1.2
Estonia	0.1	0.1
Croatia	0.1	0.1
Serbia	0.0	0.3
Cyprus	0.0	0.8
Latvia	0.0	0.5
Others	1.7	6.7

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

The 29 per cent of architects who have 'seriously considered' working in another country were asked why they did not, ultimately, decide to work internationally. Practical, personal or relocation issues are the most common reason why architects decided not to work in another country. Out of those who had 'seriously considered' working elsewhere, 44 per cent say practical issues were the main hurdle. More than one third, 35 per cent, say that the biggest hurdle is not having enough regulatory knowledge - planning or building regulations. Nearly as many cite insufficient language skills as being a major concern. About one quarter feel they did not have enough knowledge of the local market.

CHART 4-16
MAIN CONCERNS - WORKING IN ANOTHER COUNTRY

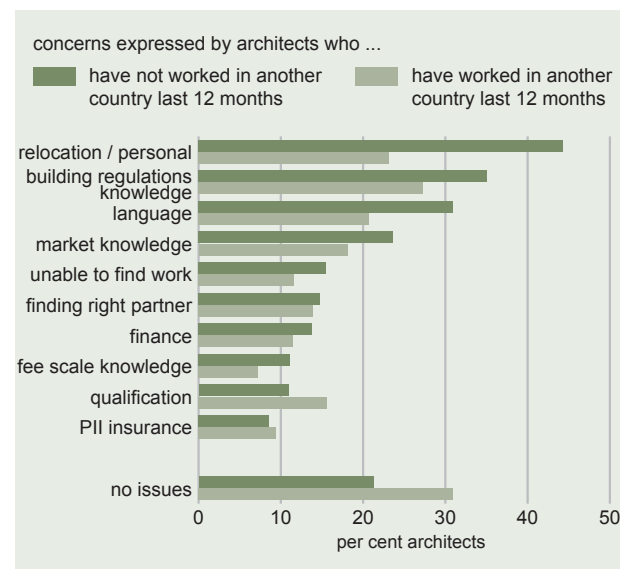


TABLE 4-9
MAIN CONCERNS ABOUT WORKING IN ANOTHER COUNTRY CITED BY ARCHITECTS WHO HAVE NOT WORKED IN ANOTHER COUNTRY

per cent	unable to find work	insufficient language skills	insufficient knowledge of planning / building regulations	architectural qualification issues	finding right architectural partner	finance	practical relocation or personal issues	knowledge of local market	knowledge of local fee scales / tariffs	PII cover for work in other European countries
Austria	8	14	42	6	18	8	35	40	16	9
Belgium*	8	23	58	11	19	19	35	44	29	14
Croatia	8	29	44	16	15	17	40	29	10	4
Czechia	13	43	55	16	14	11	40	34	14	14
Denmark	11	12	27	6	2	8	44	12	5	1
Estonia*	18	18	36	0	27	18	45	36	18	9
Finland	11	21	32	9	12	8	44	25	10	7
France	11	36	44	9	21	14	37	40	18	11
Germany	20	27	34	20	11	9	43	21	12	13
Greece	20	22	36	11	17	18	57	20	8	8
Hungary*	15	31	46	5	28	15	23	33	26	18
Ireland	18	32	33	9	9	12	49	27	13	13
Italy	6	34	25	5	18	17	58	17	6	4
Lithuania*	8	38	62	0	46	15	38	38	8	8
Luxembourg	13	2	15	6	11	15	28	28	11	21
Netherlands*	9	18	44	15	18	12	47	41	12	6
Norway	15	13	31	5	7	16	48	15	7	3
Poland*	11	38	53	14	9	9	24	30	8	5
Portugal	18	21	29	6	11	17	46	22	10	6
Romania	17	18	43	19	17	16	48	31	16	10
Serbia*	23	23	46	23	38	15	46	15	15	0
Slovakia	14	45	39	10	15	10	36	29	11	7
Slovenia	30	36	51	12	7	11	55	27	9	16
Spain	32	45	45	9	13	15	21	22	9	9
Sweden	8	10	16	6	2	3	38	15	3	3
United Kingdom	26	43	39	10	10	13	40	30	16	15
2020 EUROPE-26	15	31	35	11	15	14	44	24	11	9
2018 EUROPE-26	15	32	32	11	13	14	46	23	10	9
2016 EUROPE-27	25	36	38	16	n/a	n/a	46	29	12	11
2014 EUROPE-26	18	38	37	11	n/a	n/a	47	26	11	10
2012 EUROPE-25	19	39	35	11	n/a	n/a	66	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

* caution - small sample

4.6 RETIREMENT

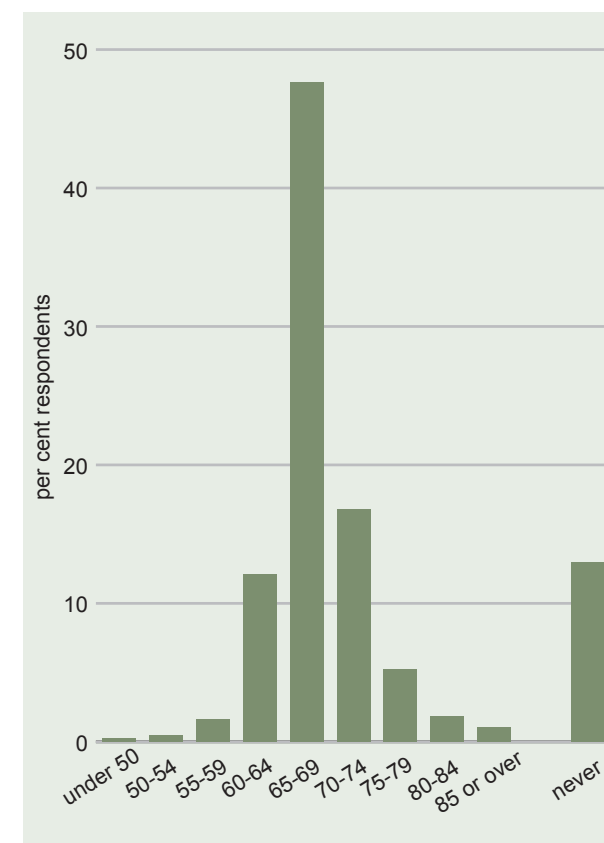
TABLE 4-10
AGE AT WHICH ARCHITECTS EXPECT TO RETIRE ANALYSED BY COUNTRY

per cent	under 50	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85 or over	never
Austria	0	0	0	9	43	27	7	3	0	11
Belgium*	0	0	2	9	53	20	9	1	0	7
Croatia	2	1	4	21	32	13	4	1	0	22
Czechia	0	0	0	11	27	19	8	3	1	29
Denmark	0	0	1	10	44	33	10	0	0	3
Estonia*	0	0	0	20	30	0	20	0	10	20
Finland	0	1	1	18	56	9	6	3	1	5
France	1	1	3	22	41	15	4	2	1	10
Germany	0	0	0	7	78	9	2	1	1	1
Greece	1	0	1	13	46	16	5	2	1	17
Hungary*	0	0	3	15	31	13	3	10	5	21
Ireland	0	0	1	12	46	20	7	1	1	11
Italy	0	0	1	13	34	22	7	2	1	20
Lithuania*	0	0	0	7	50	14	7	7	7	7
Luxembourg	1	1	3	27	49	3	5	0	0	10
Netherlands*	0	2	0	6	50	25	2	2	0	13
Norway	0	0	1	4	49	31	4	2	1	8
Poland*	2	2	1	17	26	10	5	1	1	35
Portugal	1	1	4	14	40	11	3	2	2	21
Romania	1	1	5	19	23	13	5	3	3	25
Serbia*	0	0	13	13	53	13	0	0	0	7
Slovakia	1	1	1	18	30	19	5	3	2	19
Slovenia	0	1	2	13	35	19	8	1	1	19
Spain	0	1	2	10	52	16	5	2	1	13
Sweden	0	0	1	14	61	14	3	2	1	3
United Kingdom	0	0	3	16	33	21	8	2	1	15
2020 EUR-26	0	0	2	12	48	17	5	2	1	13
2018 EUR-26	0	1	2	13	38	20	6	2	1	17
2016 EUR-27	1	2	3	14	35	18	6	2	1	18
2014 EUR-26	1	1	2	15	38	15	6	2	1	19
2012 EUR-25	1	1	2	14	34	16	6	2	2	23
2010 EUR-23	2	3	5	20	37	13	4	1	1	14

* caution - small sample

Almost half of architects expect to retire at age 65 to 69. A substantial minority, 13 per cent, say they will 'never' retire. Fourteen per cent expect to retire before they are 65 years old. Countries where more than a quarter of architects expect to retire before the age of 65 include Luxembourg, Croatia, France and Romania. More than 40 per cent of architects in several countries including Norway, Denmark, Italy and the United Kingdom do not expect to retire before they are at least 70 years old.

CHART 4-17
AGE AT WHICH ARCHITECTS EXPECT TO RETIRE



Three quarters of the profession say they will 'definitely' or 'probably' continue to practice architecture until they retire. Most of the remainder are 'not sure'. Just 5 per cent say they will 'probably' not continue to practice as an architect, 2 per cent say 'definitely' not. Each proportion is similar to figures recorded in previous surveys.

CHART 4-18
LIKELIHOOD OF CONTINUING TO WORK AS AN ARCHITECT UNTIL RETIREMENT

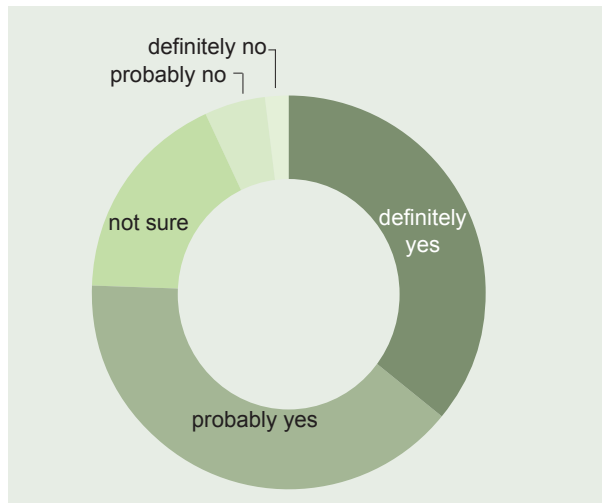


TABLE 4-11
WHETHER ARCHITECTS WILL CONTINUE TO PRACTICE THEIR PROFESSION UNTIL THEY RETIRE

per cent	definitely yes	probably yes	not sure	probably no	definitely no
Austria	53	41	5	1	1
Belgium*	16	42	30	5	8
Croatia	38	43	13	5	1
Czechia	41	40	15	1	2
Denmark	39	46	13	2	1
Estonia*	40	60	0	0	0
Finland	42	49	6	3	0
France	32	41	20	6	1
Germany	39	47	11	2	1
Greece	44	35	16	4	1
Hungary*	68	23	5	5	0
Ireland	42	44	10	4	0
Italy	31	36	22	7	3
Lithuania*	36	29	29	7	0
Luxembourg	44	41	11	4	0
Netherlands*	30	45	17	9	0
Norway	45	42	8	4	0
Poland*	27	52	15	4	1
Portugal	33	36	22	7	2
Romania	41	37	17	3	3
Serbia*	29	43	29	0	0
Slovakia	43	44	12	1	0
Slovenia	54	28	16	2	0
Spain	42	26	21	8	3
Sweden	37	44	13	4	2
United Kingdom	38	45	13	5	0
2020 EUROPE-26	36	40	17	5	2
2018 EUROPE-26	35	38	19	6	2
2016 EUROPE-27	36	37	19	6	2
2014 EUROPE-26	36	38	18	6	2
2012 EUROPE-25	35	39	18	6	2
2010 EUROPE-23	41	43	12	3	1

* caution - small sample

4.7 HOURS WORKED

Most architects work more than 40 hours per week. Sole Principals have the longest working week reporting 48 hours per week. Partners & Directors report that they work almost as many hours per week. An average 42 hours per week is reported by private practice salaried architects slightly more than architects who are freelance or working in other private settings. Architects working in the public sector report the shortest working week averaging about 39 hours per week.

It is noticeable that salaried employees whether in private practice or the public sector are working fewer hours in this year's survey than in 2018 almost certainly a direct effect of the Covid-19 pandemic.

TABLE 4-12
 AVERAGE (MEAN) NUMBER OF HOURS WORKED PER WEEK
 ANALYSED BY COUNTRY AND FIELD OF EMPLOYMENT

hours / week	sole principal	partner/ director	private practice salaried employees	freelance	other private	local / central government	other public
Austria	49.1	48.3	n/a	43.3	n/a	n/a	47.5
Belgium*	48.1	47.1	46.9	42.4	43.1	n/a	38.8
Croatia	48.2	43.5	44.4	41.1	46.0	43.1	40.0
Czechia	47.6	45.3	45.4	45.0	42.6	41.6	43.4
Denmark	41.3	40.7	37.0	38.1	38.8	38.0	37.6
Estonia*	40.0	40.0	n/a	42.5	n/a	45.0	n/a
Finland	42.0	41.0	40.0	38.9	39.2	37.7	39.1
France	44.9	41.1	40.6	37.4	41.9	38.7	40.6
Germany	50.1	49.4	39.8	39.9	40.4	39.2	39.3
Greece	48.7	43.8	48.5	44.2	48.5	39.3	45.5
Hungary*	45.1	43.3	n/a	42.5	41.0	45.0	48.8
Ireland	42.1	45.6	43.4	40.6	42.5	38.5	40.5
Italy	43.6	44.5	41.9	41.0	41.4	36.4	37.1
Lithuania*	40.0	39.3	n/a	41.7	60.0	n/a	n/a
Luxembourg	44.4	44.3	42.8	n/a	43.3	n/a	n/a
Netherlands*	43.3	46.9	46.7	39.4	n/a	n/a	50.0
Norway	39.8	41.5	38.7	39.0	39.0	37.8	39.3
Poland*	51.1	53.3	40.0	42.0	41.5	n/a	44.0
Portugal	44.4	42.7	40.8	40.2	41.1	35.7	38.6
Romania	44.1	42.6	45.1	40.7	42.9	39.2	42.5
Serbia*	50.0	42.0	n/a	40.0	n/a	n/a	40.0
Slovakia	46.0	45.0	49.6	49.4	47.3	38.8	42.8
Slovenia	46.0	49.0	38.8	41.2	42.9	42.0	40.0
Spain	46.2	44.7	41.4	41.3	44.2	39.9	42.0
Sweden	42.7	43.6	40.7	40.0	42.5	39.2	39.6
United Kingdom	43.2	42.6	40.0	39.6	43.0	38.6	41.4
2020 EUROPE-26	48.0	47.4	42.2	40.0	40.9	38.6	39.1
2018 EUROPE-26	48.2	47.7	43.6	44.8	44.8	41.2	41.9
2016 EUROPE-27	47.2	48.8	43.1	44.5	44.0	40.0	40.0
2014 EUROPE-26	44.5	45.3	43.9	42.9	44.0	40.3	41.0
2012 EUROPE-25	45.3	46.1	43.2	40.2	43.1	38.1	38.9
2010 EUROPE-23	46.2	45.8	41.2	43.9	44.8	38.3	38.4

* caution - small sample

4.8 CONTINUING PROFESSIONAL DEVELOPMENT (CPD)

Architects are spending an average of 20 hours per year undertaking CPD. This is exactly the same amount of time as in 2018. Sole Principals, Partners & Directors and public sector architects spend rather more hours per year undertaking CPD than private practice salaried architects, those working freelance or architects in other private positions.

There is, however, a wide variation between countries in the amount of time architects spend fulfilling their CPD requirements. The number of hours of CPD per year are greatest in Spain, Ireland and the United Kingdom. Architects in Czechia, Croatia, Estonia and Luxembourg spend the fewest hours per year undertaking CPD.

TABLE 4-13
CPD HOURS ANALYSED BY COUNTRY

	average (median) number hours CPD per year
Austria	25
Belgium*	20
Croatia	5
Czechia	0
Denmark	20
Estonia*	8
Finland	10
France	12
Germany	20
Greece	10
Hungary*	20
Ireland	40
Italy	30
Lithuania*	12
Luxembourg	8
Netherlands*	28
Norway	10
Poland*	30
Portugal	10
Romania	10
Serbia*	15
Slovakia	10
Slovenia	20
Spain	50
Sweden	16
United Kingdom	36
2020 EUROPE-26	20
2018 EUROPE-26	20
2016 EUROPE-27	24
2014 EUROPE-26	20
2012 EUROPE-25	38
2010 EUROPE-23	n/a

* caution small sample

TABLE 4-14
CPD HOURS AND SPEND ANALYSED BY FIELD OF
EMPLOYMENT

	average (median) number hours CPD per year
sole principal	25
partner/director	25
private practice salaried employees	20
freelance	20
other private	20
local / central government	24
other public	25
2020 EUROPE-26	20
2018 EUROPE-26	20
2016 EUROPE-27	24
2014 EUROPE-26	20
2012 EUROPE-25	38
2010 EUROPE-23	n/a

4.9 MITIGATING CLIMATE CHANGE

TABLE 4-15
PROPORTION OF ARCHITECTS USING SUSTAINABLE CONCEPTS FREQUENTLY ANALYSED BY COUNTRY

per cent respondents	proportion of architects using the concept frequently			
	Low Energy Buildings	Nearly Zero Energy Buildings (nZEB)	Plus Energy buildings	Circular Design
Austria	76	18	10	20
Belgium*	61	34	11	30
Croatia	84	46	15	12
Czechia	72	33	10	10
Denmark	66	6	15	35
Estonia*	89	50	38	14
Finland	58	13	7	29
France	63	11	20	18
Germany	51	7	5	8
Greece	66	20	15	13
Hungary*	62	39	11	16
Ireland	77	65	8	10
Italy	57	14	7	11
Lithuania*	77	20	42	9
Luxembourg	90	35	22	24
Netherlands*	56	39	29	55
Norway	65	22	27	30
Poland*	68	11	6	16
Portugal	54	8	16	16
Romania	63	15	11	9
Serbia*	57	13	20	20
Slovakia	78	20	9	11
Slovenia	55	21	5	11
Spain	51	25	20	14
Sweden	52	5	8	28
United Kingdom	53	14	6	19
2020 EUROPE-26	57	15	10	15
2018 EUROPE-26	n/a	n/a	n/a	n/a
2016 EUROPE-27	n/a	n/a	n/a	n/a
2014 EUROPE-26	n/a	n/a	n/a	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a

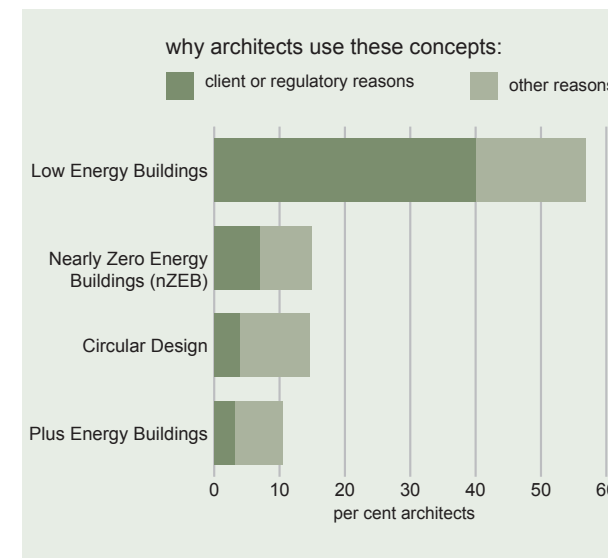
* caution - small sample

A new set of questions for this year's survey reveals how architects are using sustainable concepts to help mitigate the effects of climate change. Well over half of the profession 'frequently' use sustainable concepts in their day to day work.

Fifty seven per cent of architects 'frequently' apply the concept of Low Energy building to their work. The proportion is highest among architects in Luxembourg, Croatia and Estonia (small sample).

Smaller proportion of the profession regularly apply the other sustainable development concepts. Fifteen per cent use Circular Design and nZEB frequently, while 10 per cent design Plus Energy buildings frequently.

CHART 4-19
SUSTAINABLE CONCEPTS USED FREQUENTLY BY ARCHITECTS



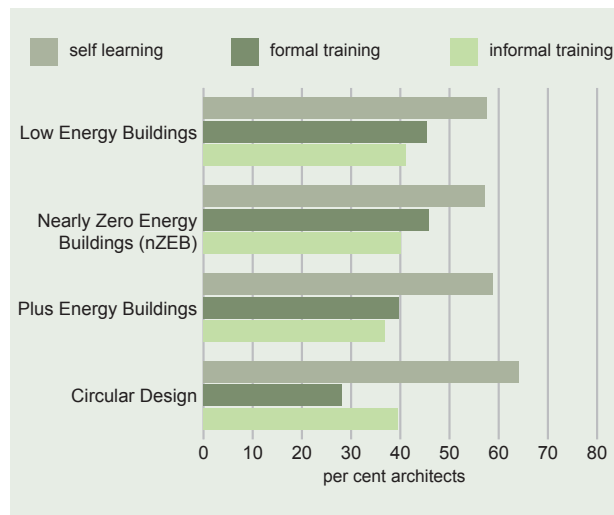
One of the reasons why architects use sustainable concepts is because they are demanded by the client or because it is a regulatory requirement. This may be the main driver behind the widespread adoption of low energy building design; 70 per cent of respondents say that they use this concept because it is demanded by the client or regulations. But client or regulatory demands are behind fewer than half of architects' decisions to use nZEB and less than 30 per cent of reasons to use Circular Design or Plus Energy.

Architects have used a mix of methods to learn how to deliver these sustainable concepts. In all cases, more than half of architects learned the methods themselves. Fewer received formal or informal training.

TABLE 4-16
WHY ARCHITECTS USE THE SUSTAINABLE CONCEPTS AND HOW THEY LEARNED THE CONCEPTS

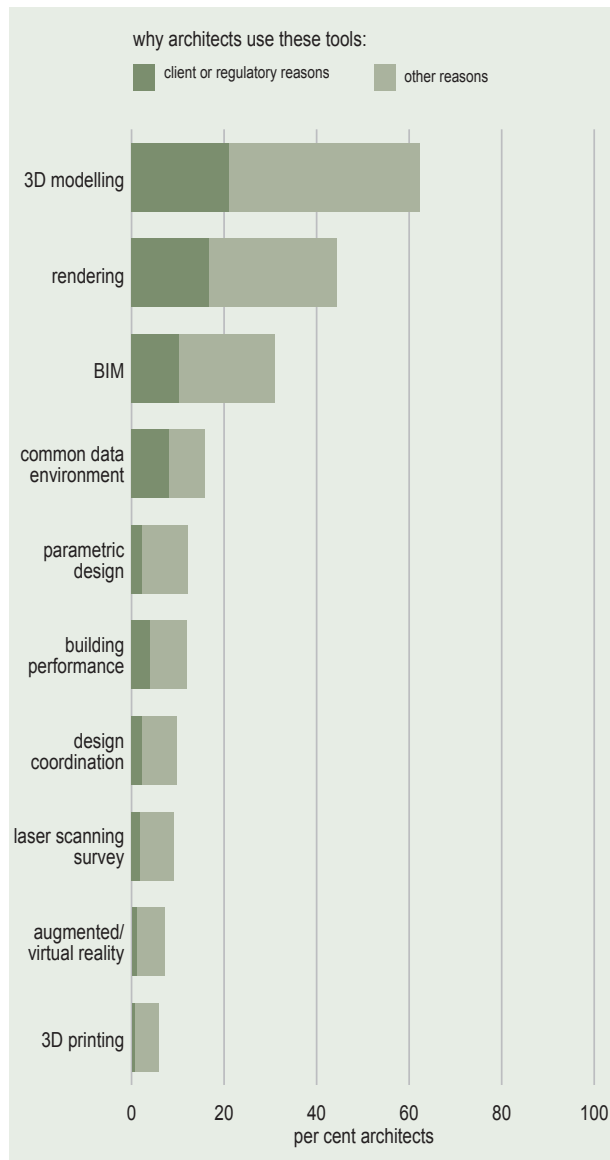
per cent respondents	for those architects using the concept frequently			
	use concept because of client or regulatory requirement	self learning	formal training	informal training
Low Energy Buildings	64	58	45	41
Nearly Zero Energy Buildings (nZEB)	43	57	46	40
Plus Energy Buildings	29	59	40	37
Circular Design	24	64	28	40
2018 EUROPE-26	n/a	n/a	n/a	n/a
2016 EUROPE-27	n/a	n/a	n/a	n/a
2014 EUROPE-26	n/a	n/a	n/a	n/a
2012 EUROPE-25	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a

CHART 4-20
HOW ARCHITECTS LEARNED TO DELIVER SUSTAINABLE CONCEPTS



4.10 DIGITALISATION IN ARCHITECTURE

CHART 4-21
ARCHITECTS' USE OF TOOLS



There has been a proliferation of new digital tools which the architectural profession is adopting. A majority of architects use 3D modelling tools 'frequently', and nearly half use rendering tools frequently. About one in three architects frequently use BIM on their projects. Other digital tools are used by a minority of architects.

It is notable that the minority of architects are using these tools because they are a client or regulatory requirement; most architects use the tools out of their own choice.

The vast majority of architects taught themselves how to use these digital tools. No more than 35 per cent received formal training for any of the tools, although more received informal training.

TABLE 4-17
HOW ARCHITECTS LEARNED TO USE TOOLS

per cent respondents	how architects learned to use these tools		
	self learning	formal training	informal training
3D modelling tools	71	32	38
Rendering tools	75	25	32
BIM (3D modelling + information inside the model)	59	34	48
Common data environment	63	11	50
Parametric design tool	71	30	31
Building performance simulation and analysis tool	63	35	30
Design coordination tools (eg clash detection)	58	22	48
Laser scanning survey tool	62	21	34
Augmented/virtual reality tool	70	14	34
3D printing tool	66	17	31

TABLE 4-18
 PROPORTION OF ARCHITECTS USING DIGITALISATION TOOLS FREQUENTLY ANALYSED BY COUNTRY

per cent respondents	proportion of architects using the tool frequently									
	3D modelling tools	BIM (3D modelling + information inside the model)	Rendering tools	Design coordination tools (eg clash detection)	Building performance simulation and analysis tool	Parametric design tool	Laser scanning survey tool	3D printing tool	Augmented/virtual reality tool	Common data environment
Austria	76	35	65	9	6	8	3	18	11	32
Belgium*	85	38	50	10	12	8	4	3	3	17
Croatia	50	30	87	4	5	8	6	4	7	18
Czechia	64	27	60	6	2	5	2	11	6	61
Denmark	59	41	31	15	8	13	7	8	6	34
Estonia*	100	60	70	60	0	40	10	0	10	40
Finland	64	48	40	26	4	16	10	5	5	46
France	81	26	63	7	10	7	2	7	7	7
Germany	39	19	23	4	3	2	2	3	4	21
Greece	58	25	23	22	7	19	33	11	11	26
Hungary*	62	29	46	8	3	9	11	6	0	21
Ireland	74	46	45	19	13	9	9	6	9	27
Italy	62	25	50	7	19	19	15	6	7	9
Lithuania*	75	25	25	8	25	8	17	8	17	11
Luxembourg	89	45	71	4	21	3	3	9	10	14
Netherlands*	84	53	52	19	10	12	14	14	12	35
Norway	76	66	49	30	13	9	6	11	14	23
Poland*	75	49	56	11	4	11	5	5	11	13
Portugal	69	36	50	15	7	19	16	8	8	8
Romania	80	48	58	16	14	11	8	8	12	16
Serbia*	53	7	80	7	0	29	0	0	7	29
Slovakia	80	27	57	6	3	13	6	5	4	17
Slovenia	77	42	56	15	2	11	2	6	9	6
Spain	72	41	53	8	27	15	3	5	8	11
Sweden	80	64	38	34	9	11	5	10	8	2
United Kingdom	74	50	43	18	11	9	11	5	12	18
2020 EUROPE-26	62	31	44	10	12	12	9	6	7	16
2018 EUROPE-26	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>
2016 EUROPE-27	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>
2014 EUROPE-26	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>
2012 EUROPE-25	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>
2010 EUROPE-23	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>

* caution small sample

SECTION 2: COUNTRY PROFILES



Library Dornbirn, Austria
Architect: Dietrich Untertrifaller,
Christian Schmoelz Architects
Photograph: Maurizio Tami

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Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	8 375 290	8 443 018	8 507 786	8 700 471	8 822 267	8 901 064
GDP PIB € m	279 607	300 712	313 067	339 896	369 899	397 575
GDP/PIB head/habitant €	33 385	35 617	36 798	39 066	41 928	44 666
Construction € m	35 830	39 574	47 832	46 745	58 318	61 021

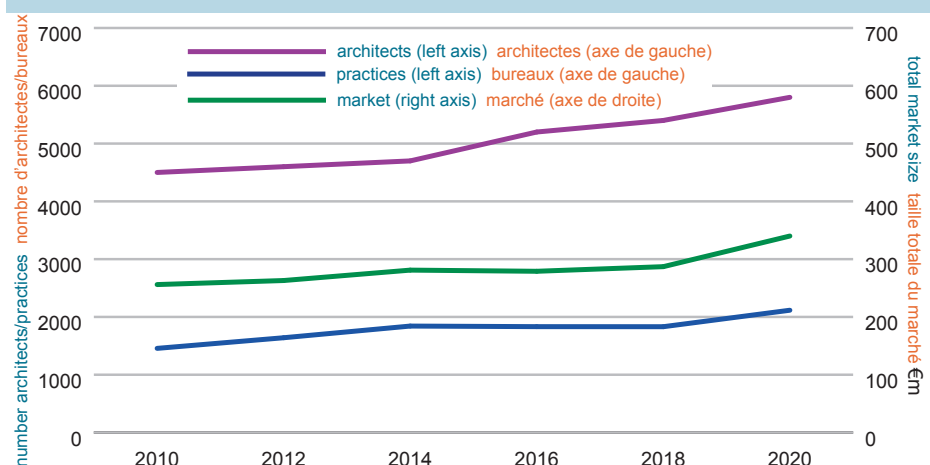
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	4 500	4 600	4 600	5 200	5 400	5 800
% Male Homme	84	82	82	80	78	81
% Female Femme	16	18	18	20	22	19
% <40 years <40 ans	17	18	20	14	12	8
Practices Bureaux	1 476	1 640	1 842	1 832	1 831	2 116

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	256	263	281	279	287	340
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	148 967	107 774	140 842	122 690	132 203	114 795
6 - 10 persons personnes	614 141	643 469	625 091	696 923	519 913	712 736

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	65	64	72	68	65	73
Partners & Directors Associé dirigeant	22	25	24	23	32	23
Private practice Salaried Salarié – Secteur privé	5	5	2	5	2	3
Private in-house L'industrie / commerce	1	0	0	0	0	0
Freelance Indépendant	2	2	2	1	1	1
Other Private Autres – Secteur privé	2	2	0	0	0	0
Local / central government Collectivité locale / gouvernement	1	1	0	0	0	0
Other Public Autre – secteur public	2	0	0	2	0	1

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	40 000	43 000	45 000	50 000	50 000	40 000
Partners & Directors Associé dirigeant	42 000	46 300	52 200	59 000	52 750	53 900
Private practice Salaried Salarié – Secteur privé	40 000	39 000	43 900	37 650	n/a	60 000
Private in-house L'industrie / commerce	40 000	42 000	n/a	n/a	n/a	n/a
Freelance Indépendant	52 500	65 000	31 500	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	105 000	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	45 000	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	42 000	45 000	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	672	583	250	392	380	198
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-4	+/-4	+/- 6	+/- 4.8	4.8	6.8

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	10 827 000	11 041 266	11 203 992	11 289 853	11 413 058	11 549 888
GDP PIB € m	349 122	369 836	382 692	409 407	439 052	473 085
GDP/PIB head/habitant €	32 246	33 496	34 157	36 263	38 469	40 960
Construction € m	53 699	56 135	66 969	75 711	69 845	77 279

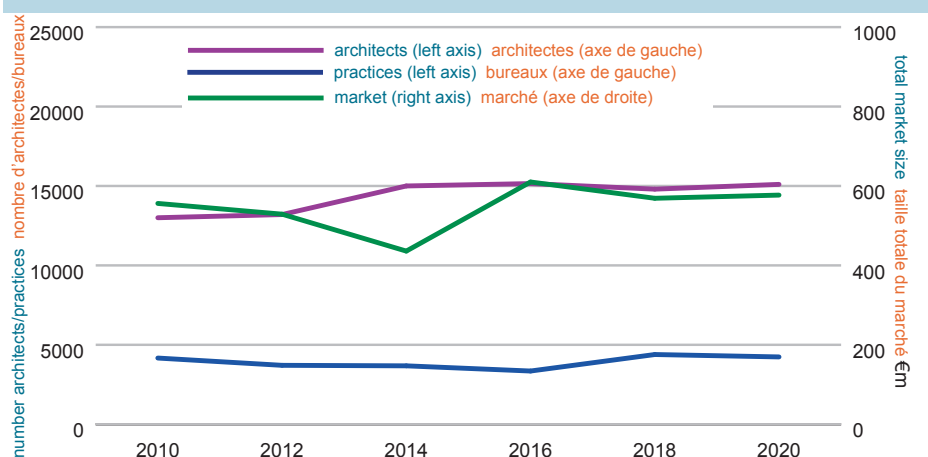
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	13 000	13 200	15 000	15 100	14 800	15 100
% Male Homme	76	72	73	72	68	55
% Female Femme	24	28	27	28	32	45
% <40 years <40 ans	45	54	45	36	47	50
Practices Bureaux	4 167	3 709	3 677	3 350	4 389	4 238

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	556	529	436	610	569	577
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	116 434	78 786	114 414	365 053	119 917	110 702
6 - 10 persons personnes	613 153	439 862	575 696	675 677	n/a	800 000

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	21	15	26	25	35	43
Partners & Directors Associé dirigeant	11	8	11	9	10	10
Private practice Salaried Salarié – Secteur privé	7	7	11	6	10	18
Private in-house L'industrie / commerce	0	0	0	0	1	0
Freelance Indépendant	25	30	22	20	37	18
Other Private Autres – Secteur privé	29	33	24	33	3	6
Local / central government Collectivité locale / gouvernement	2	3	2	4	1	2
Other Public Autre – secteur public	4	4	3	1	2	2

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	30 000	45 000	35 000	40 000	40 000	34 000
Partners & Directors Associé dirigeant	45 000	45 000	45 000	47 400	40 000	35 000
Private practice Salaried Salarié – Secteur privé	40 000	47 500	36 000	50 000	38 000	43 328
Private in-house L'industrie / commerce	30 000	29 850	n/a	n/a	n/a	n/a
Freelance Indépendant	30 000	30 000	28 000	32 330	34 000	34 850
Other Private Autres – Secteur privé	41 891	41 250	30 000	35 000	n/a	27 500
Local / central government Collectivité locale / gouvernement	45 000	35 000	32 000	41 000	n/a	n/a
Other Public Autre – secteur public	32 330	31 700	40 900	40 852	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	756	446	815	496	176	129
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-3	+/-4.6	+/- 3.3	+/- 4.3	7.3	8.6

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	7 563 710	7 327 224	7 245 677	7 153 784	7 050 034	6 951 482
GDP PIB € m	35 558	38 483	39 940	45 287	51 663	60 675
GDP/PIB head/habitant €	4 701	5 252	5 512	6 330	7 328	8 728
Construction € m	3 258	4 859	6 608	7 067	6 775	9 343

Architectural Profession Profession d'architecte

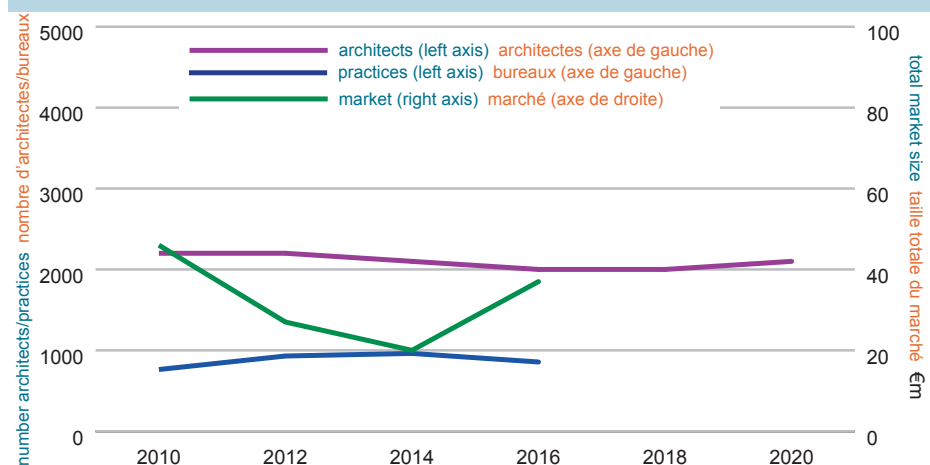
	2010	2012	2014	2016	2018	2020
Architects Architectes	2 200*	2 200*	2 100*	2 000	2 000	2 100
% Male Homme	50	45	47	46	n/a	n/a
% Female Femme	50	55	53	54	n/a	n/a
% <40 years <40 ans	45	41	46	45	n/a	n/a
Practices Bureaux	763	930	962	856	n/a	n/a

* revised * révisé

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	46	27	20	37	n/a	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	52 452	17 783	30 893	39 276	n/a	n/a
6 - 10 persons personnes	92 183	76 255	38 343	n/a	n/a	n/a

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	33	36	24	36	n/a	n/a
Partners & Directors Associé dirigeant	9	10	12	7	n/a	n/a
Private practice Salaried Salarié – Secteur privé	37	36	43	29	n/a	n/a
Private in-house L'industrie / commerce	0	1	0	0	n/a	n/a
Freelance Indépendant	15	8	6	16	n/a	n/a
Other Private Autres – Secteur privé	3	1	4	3	n/a	n/a
Local / central government Collectivité locale / gouvernement	1	5	12	5	n/a	n/a
Other Public Autre – secteur public	1	5	0	4	n/a	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en €*					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	7 671	12 271	10 225	5 427	n/a	n/a
Partners & Directors Associé dirigeant	20 455	14 000	3 476	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	6 204	4 908	3 460	1 942	n/a	n/a
Private in-house L'industrie / commerce	5 881	6 135	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	4 602	7 669	6 130	n/a	n/a
Other Private Autres – Secteur privé	n/a	2 045	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	2 211	5 317	4 291	n/a	n/a
Other Public Autre – secteur public	7 671	6 135	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	141	283	83	147	n/a	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-8	+/-5.5	+/- 10.6	+/- 7.9	n/a	n/a

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	4 425 747	4 398 150	4 246 700	4 190 669	4 105 493	4 058 165
GDP PIB € m	45 779	44 892	43 128	43 847	48 990	53 937
GDP/PIB head/habitant €	10 344	10 207	10 156	10 463	11 933	13 291
Construction € m	n/a	n/a	n/a	6 207	6 046	5 931

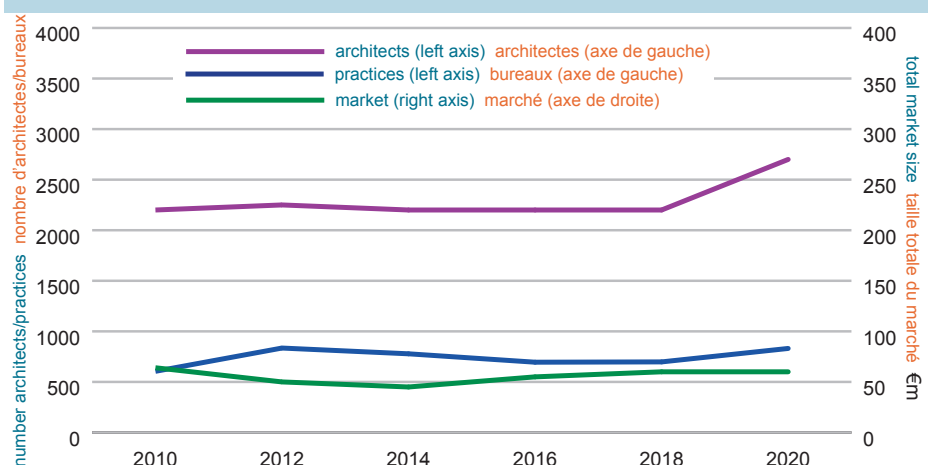
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	2 200	2 250	2 200	2 200	2 200	2 700
% Male Homme	44	45	47	41	46	38
% Female Femme	56	55	53	59	54	62
% <40 years <40 ans	31	31	44	40	33	41
Practices Bureaux	605	835	778	695	698	831

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	64	50	45	55	60	60
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	66 379	74 660	51 000	110 403	56 610	34 416
6 - 10 persons personnes	218 190	160 050	157 775	141 135	523 748	307 049

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	24	25	25	15	15	22
Partners & Directors Associé dirigeant	19	21	21	21	32	24
Private practice Salaried Salarié – Secteur privé	39	36	42	39	38	44
Private in-house L'industrie / commerce	2	0	0	2	1	0
Freelance Indépendant	5	3	1	4	3	3
Other Private Autres – Secteur privé	2	2	2	3	1	3
Local / central government Collectivité locale / gouvernement	4	4	5	7	3	3
Other Public Autre – secteur public	4	8	4	9	7	1

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	13 746	12 087	15 777	10 392	9 718	18 895
Partners & Directors Associé dirigeant	14 090	11 594	12 293	9 985	13 227	19 233
Private practice Salaried Salarié – Secteur privé	16 152	14 675	11 044	12 498	11 337	13 497
Private in-house L'industrie / commerce	15 464	10 940	n/a	19 304	n/a	n/a
Freelance Indépendant	15 121	16 010	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	15 945	14 142	n/a	15 044	n/a	n/a
Local / central government Collectivité locale / gouvernement	15 670	19 212	14 507	13 047	20 245	10 419
Other Public Autre – secteur public	14 433	13 341	n/a	17 680	6 748	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	404	423	93	318	305	169
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-4	+/-4.3	+/- 9.9	+/- 5.1	5.2	7.3



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

	2010	2012	2014	2016	2018	2020
Population	819 140	862 011	858 000	848 319	864 236	888 005
GDP PIB € m	19 300	19 467	17 567	17 637	19 571	22 287
GDP/PIB head/habitant €	23 561	22 583	20 474	20 791	22 645	25 098
Construction € m	3 930	2 786	1 832	2 056	2 490	3 904

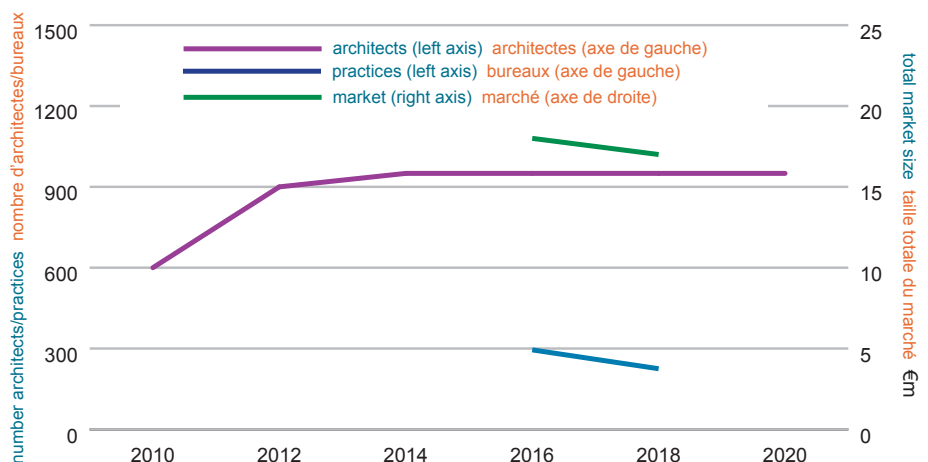
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	600	900	950	950	950	950
% Male Homme	n/a	n/a	n/a	54	80	n/a
% Female Femme	n/a	n/a	n/a	46	20	n/a
% <40 years <40 ans	n/a	n/a	n/a	58	50	n/a
Practices Bureaux	n/a	n/a	n/a	295	225	n/a

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	n/a	n/a	18	17	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	n/a	n/a	n/a
6 - 10 persons personnes	n/a	n/a	n/a	150 000	n/a	n/a

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	n/a	30	29	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	9	29	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	34	29	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	2	5	n/a
Freelance Indépendant	n/a	n/a	n/a	9	5	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	6	0	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	4	5	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	7	0	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	n/a	15 000	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	42 500	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	1 900	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	n/a	n/a	59	21	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	+/- 12.4	21.2	n/a

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

	2010	2012	2014	2016	2018	2020
Population	10 506 813	10 504 203	10 512 419	10 553 843	10 610 055	10 693 939
GDP PIB € m	145 955	154 913	149 491	166 964	191 643	223 945
GDP/PIB head/habitant €	13 891	14 748	14 220	15 820	18 062	20 941
Construction € m	28 987	27 124	27 514	23 658	31 278	37 164

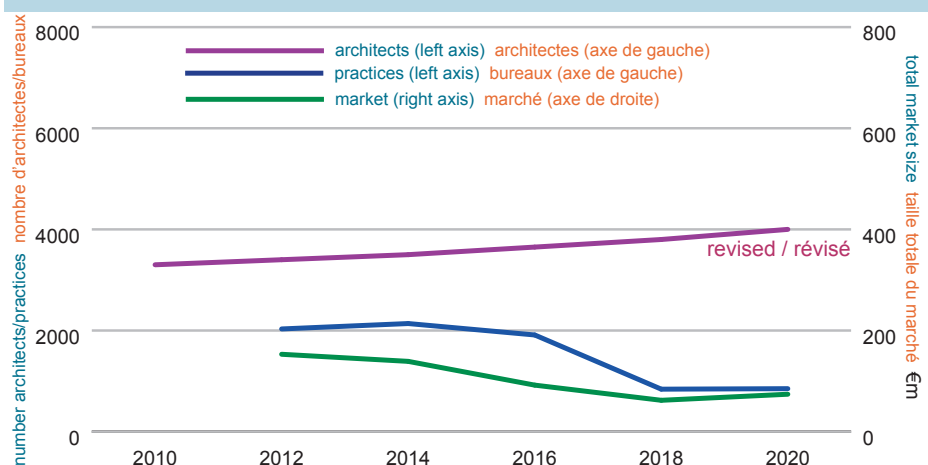
 Architectural Profession Profession d'architecte * 2012 data revised
 ** 2018 data revised

	2010	2012	2014	2016	2018	2020
Architects Architectes	3 300	8 000*	8 200	8 300	3 800**	4 000
% Male Homme	70	68	62	64	78	71
% Female Femme	30	32	38	36	22	29
% <40 years <40 ans	25	29	46	52	32	32
Practices Bureaux	756	2 031	2 138	1 912	840	850

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	73	153	139	92	62	74
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	48 487	57 967	n/a	n/a	n/a	30 118
6 - 10 persons personnes	380 286	259 958	n/a	n/a	156 584	184 213

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2020	2018
Sole Principals Dirigeant unique	32	30	8	31	32	39
Partners & Directors Associé dirigeant	9	8	17	5	7	10
Private practice Salaried Salarié – Secteur privé	21	30	42	15	24	26
Private in-house L'industrie / commerce	0	0	0	0	0	0
Freelance Indépendant	31	27	17	37	28	13
Other Private Autres – Secteur privé	1	1	8	5	1	3
Local / central government Collectivité locale / gouvernement	4	3	0	2	5	4
Other Public Autre – secteur public	3	1	8	5	3	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	14 570	18 107	n/a	11 089	13 826	19 473
Partners & Directors Associé dirigeant	19 427	26 154	n/a	n/a	25 315	32 520
Private practice Salaried Salarié – Secteur privé	15 271	14 485	4 915	12 531	19 473	19 999
Private in-house L'industrie / commerce	14 165	13 294	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	12 011	n/a	6 653	17 526	15 578
Other Private Autres – Secteur privé	16 998	14 485	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	14 570	14 888	n/a	n/a	24 146	22 764
Other Public Autre – secteur public	15 015	14 888	n/a	n/a	n/a	23 367

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	488	446	13	59	153	213
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-4	+/-4.3	+/- 27.2	+/- 12.7	7.8	6.5

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

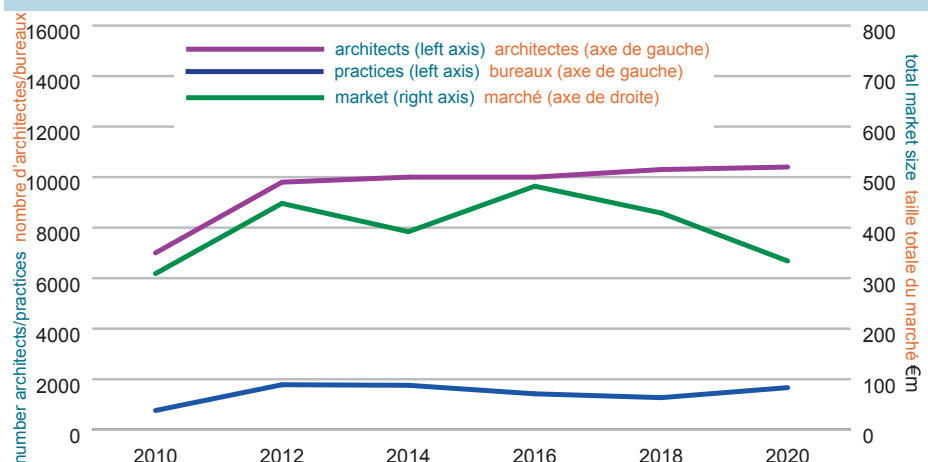
	2010	2012	2014	2016	2018	2020
Population	5 534 738	5 580 516	5 627 235	5 707 251	5 781 190	5 822 763
GDP PIB € m	228 371	239 245	248 975	266 179	288 981	312 747
GDP/PIB head/habitant €	41 261	42 871	44 245	46 639	49 986	53 711
Construction € m	20 518	24 924	25 364	31 242	33 425	42 571

Architectural Profession / **Profession d'architecte** * 2012 data revised

	2010	2012	2014	2016	2018	2020
Architects Architectes	7 000	9 800*	10 000	10 000	10 300	10 400
% Male Homme	56	56	50	54	56	49
% Female Femme	44	44	50	46	44	51
% <40 years <40 ans	33	27	26	28	26	31
Practices Bureaux	762	1 782	1 759	1 422	1 271	1 667

Architectural Market / **Marché de l'architecture**

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	309	448	392	482	429	334
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	129 768	160 624	151 768	160 743	n/a	68 485
6 - 10 persons personnes	1 138 352	771 921	n/a	1 004 374	n/a	554 770

Trends 2010-20 / **Tendances 2010-20**

Field of Employment / **Domaine d'activité**

	per cent / pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	12	12	8	11	11	10
Partners & Directors Associé dirigeant	16	13	9	10	9	5
Private practice Salaried Salarié – Secteur privé	26	29	34	33	32	37
Private in-house L'industrie / commerce	2	2	2	1	3	1
Freelance Indépendant	3	1	1	2	2	1
Other Private Autres – Secteur privé	7	8	5	14	9	10
Local / central government Collectivité locale / gouvernement	23	25	26	19	24	25
Other Public Autre – secteur public	12	10	15	10	10	12

Earnings / **Revenus**

	Average earnings €* / Revenu moyen en €*					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	60 449	62 513	53 590	51 051	61 513	75834
Partners & Directors Associé dirigeant	67 165	69 907	80 385	84 502	77 847	26173
Private practice Salaried Salarié – Secteur privé	48 359	60 496	53 858	50 782	59 190	54922
Private in-house L'industrie / commerce	19 478	30 961	n/a	n/a	n/a	n/a
Freelance Indépendant	13 433	64 664	93 783	21 600	n/a	n/a
Other Private Autres – Secteur privé	54 538	53 774	62 762	50 651	80 531	91269
Local / central government Collectivité locale / gouvernement	56 419	63 050	56 270	52 797	48 117	67109
Other Public Autre – secteur public	54 721	60 496	64 308	55 753	6 979	28857

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

Response / **Réponse**

	2010	2012	2014	2016	2018	2020
Participants Répondants	454	743	529	459	247	156
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-4	+/-3.4	+/- 4.1	+/- 4.5	6.2	7.8

Social & Economic Social & Economique

	2010	2012	2014	2016	2018	2020
Population	1 340 127	1 339 662	1 315 819	1 315 944	1 319 133	1 328 976
GDP PIB € m	13 846	15 951	18 613	20 252	23 615	28 112
GDP/PIB head/habitant €	10 332	11 907	14 146	15 389	17 902	21 153
Construction € m	1 843	2 572	3 208	2 768	4 574	4 439

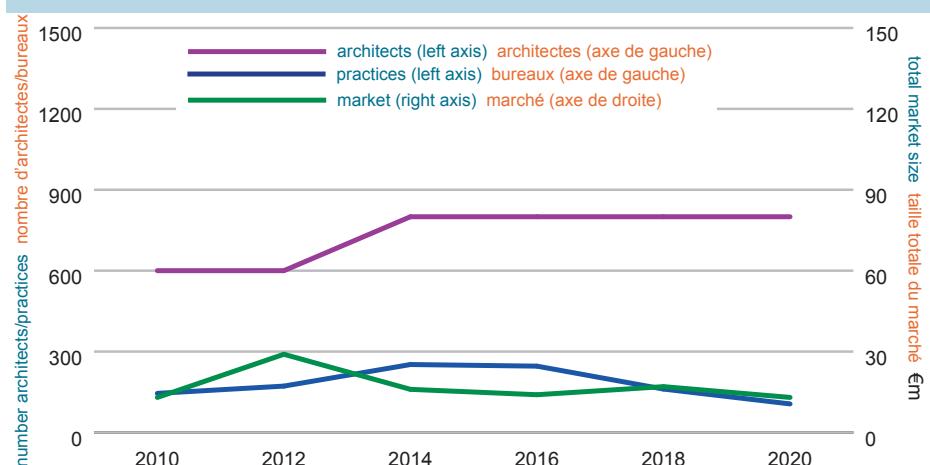
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	600	600	800	800	800	800
% Male Homme	67	69	85	73	74	73
% Female Femme	33	31	15	27	26	27
% <40 years <40 ans	29	12	30	32	19	20
Practices Bureaux	145	172	252	246	161	106

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	13	29	16	14	17	13
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	57 574	31 250	n/a	n/a	50 000
6 - 10 persons personnes	n/a	116 288	221 324	280 000	n/a	200 000

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	28	26	35	15	27	27
Partners & Directors Associé dirigeant	9	21	29	36	9	27
Private practice Salaried Salarié – Secteur privé	41	47	35	27	41	36
Private in-house L'industrie / commerce	0	0	0	0	0	0
Freelance Indépendant	6	5	0	4	9	0
Other Private Autres – Secteur privé	3	0	0	0	5	0
Local / central government Collectivité locale / gouvernement	9	2	0	4	9	9
Other Public Autre – secteur public	3	0	0	15	0	0

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	7 200	35 500	n/a	n/a	n/a
Partners & Directors Associé dirigeant	n/a	20 000	13 000	22 000	n/a	n/a
Private practice Salaried Salarié – Secteur privé	11 504	13 500	17 750	15 000	18 100	n/a
Private in-house L'industrie / commerce	n/a	10 000	n/a	n/a	n/a	n/a
Freelance Indépendant	15 786	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	11 504	10 080	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	33	51	20	55	23	11
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-17	+/-13.1	+/- 21.7	+/- 12.8	20.2	29.4

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	5 351 427	5 401 267	5 451 270	5 487 308	5 513 130	5 525 292
GDP PIB € m	176 132	189 368	193 443	209 149	223 843	240 556
GDP/PIB head/habitant €	32 913	35 060	35 486	38 115	40 602	43 537
Construction € m	32 298	33 922	30 292	30 558	33 745	40 334

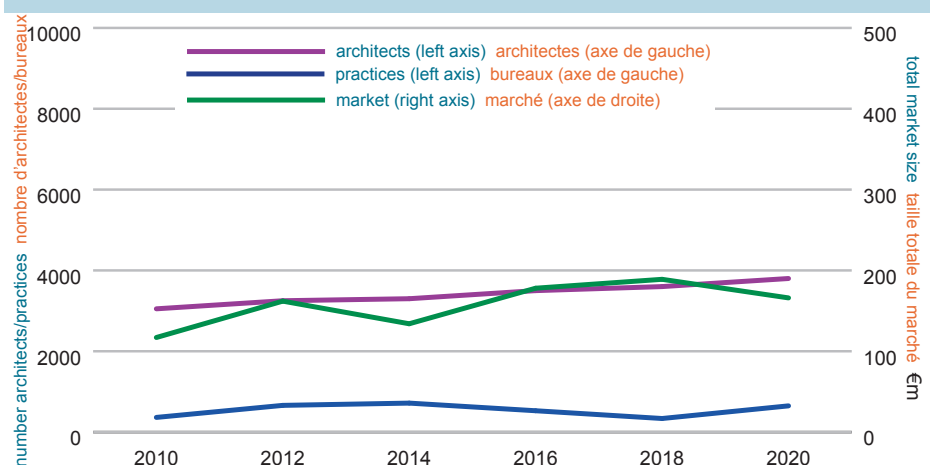
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	3 050	3 250	3 300	3 500	3 600	3 800
% Male Homme	56	54	53	47	48	46
% Female Femme	44	46	47	53	52	53
% <40 years <40 ans	26	27	20	25	19	23
Practices Bureaux	363	661	717	528	336	649

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	117	162	134	178	189	166
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	164 423	131 209	155 000	173 545	n/a	105 643
6 - 10 persons personnes	501 783	629 257	1 082 500	701 972	600 778	714 173

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	15	13	15	12	9	9
Partners & Directors Associé dirigeant	14	11	5	9	7	16
Private practice Salaried Salaré – Secteur privé	29	40	39	38	43	39
Private in-house L'industrie / commerce	1	1	1	0	1	2
Freelance Indépendant	2	0	1	1	0	0
Other Private Autres – Secteur privé	3	3	5	4	5	2
Local / central government Collectivité locale / gouvernement	26	21	26	25	9	24
Other Public Autre – secteur public	11	11	9	11	25	8

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	45 000	50 000	49 500	54 500	77 500	70 000
Partners & Directors Associé dirigeant	52 000	70 000	80 000	74 000	90 000	80 423
Private practice Salaried Salaré – Secteur privé	42 500	42 500	45 500	45 750	50 000	51 725
Private in-house L'industrie / commerce	25 000	n/a	n/a	n/a	n/a	68 500
Freelance Indépendant	44 000	36 600	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	47 000	49 000	50 250	55 900	74 100	50 000
Local / central government Collectivité locale / gouvernement	46 250	52 000	50 750	50 000	52 500	54 000
Other Public Autre – secteur public	45 000	48 000	53 000	54 000	50 000	59 000

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	560	384	411	418	271	219
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-4	+/-4.7	+/- 4.5	+/- 4.5	5.7	6.4

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

	2010	2012	2014	2016	2018	2020
Population	64 713 762	65 397 912	65 856 609	66 661 621	67 221 943	67 098 824
GDP PIB € m	1 946 564	1 996 583	2 059 852	2 181 064	2 291 705	2 425 708
GDP/PIB head/habitant €	30 080	30 530	31 278	32 718	34 092	36 151
Construction € m	245 485	241 930	271 139	282 377	276 669	311 348

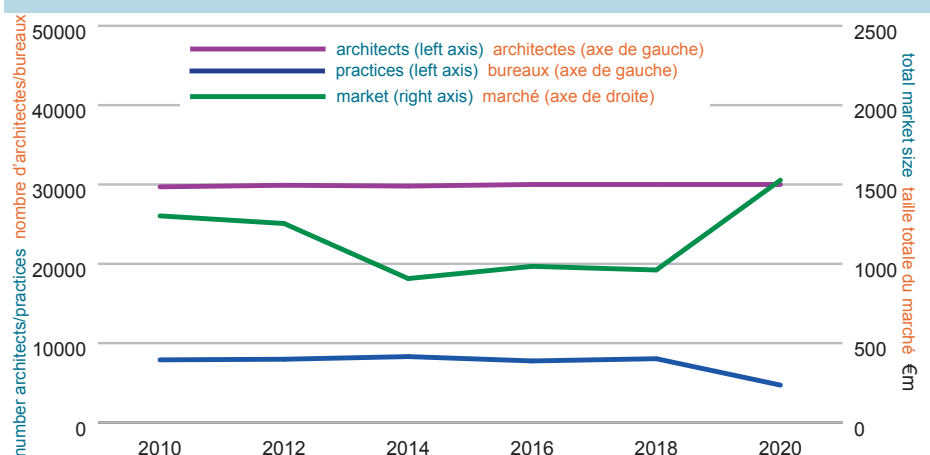
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	29 700	29 900	29 800	30 000	30 000	30 000
% Male Homme	73	67	62	64	63	60
% Female Femme	27	33	38	36	37	40
% <40 years <40 ans	29	30	24	34	25	29
Practices Bureaux	7 891	7 968	8 302	7 753	8 033	4 708

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	1 302	1 254	908	984	961	1 527
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	196 787	169 294	177 150	120 936	117 254	133 002
6 - 10 persons personnes	774 945	883 467	812 891	837 225	696 475	804 667

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	28	26	29	26	37	55
Partners & Directors Associé dirigeant	5	5	6	6	6	7
Private practice Salaried Salié – Secteur privé	16	17	20	17	18	23
Private in-house L'industrie / commerce	0	0	1	0	0	0
Freelance Indépendant	21	20	19	27	28	4
Other Private Autres – Secteur privé	23	26	20	18	5	4
Local / central government Collectivité locale / gouvernement	2	3	2	3	2	2
Other Public Autre – secteur public	4	4	3	2	5	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	30 000	30 000	30 000	25 000	30 000	30 000
Partners & Directors Associé dirigeant	33 000	42 000	45 000	39 022	38 164	36 000
Private practice Salaried Salié – Secteur privé	39 000	38 000	30 000	41 432	36 000	38 039
Private in-house L'industrie / commerce	28 000	25 000	n/a	n/a	n/a	n/a
Freelance Indépendant	32 250	32 500	22 474	24 000	27 000	22 000
Other Private Autres – Secteur privé	41 400	37 200	30 500	26 000	41 000	26 500
Local / central government Collectivité locale / gouvernement	36 600	47 714	40 500	41 500	45 000	45 000
Other Public Autre – secteur public	33 000	30 250	42 030	34 650	43 000	42 000

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	1 202	957	690	1 018	1 551	750
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-2	+/- 3.1	+/- 3.7	+/- 3.0	2.4	3.5

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	81 802 257	81 843 743	80 780 000	82 162 000	82 850 000	83 166 711
GDP PIB € m	2 432 382	2 592 600	2 737 600	3 032 820	3 277 340	3 449 050
GDP/PIB head/habitant €	29 735	31 677	33 890	36 913	39 558	41 472
Construction € m	225 973	247 633	250 337	279 619	306 168	368 471

Architectural Profession Profession d'architecte

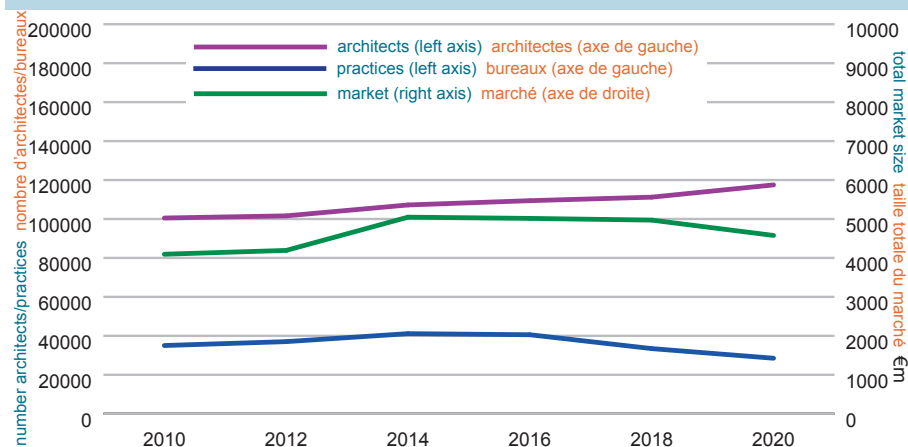
	2010	2012	2014	2016*	2018*	2020*
Architects Architectes	100 500	101 600	107 200	109 200	111 200	117 500
% Male Homme	79	64	57	66	62	66
% Female Femme	21	36	43	34	38	34
% <40 years <40 ans	14	35	41	23	21	25
Practices Bureaux	35 021	37 026	41 117	40 558	33 440	28 492

* 2016-2020 - source: BAK survey * 2016-2020 - source: enquête BAK

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	4 095	4 193	5 047	5 015	4 971	4 577
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	86 449	94 088	114 326	154 763	181 955	169 809
6 - 10 persons personnes	633 444	440 416	623 935	654 293	786 041	811 537

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016*	2018*	2020*
Sole Principals Dirigeant unique	62	32	20	27	24	22
Partners & Directors Associé dirigeant	10	14	8	10	10	9
Private practice Salaried Salarié – Secteur privé	14	26	40	33	34	37
Private in-house L'industrie / commerce	3	7	8	12	14	13
Freelance Indépendant	3	4	1	4	2	2
Other Private Autres – Secteur privé	2	6	6	n/a	1	1
Local / central government Collectivité locale / gouvernement	2	8	12	14	14	14
Other Public Autre – secteur public	2	4	4		1	1

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

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016**	2018**	2020**
Sole Principals Dirigeant unique	43 500	50 000	55 000	55 940	63 202	68 262
Partners & Directors Associé dirigeant	50 000	60 000	70 660	65 100	74 500	90 000
Private practice Salaried Salarié – Secteur privé	34 290	37 200	36 000	n/a	48 000	50 000
Private in-house L'industrie / commerce	25 000	40 000	n/a	n/a	72 000	75 000
Freelance Indépendant	50 000	54 500	67 000	39 012	40 000	49 000
Other Private Autres – Secteur privé	42 976	50 000	58 500	n/a	61 331	70 000
Local / central government Collectivité locale / gouvernement	48 100	50 000	53 000	n/a	60 397	64 000
Other Public Autre – secteur public	42 488	48 000	55 000	n/a	65 000	70 000

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

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	393	840	1 392	6 029	13 120	14 064
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 5	+/- 3.4	+/- 2.6	+/- 1.2	0.8	0.8

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	11 295 002	11 290 785	10 992 589	10 793 526	10 738 868	10 709 739
GDP PIB € m	232 767	215 088	182 054	175 697	180 218	187 457
GDP/PIB head/habitant €	20 608	19 050	16 562	16 278	16 782	17 503
Construction € m	19 573	12 110	10 927	12 926	9621	11 342

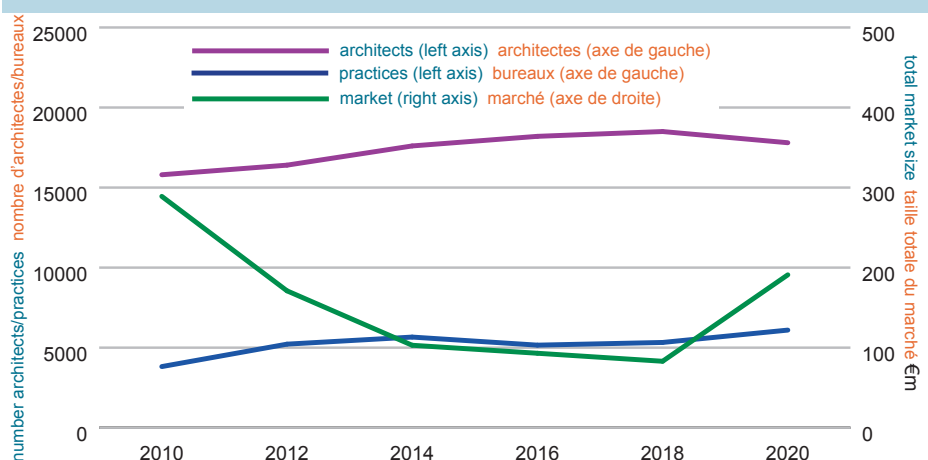
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	15 800	16 400	17 600	18 200	18 500	17 800
% Male Homme	43	41	42	n/a	45	43
% Female Femme	57	59	58	n/a	55	57
% <40 years <40 ans	52	56	50	n/a	39	42
Practices Bureaux	3 818	5 219	5 661	n/a	5 325	6 097

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	289	171	103	n/a	83	191
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	50 720	33 861	18 929	n/a	18 833	37 500
6 - 10 persons personnes	190 067	71 500	55 643	n/a	n/a	356 667

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	49	56	51	n/a	44	56
Partners & Directors Associé dirigeant	5	6	6	n/a	2	2
Private practice Salaried Salarié – Secteur privé	17	14	16	n/a	21	22
Private in-house L'industrie / commerce	0	0	1	n/a	0	0
Freelance Indépendant	9	6	9	n/a	10	9
Other Private Autres – Secteur privé	3	3	2	n/a	3	1
Local / central government Collectivité locale / gouvernement	10	7	8	n/a	11	7
Other Public Autre – secteur public	7	8	8	n/a	7	3

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2008	2010	2012	2014	2016	2020
Sole Principals Dirigeant unique	30 000	20 000	12 000	n/a	10 000	15 000
Partners & Directors Associé dirigeant	42 500	22 500	30 000	n/a	n/a	22 000
Private practice Salaried Salarié – Secteur privé	14 700	13 200	13 200	n/a	13 500	12 000
Private in-house L'industrie / commerce	13 100	10 000	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	13 200	10 000	n/a	7 500	9 500
Other Private Autres – Secteur privé	20 000	19 000	13 500	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	20 000	20 000	21 600	n/a	15 000	16 000
Other Public Autre – secteur public	20 000	18 000	19 320	n/a	15 000	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	314	490	344	n/a	299	194
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-6	+/- 4.4	+/- 5.2	n/a	5.6	7

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	10 013 000	9 962 000	9 879 000	9 830 485	9 778 371	9 769 526
GDP PIB € m	97 095	100 513	97 948	109 674	124 050	146 062
GDP/PIB head/habitant €	9 697	10 090	9 915	11 157	12 686	14 951
Construction € m	8 131	7 496	8 520	7 559	14 655	18 105

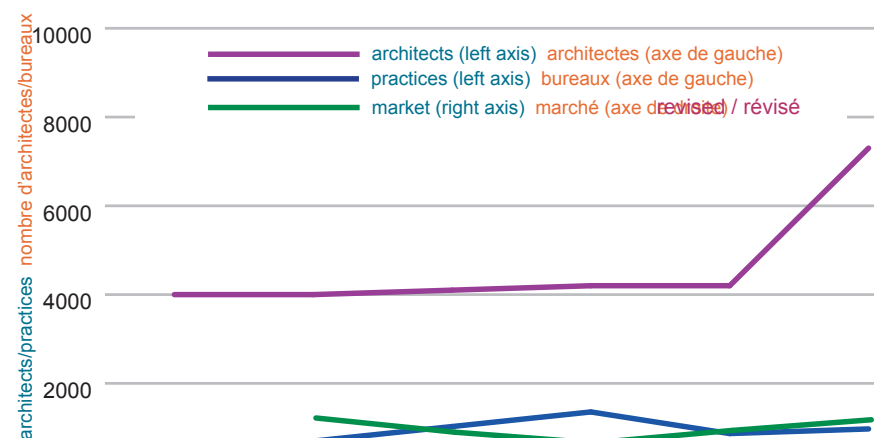
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	4 000	4 000	4 100	4 200	4 200	7 300
% Male Homme	n/a	67	n/a	72	75	71
% Female Femme	n/a	33	n/a	28	25	29
% <40 years <40 ans	n/a	27	n/a	25	n/a	12
Practices Bureaux	n/a	699	n/a	1 356	869	973

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	61	n/a	33	47	59
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	17 311	n/a	32 253	30 442	41 440
6 - 10 persons personnes	n/a	146 850	n/a	n/a	n/a	462 215

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	25	n/a	5	14	31
Partners & Directors Associé dirigeant	n/a	9	n/a	1	7	7
Private practice Salaried Salarié – Secteur privé	n/a	27	n/a	19	50	14
Private in-house L'industrie / commerce	n/a	5	n/a	1	2	2
Freelance Indépendant	n/a	8	n/a	11	13	7
Other Private Autres – Secteur privé	n/a	3	n/a	39	4	17
Local / central government Collectivité locale / gouvernement	n/a	12	n/a	13	5	10
Other Public Autre – secteur public	n/a	11	n/a	12	5	12

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	8 021	n/a	12 819	n/a	24 067
Partners & Directors Associé dirigeant	n/a	7 528	n/a	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	7 810	n/a	10 896	11 476	n/a
Private in-house L'industrie / commerce	n/a	6 332	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	14 072	n/a	n/a	24 226	n/a
Other Private Autres – Secteur privé	n/a	12 664	n/a	9 614	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	10 554	n/a	11 537	n/a	n/a
Other Public Autre – secteur public	n/a	8 795	n/a	9 614	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	191	n/a	158	56	47
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/- 6.9	n/a	+/- 7.6	13.0	14.2

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	4 455 780	4 495 351	4 604 029	4 658 530	4 838 259	4 963 839
GDP PIB € m	155 491	156 438	164 050	255 815	294 110	356 051
GDP/PIB head/habitant €	34 896	34 800	35 632	54 913	60 788	71 729
Construction € m	14 250	11 662	10 301	24 200	24 519	28 873

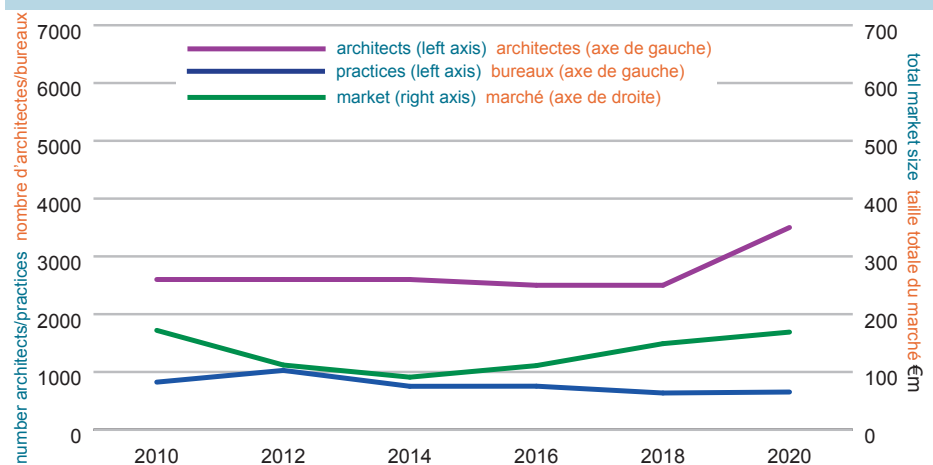
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	2 600	2 600	2 600	2 500	2 500	3 500
% Male Homme	70	69	71	68	69	62
% Female Femme	30	31	29	32	31	37
% <40 years <40 ans	42	36	19	26	28	28
Practices Bureaux	824	1 027	752	754	636	653

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	172	112	91	111	149	169
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	116 390	101 324	85 367	121 967	206 000	109 358
6 - 10 persons personnes	718 106	501 000	554 417	503 143	463 134	665 332

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	26	26	26	26	22	21
Partners & Directors Associé dirigeant	28	26	27	22	22	18
Private practice Salaried Salarié – Secteur privé	26	26	25	32	43	39
Private in-house L'industrie / commerce	1	0	0	0	1	1
Freelance Indépendant	3	2	2	3	1	1
Other Private Autres – Secteur privé	2	4	0	2	2	2
Local / central government Collectivité locale / gouvernement	9	9	13	9	7	13
Other Public Autre – secteur public	6	6	3	4	3	4

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	40 000	25 000	35 000	40 000	50 000	57 500
Partners & Directors Associé dirigeant	55 000	45 000	45 000	58 000	60 000	79 408
Private practice Salaried Salarié – Secteur privé	45 000	42 000	43 000	44 343	48 000	50 000
Private in-house L'industrie / commerce	23 500	31 000	n/a	n/a	n/a	n/a
Freelance Indépendant	66 500	55 194	22 500	n/a	n/a	n/a
Other Private Autres – Secteur privé	72 000	76 000	n/a	52 000	n/a	55 500
Local / central government Collectivité locale / gouvernement	74 000	71 000	67 550	69 000	70 000	65 000
Other Public Autre – secteur public	50 250	43 000	70 000	56 500	73 000	74 750

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	547	361	267	322	162	403
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 4	+/- 4.8	+/- 5.7	+/- 5.1	7.4	4.6

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	60 340 328	60 850 782	60 782 668	60 665 551	60 483 973	60 244 639
GDP PIB € m	1 553 350	1 580 220	1 560 024	1 642 444	1 724 955	1 789 747
GDP/PIB head/habitant €	25 743	25 969	25 666	27 074	28 519	29 708
Construction € m	185 616	180 233	184 111	202 126	195 035	193 859

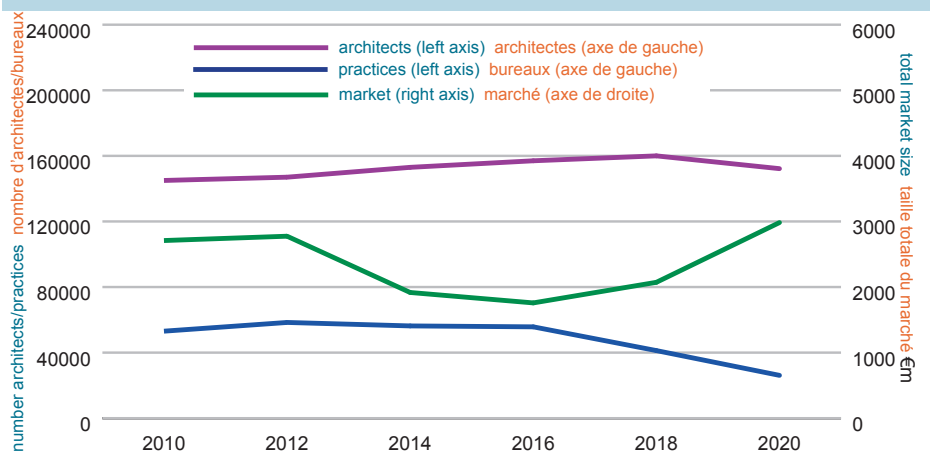
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	145 000	147 000	153 000	157 000	160 000	152 200
% Male Homme	70	63	62	59	57	56
% Female Femme	30	37	38	41	43	44
% <40 years <40 ans	58	34	23	28	27	35
Practices Bureaux	53 081	58 397	56 284	55 720	41 242	26 134

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	2 709	2 775	1 917	1 758	2 072	2 983
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	52 108	60 380	50 006	49 171	51 843	76 913
6 - 10 persons personnes	470 573	253 669	208 189	164 400	139 833	385 514

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	39	46	47	39	34	39
Partners & Directors Associé dirigeant	10	6	6	4	5	4
Private practice Salaried Salarié – Secteur privé	20	17	15	13	13	16
Private in-house L'industrie / commerce	1	2	2	2	2	2
Freelance Indépendant	16	13	13	20	21	13
Other Private Autres – Secteur privé	9	9	8	10	10	13
Local / central government Collectivité locale / gouvernement	3	4	5	5	6	5
Other Public Autre – secteur public	2	4	4	6	9	7

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	20 000	27 000	30 000	27 500	27 500	30 000
Partners & Directors Associé dirigeant	27 900	34 500	36 000	35 000	30 000	45 000
Private practice Salaried Salarié – Secteur privé	15 750	24 000	27 778	24 000	22 000	25 000
Private in-house L'industrie / commerce	15 000	20 000	n/a	25 000	28 000	28 000
Freelance Indépendant	22 000	25 000	20 000	18 000	20 000	21 800
Other Private Autres – Secteur privé	30 000	30 000	26 000	22 000	21 000	25 000
Local / central government Collectivité locale / gouvernement	n/a	28 000	30 000	30 000	30 000	25 000
Other Public Autre – secteur public	20 000	25 000	26 000	27 000	30 000	30 000

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	124	14 004	8 167	12 568	9 018	5 221
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 9	+/- 0.8	+/- 1.1	+/- 0.8	1.0	1.3

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

	2010	2012	2014	2016	2018	2020
Population	2 248 374	2 042 371	2 001 468	1 968 957	1 934 379	1 907 675
GDP PIB € m	16 693	21 338	23 372	24 349	27 033	30 463
GDP/PIB head/habitant €	7 425	10 447	11 677	12 366	13 975	15 969
Construction € m	3 737	3 705	5 481	3 491	6 518	6 018

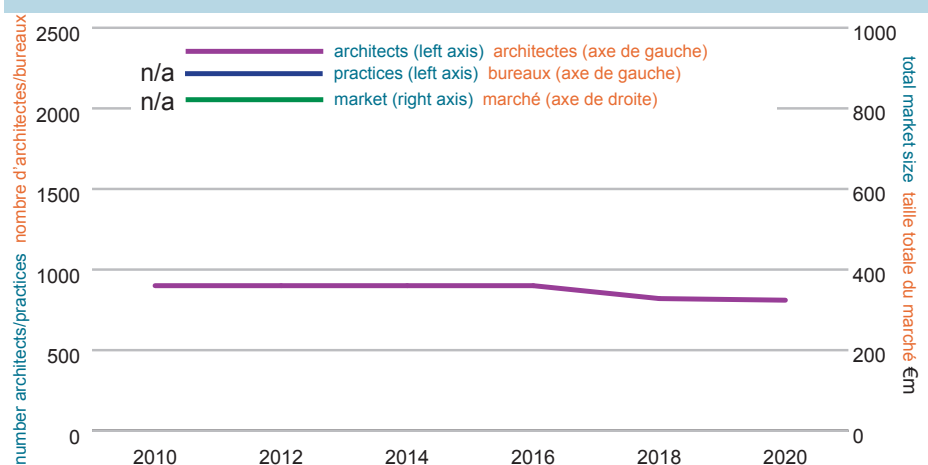
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	900	900	900	900	820	810
% Male Homme	n/a	n/a	42	n/a	n/a	n/a
% Female Femme	n/a	n/a	58	n/a	n/a	n/a
% <40 years <40 ans	n/a	n/a	29	n/a	n/a	n/a
Practices Bureaux	n/a	n/a	245	n/a	n/a	n/a

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	n/a	23	n/a	n/a	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	n/a	n/a	n/a
6 - 10 persons personnes	n/a	n/a	678 886	n/a	n/a	n/a

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	15	n/a	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	31	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	31	n/a	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	0	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	0	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	12	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	12	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	0	n/a	n/a	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	19 200	n/a	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	4 275	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	3 350	n/a	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	6 000	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	1 060	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	5	n/a	36	n/a	n/a	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-44	n/a	+/- 16.0	n/a	n/a	n/a

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	3 329 039	3 199 771	2 943 472	2 888 558	2 808 901	2 794 090
GDP PIB € m	25 820	30 705	34 631	37 331	42 191	48 797
GDP/PIB head/habitant €	7 756	9 596	11 765	12 924	15 020	17 465
Construction € m	3 203	3 378	3 733	3 479	4 984	4 869

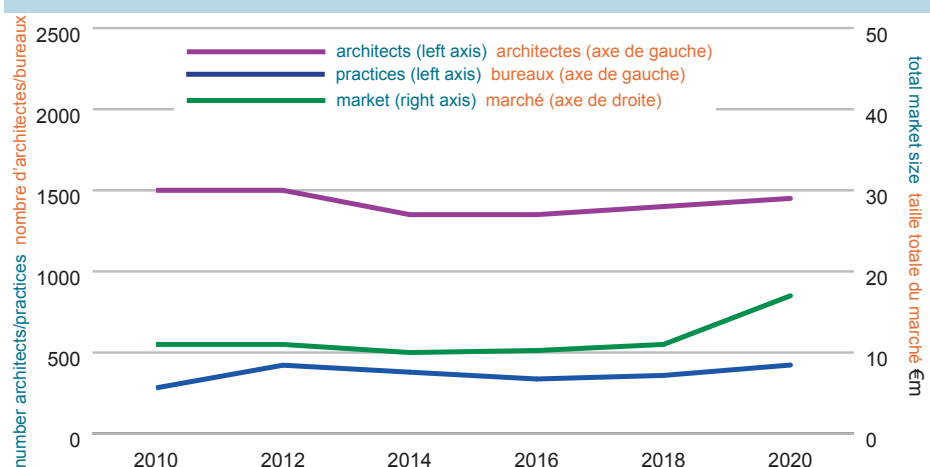
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	1 500	1 500	1 350	1 350	1 400	1 450
% Male Homme	68	86	n/a	50	52	64
% Female Femme	32	14	n/a	50	48	36
% <40 years <40 ans	36	37	n/a	38	43	n/a
Practices Bureaux	282	422	n/a	337	359	423

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	11	10	n/a	11	17	21
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	29 148	n/a	n/a	26 566	25 106	50 000
6 - 10 persons personnes	82 324	n/a	n/a	178 349	119 063	550 000

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	28	24	n/a	14	21	8
Partners & Directors Associé dirigeant	28	43	n/a	3	12	31
Private practice Salaried Salarié – Secteur privé	20	19	n/a	22	43	31
Private in-house L'industrie / commerce	4	0	n/a	0	1	0
Freelance Indépendant	8	5	n/a	15	14	23
Other Private Autres – Secteur privé	8	5	n/a	36	1	0
Local / central government Collectivité locale / gouvernement	4	5	n/a	6	2	8
Other Public Autre – secteur public	0	0	n/a	5	5	0

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	8 689	n/a	n/a	n/a	15 000	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	18 000	n/a
Private practice Salaried Salarié – Secteur privé	5 792	n/a	n/a	n/a	12 000	15 000
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	10 000	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	6 951	n/a	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	26	22	n/a	143	122	17
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-19	+/- 20.7	n/a	+/- 7.8	8.5	23.6

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	502 066	524 853	549 680	576 249	602 005	626 108
GDP PIB € m	40 267	42 822	45 478	51 216	55 299	63 516
GDP/PIB head/habitant €	80 202	81 588	82 736	88 879	91 859	101 446
Construction € m	5 202	5 306	5 579	7 284	7 616	8 629

Architectural Profession Profession d'architecte

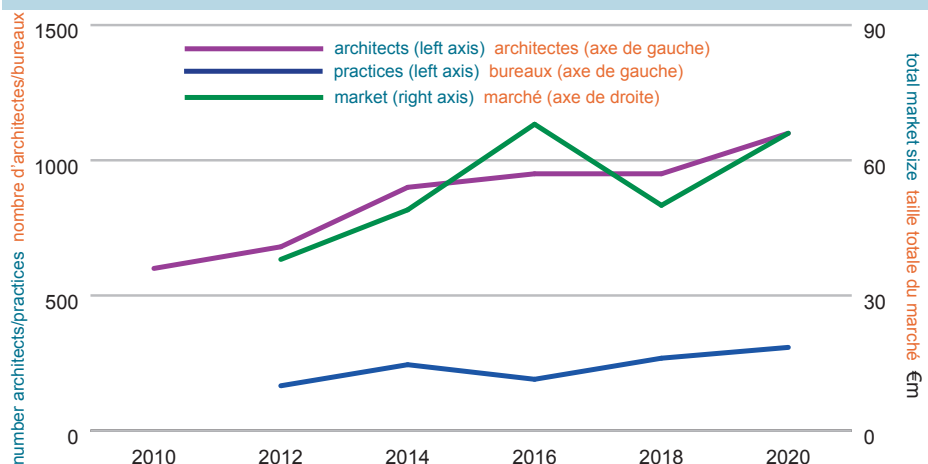
	2010	2012	2014	2016	2018	2020
Architects Architectes *	600	680	900	950	950	1 100
% Male Homme	n/a	72	75	74	68	68
% Female Femme	n/a	28	25	26	32	31
% <40 years <40 ans	0	38	22	14	22	28
Practices Bureaux	n/a	166	244	190	268	308

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

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	38	49	68	50	66
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	154 000	231 165	138 750	n/a	140 569
6 - 10 persons personnes	n/a	683 115	486 532	443 100	n/a	574 571

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	39	34	22	39	56
Partners & Directors Associé dirigeant	n/a	24	28	39	25	21
Private practice Salaried Salarié – Secteur privé	n/a	10	19	14	18	16
Private in-house L'industrie / commerce	n/a	0	0	1	0	0
Freelance Indépendant	n/a	9	9	8	14	5
Other Private Autres – Secteur privé	n/a	19	9	15	0	1
Local / central government Collectivité locale / gouvernement	n/a	0	0	0	0	0
Other Public Autre – secteur public	n/a	0	0	0	4	0

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	56 000	56 000	52 050	50 000	68 500
Partners & Directors Associé dirigeant	n/a	75 000	70 000	88 000	82 500	96 000
Private practice Salaried Salarié – Secteur privé	n/a	82 000	48 000	90 750	100 000	50 000
Private in-house L'industrie / commerce	n/a	31 000	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	50 000	57 000	60 000	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	60 000	80 000	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	56 400	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	89	130	86	28	80
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/- 9.7	+/- 8.0	+/- 10.1	18.3	10.6

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

	2010	2012	2014	2016	2018	2020
Population	414 372	420 085	425 384	434 403	475 701	514 564
GDP PIB € m	6 235	6 499	7 263	8 788	11 140	13 390
GDP/PIB head/habitant €	15 046	15 471	17 073	20 231	23 417	26 022
Construction € m	503	501	744	1 043	1 300	1 942

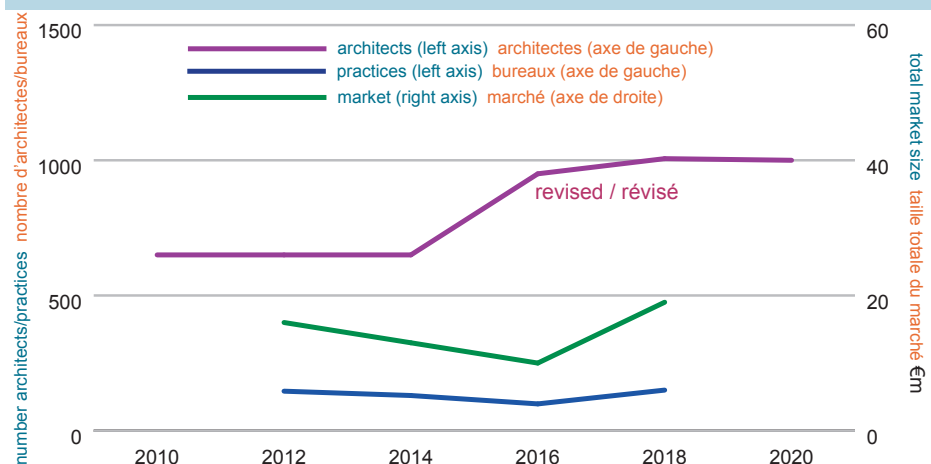
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	650	650	650	650-950*	1 000	1 000
% Male Homme	n/a	76	73	64	64	n/a
% Female Femme	n/a	24	27	36	36	n/a
% <40 years <40 ans	0	56	52	58	67	n/a
Practices Bureaux	n/a	146	130	99	150	n/a

* revised

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	16	13	10	19	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	86 125	24 500	n/a	n/a	n/a
6 - 10 persons personnes	n/a	n/a	375 000	n/a	n/a	n/a

Trends 2010-20 Tendances 2010-20

Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	18	17	9	21	n/a
Partners & Directors Associé dirigeant	n/a	16	5	5	8	n/a
Private practice Salaried Salarié – Secteur privé	n/a	29	35	41	41	n/a
Private in-house L'industrie / commerce	n/a	0	6	0	2	n/a
Freelance Indépendant	n/a	3	6	5	3	n/a
Other Private Autres – Secteur privé	n/a	11	6	7	8	n/a
Local / central government Collectivité locale / gouvernement	n/a	8	19	18	8	n/a
Other Public Autre – secteur public	n/a	16	5	16	11	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	25 000	25 000	n/a	45 000	n/a
Partners & Directors Associé dirigeant	n/a	45 000	57 500	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	25 000	21 750	21 300	25 000	n/a
Private in-house L'industrie / commerce	n/a	50 000	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	45 000	40 843	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	25 000	32 500	n/a	47 919	n/a
Local / central government Collectivité locale / gouvernement	n/a	21 300	30 000	28 950	28 000	n/a
Other Public Autre – secteur public	n/a	25 000	40 000	38 500	26 500	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	41	74	45	66	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/- 14.8	+/- 10.7	+/- 14.1	11.7	n/a



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

	2010	2012	2014	2016	2018	2020
Population	16 577 612	16 730 348	16 829 289	16 979 120	17 118 084	17 407 585
GDP PIB € m	585 318	606 111	602 658	676 531	737 048	810 247
GDP/PIB head/habitant €	35 308	36 228	35 810	39 845	43 057	46 546
Construction € m	75 162	76 913	70 385	100 870	107 798	117 097

Architectural Profession Profession d'architecte

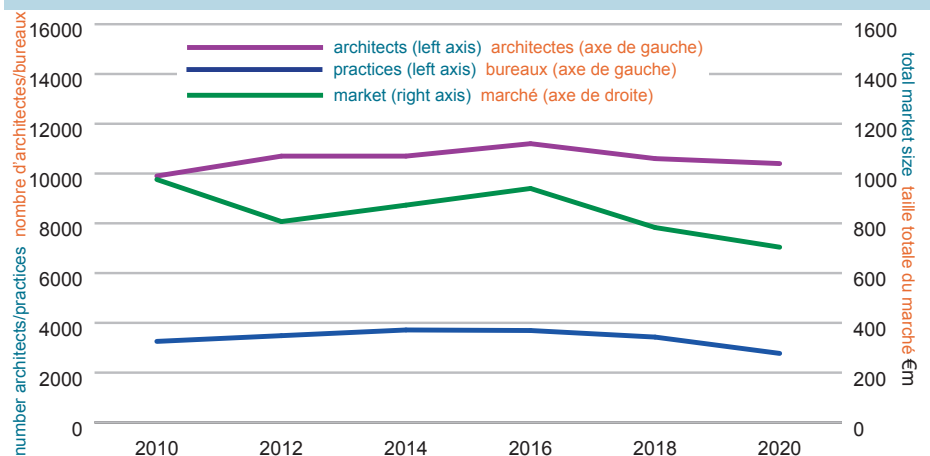
	2010	2012*	2014*	2016	2018	2020
Architects Architectes	9900	10 700	10 900	11 200	10 600	10 400
% Male Homme	81	79	79	80	77	70
% Female Femme	19	21	21	20	23	30
% <40 years <40 ans	32	35	35	39	25	26
Practices Bureaux	3255	n/a	3 714	3 692	3 428	2 772

* 2012 / 2014: BNA Annual Benchmark Research

Architectural Market Marché de l'architecture

	2010	2012*	2014*	2016	2018	2020
Market Marché (€ m)	976	807	910	940	783	704
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	228 532	85 000	105 000	134 649	105 581	140 766
6 - 10 persons personnes	835 500	550 000	560 000	520 133	531 529	709 500

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012*	2014*	2016	2018	2020
Sole Principals Dirigeant unique	20	20	20	9	28	38
Partners & Directors Associé dirigeant	21	20	18	9	18	17
Private practice Salaried Salarié – Secteur privé	8	10	10	3	18	27
Private in-house L'industrie / commerce	0	2	2	2	2	0
Freelance Indépendant	7	40	45	12	22	0
Other Private Autres – Secteur privé	41	5	2	61	4	10
Local / central government Collectivité locale / gouvernement	0	1	1	2	3	2
Other Public Autre – secteur public	3	2	2	3	5	6

* 2012 / 2014: BNA Annual Benchmark Research

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012*	2014*	2016	2018	2020
Sole Principals Dirigeant unique	45 000	41 000	40 000	50 000	60 000	77 500
Partners & Directors Associé dirigeant	71 000	70 000	70 000	56 850	60 000	56 000
Private practice Salaried Salarié – Secteur privé	60 000	41 000	40 000	47 500	45 000	35 000
Private in-house L'industrie / commerce	50 000	50 000	50 000	49 000	n/a	n/a
Freelance Indépendant	64 500	47 000	47 500	29 500	42 500	n/a
Other Private Autres – Secteur privé	n/a	44 000	45 000	40 000	50 000	n/a
Local / central government Collectivité locale / gouvernement	83 000	46 000	45 000	n/a	60 000	n/a
Other Public Autre – secteur public	55 000	55 000	55 000	62 500	55 000	n/a

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

* 2012 / 2014: BNA Annual Benchmark Research

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	214	n/a	10	482	464	49
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-7	n/a	+/- 31.0	+/- 4.4	4.4	14

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



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

	2010	2012	2014	2016	2018	2020
Population	4 858 199	4 985 870	5 107 970	5 213 985	5 295 619	5 367 580
GDP PIB € m	278 558	358 734	393 966	348 408	354 287	360 301
GDP/PIB head/habitant €	57 338	71 950	77 128	66 822	66 902	67 125
Construction € m	40 974	57 008	56 496	57 609	61 260	61 205

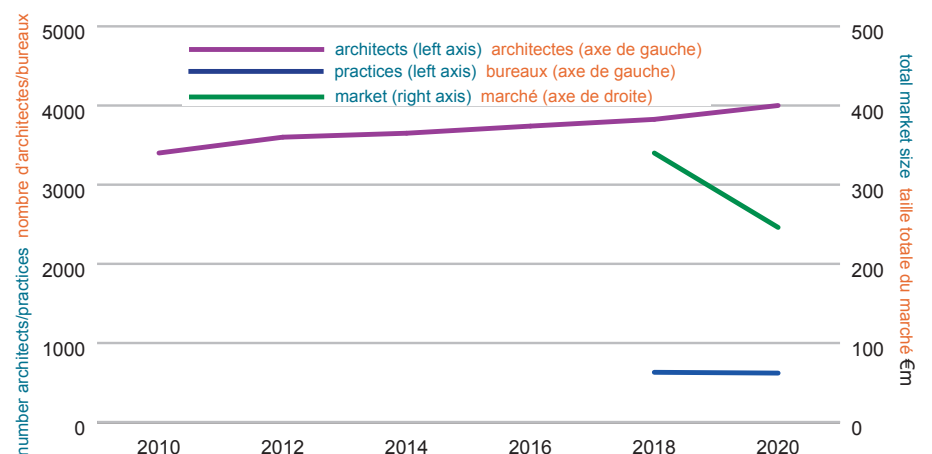
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	3400	3600	3650	3740	3825	4000
% Male Homme	n/a	n/a	n/a	n/a	47	55
% Female Femme	n/a	n/a	n/a	n/a	53	44
% <40 years <40 ans	n/a	n/a	n/a	n/a	44	30
Practices Bureaux	n/a	n/a	n/a	n/a	630	620

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	n/a	n/a	n/a	340	246
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	n/a	n/a	170 125
6 - 10 persons personnes	n/a	n/a	n/a	n/a	881 951	606 608

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	9	14
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	19	19
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	52	47
Private in-house L'industrie / commerce					0	1
Freelance Indépendant	n/a	n/a	n/a	n/a	1	2
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	3	4
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	10	10
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	5	4

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	72 174	53357
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	76 814	80423
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	66 710	71917
Private in-house L'industrie / commerce					n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	88 671	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	63 101	72432
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	60 204	77330

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	n/a	n/a	n/a	254	169
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	n/a	5.9	7.4



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

	2010	2012	2014	2016	2018	2020
Population	38 167 329	38 208 618	n/a	37 967 209	37 976 687	37 958 138
GDP PIB € m	353 306	370 014	n/a	427 737	467 167	532 329
GDP/PIB head/habitant €	9 257	9 684	n/a	11 266	12 301	14 024
Construction € m	61 695	68 723	n/a	61 170	103 477	99 256

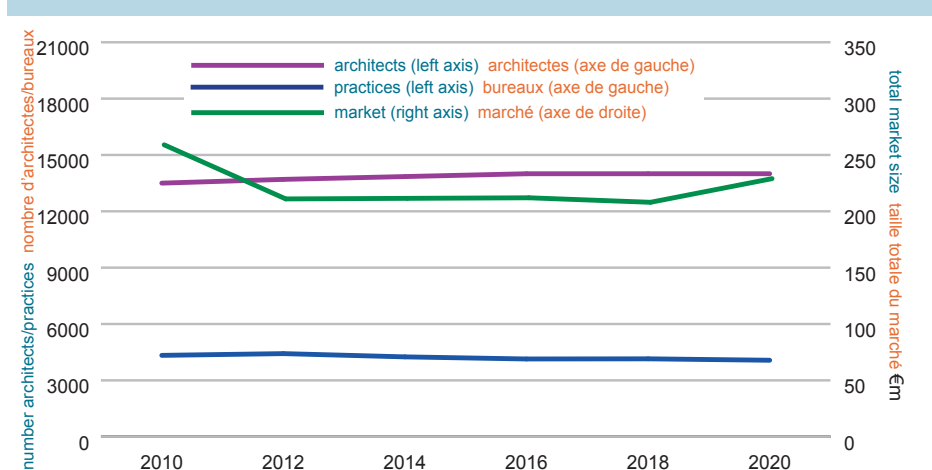
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	13 500	13 700	n/a	14 000	14 000	14 000
% Male Homme	54	55	n/a	54	59	42
% Female Femme	46	45	n/a	46	41	58
% <40 years <40 ans	54	51	n/a	66	72	70
Practices Bureaux	4 330	4 423	n/a	4 138	4 146	4 070

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	259	211	n/a	212	208	229
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	35 645	24 566	n/a	19 624	n/a	29 096
6 - 10 persons personnes	208 280	132 438	n/a	199 662	n/a	132 786

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	45	41	n/a	35	34	35
Partners & Directors Associé dirigeant	13	14	n/a	11	16	8
Private practice Salaried Salarié – Secteur privé	26	27	n/a	29	44	46
Private in-house L'industrie / commerce	1	2	n/a	0	0	1
Freelance Indépendant	5	5	n/a	12	3	5
Other Private Autres – Secteur privé	5	3	n/a	6	0	0
Local / central government Collectivité locale / gouvernement	4	5	n/a	7	0	2
Other Public Autre – secteur public	1	2	n/a	2	3	2

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	13 604	14 453	n/a	12 208	n/a	14 060
Partners & Directors Associé dirigeant	22 674	23 487	n/a	40 047	n/a	36 789
Private practice Salaried Salarié – Secteur privé	12 697	11 804	n/a	4 929	8 436	10 545
Private in-house L'industrie / commerce			n/a	n/a	n/a	n/a
Freelance Indépendant	14 864	9 154	n/a	4 381	n/a	13 076
Other Private Autres – Secteur privé	21 414	19 223	n/a	799	n/a	n/a
Local / central government Collectivité locale / gouvernement	13 730	8 672	n/a	11 078	n/a	n/a
Other Public Autre – secteur public	8 818	1 349	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	704	560	n/a	201	36	85
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-4	+/- 4.1	n/a	+/- 6.9	16.3	10.6

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	10 637 713	10 541 840	10 427 301	10 341 330	10 291 027	10 295 909
GDP PIB € m	172 670	170 907	165 690	179 540	194 614	213 301
GDP/PIB head/habitant €	16 232	16 212	15 890	17 361	18 911	20 717
Construction € m	25 246	22 671	18 710	16 342	17 832	22 425

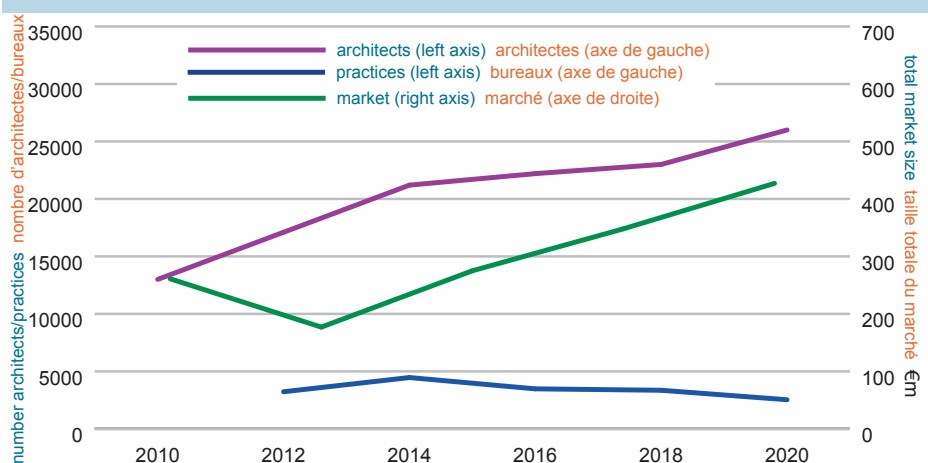
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	13 000	17 100	21 200	22 200	23 000	26 000
% Male Homme	n/a	56	57	55	54	54
% Female Femme	n/a	44	43	45	46	46
% <40 years <40 ans	n/a	73	68	53	46	50
Practices Bureaux	n/a	3 226	4 462	3 479	3 356	2 562

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	261	177	276	348	427
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	35 078	38 123	46 334	32 997	53 628
6 - 10 persons personnes	n/a	508 499	223 173	207 800	183 540	294 549

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	11	9	11	13	15
Partners & Directors Associé dirigeant	n/a	12	10	10	10	10
Private practice Salaried Salarié – Secteur privé	n/a	35	37	33	31	39
Private in-house L'industrie / commerce	n/a	1	2	1	1	1
Freelance Indépendant	n/a	15	13	18	17	12
Other Private Autres – Secteur privé	n/a	6	4	3	3	3
Local / central government Collectivité locale / gouvernement	n/a	13	21	17	18	15
Other Public Autre – secteur public	n/a	7	5	6	6	5

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	13 000	12 835	14 000	11 520	12 000
Partners & Directors Associé dirigeant	n/a	14 300	14 125	14 400	15 000	15 000
Private practice Salaried Salarié – Secteur privé	n/a	10 600	9 500	9 600	10 200	11 079
Private in-house L'industrie / commerce	n/a	10 850	n/a	n/a	10 000	14 400
Freelance Indépendant	n/a	11 900	10 833	11 000	13 200	10 000
Other Private Autres – Secteur privé	n/a	15 521	11 000	12 250	10 600	9 800
Local / central government Collectivité locale / gouvernement	n/a	18 150	16 820	16 407	16 780	16 870
Other Public Autre – secteur public	n/a	12 000	16 400	20 940	15 000	18 865

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	1 678	1 836	718	1 508	1 532
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/- 2.2	+/- 2.2	+/- 3.6	2.4	2.4

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	21 462 186	21 355 849	19 942 642	19 759 968	19 523 621	19 317 984
GDP PIB € m	123 134	136 479	142 245	160 353	187 940	223 337
GDP/PIB head/habitant €	5 737	6 391	7 133	8 115	9 626	11 561
Construction € m	19 877	22 034	31 461	30 014	24 414	40 354

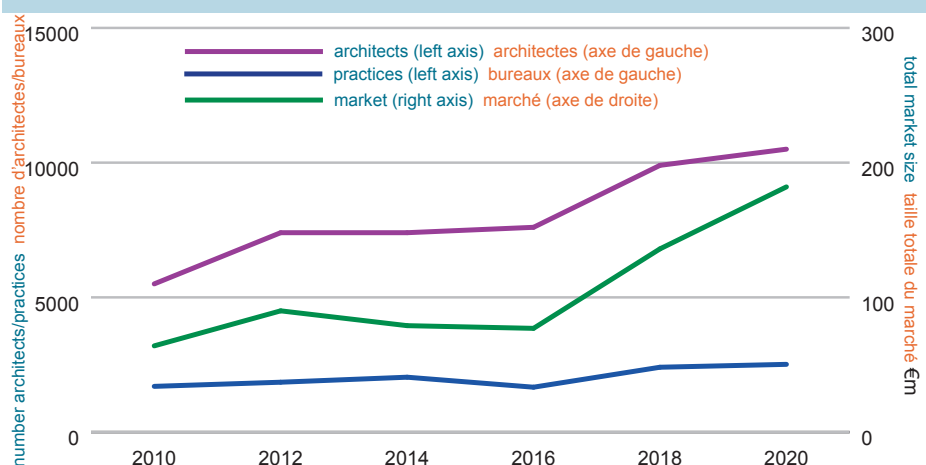
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	5 500	7 400	7 400	7 600	9 900	10 500
% Male Homme	53	56	55	77	55	56
% Female Femme	47	44	45	23	45	44
% <40 years <40 ans	48	47	42	33	61	59
Practices Bureaux	1 697	1 851	2 037	1 666	2 407	2 514

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	64	90	79	77	136	182
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	29 227	52 789	36 042	n/a	20 816	30 419
6 - 10 persons personnes	68 073	175 358	257 460	81 265	887 162	128 313

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	28	23	26	33	26	33
Partners & Directors Associé dirigeant	12	20	22	26	19	14
Private practice Salaried Salarié – Secteur privé	37	26	27	13	37	40
Private in-house L'industrie / commerce	2	1	1	0	1	0
Freelance Indépendant	10	3	1	0	10	4
Other Private Autres – Secteur privé	4	21	17	15	3	3
Local / central government Collectivité locale / gouvernement	2	1	2	8	1	2
Other Public Autre – secteur public	5	5	5	5	4	3

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	4 699	11 349	7 753	9 155	10 363	10 833
Partners & Directors Associé dirigeant	5 286	7 149	6 890	12 141	5 866	13 693
Private practice Salaried Salarié – Secteur privé	5 286	5 517	2 300	2 900	3 522	7 722
Private in-house L'industrie / commerce	3 552	6 755	n/a	n/a	n/a	n/a
Freelance Indépendant	5 874	4 053	n/a	n/a	6 203	4 200
Other Private Autres – Secteur privé	11 445	3 242	3 615	n/a	14 506	14 862
Local / central government Collectivité locale / gouvernement	3 524	1 430	n/a	n/a	n/a	2 400
Other Public Autre – secteur public	4 699	6 485	7 003	n/a	1 296	16 300

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	204	365	245	39	522	349
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 7	+/- 5.0	+/- 6.2	+/- 15.7	4.2	5.2

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

	2010	2012	2014	2016	2018	2020
Population	7 306 677	7 216 649	7 146 759	7 076 372	7 001 444	6 926 705
GDP PIB € m	31 546	35 432	36 427	35 740	36 795	45 970
GDP/PIB head/habitant €	4 317	4 910	5 097	4 733	5 255	6 637
Construction € m	4 471	5 526	4 357	1 945	6 727	10 438

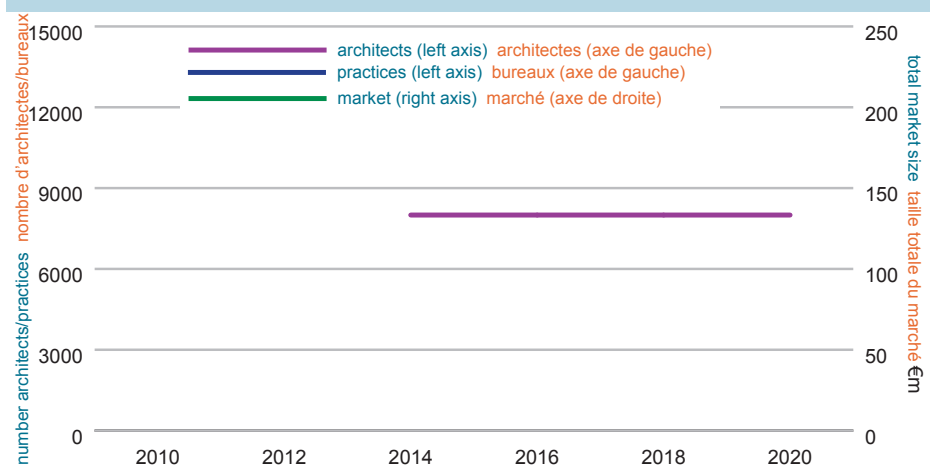
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	n/a	n/a	8 000	8 000	8 000	8 000
% Male Homme	n/a	n/a	n/a	n/a	n/a	33
% Female Femme	n/a	n/a	n/a	n/a	n/a	67
% <40 years <40 ans	n/a	n/a	n/a	n/a	n/a	50
Practices Bureaux	n/a	n/a	n/a	n/a	n/a	1 835

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	n/a	n/a	n/a	n/a	78
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	n/a	n/a	n/a	14 000
6 - 10 persons personnes	n/a	n/a	n/a	n/a	n/a	111 000

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	n/a	33
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a	7
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	n/a	40
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	0
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	0
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	0
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	13
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	7

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	n/a	n/a	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	n/a	n/a	7700
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	n/a	n/a	n/a	n/a	15
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	n/a	n/a	25.3



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

	2010	2012	2014	2016	2018	2020
Population	5 424 925	5 404 322	5 415 949	5 426 252	5 443 120	5 457 873
GDP PIB € m	65 592	71 730	72 134	78 686	84 851	93 865
GDP/PIB head/habitant €	12 091	13 273	13 319	14 501	15 589	17 198
Construction € m	13 335	12 761	12 343	12 418	15 430	15 263

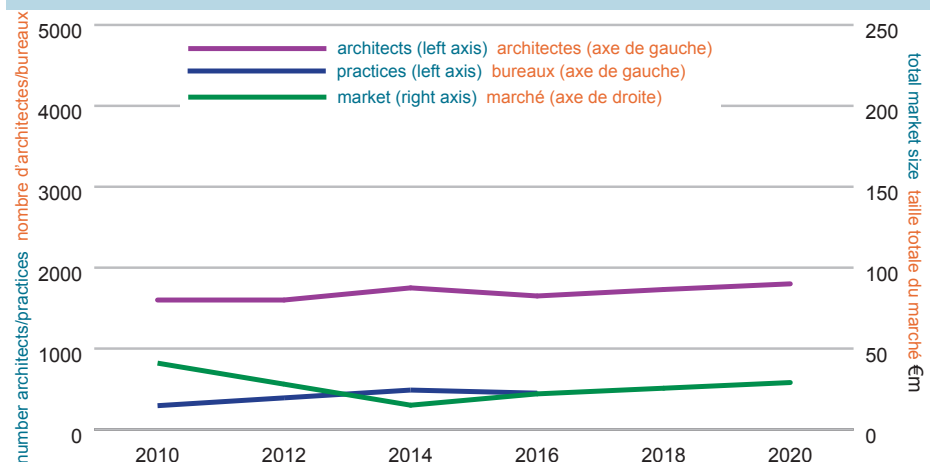
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	1 600	1 600	1 750	1 650	1 730	1 800
% Male Homme	85	n/a	79	77	n/a	80
% Female Femme	15	n/a	21	23	n/a	20
% <40 years <40 ans	27	n/a	28	33	n/a	19
Practices Bureaux	294	n/a	487	449	n/a	409

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	41	n/a	15	22	n/a	29
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	23 254	45 100	n/a	32 875
6 - 10 persons personnes	n/a	n/a	41 577	202 667	n/a	214 423

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	31	n/a	38	35	n/a	55
Partners & Directors Associé dirigeant	13	n/a	10	19	n/a	14
Private practice Salaried Salarié – Secteur privé	22	n/a	17	10	n/a	13
Private in-house L'industrie / commerce	0	n/a	0	1	n/a	1
Freelance Indépendant	22	n/a	26	24	n/a	11
Other Private Autres – Secteur privé	3	n/a	4	4	n/a	2
Local / central government Collectivité locale / gouvernement	3	n/a	3	5	n/a	2
Other Public Autre – secteur public	6	n/a	3	2	n/a	3

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	15 000	n/a	10 000	14 700	n/a	25000
Partners & Directors Associé dirigeant	38 000	n/a	11 500	10 800	n/a	34500
Private practice Salaried Salarié – Secteur privé	13 650	n/a	13 000	13 000	n/a	21000
Private in-house L'industrie / commerce	13 000	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	9 928	8 725	n/a	20000
Other Private Autres – Secteur privé	n/a	n/a	21 500	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	12 657	n/a	n/a	n/a
Other Public Autre – secteur public	16 378	n/a	10 000	n/a	n/a	12000

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	34	n/a	416	143	n/a	187
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-17	n/a	+/- 4.2	+/- 7.8	n/a	6.8

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

	2010	2012	2014	2016	2018	2020
Population	2 046 976	2 055 496	2 061 085	2 064 188	2 066 880	2 095 861
GDP PIB € m	35 800	36 172	35 275	38 570	43 000	48 393
GDP/PIB head/habitant €	17 489	17 598	17 115	18 685	20 804	23 090
Construction € m	6 585	4 864	5 522	4 339	7 309	7 404

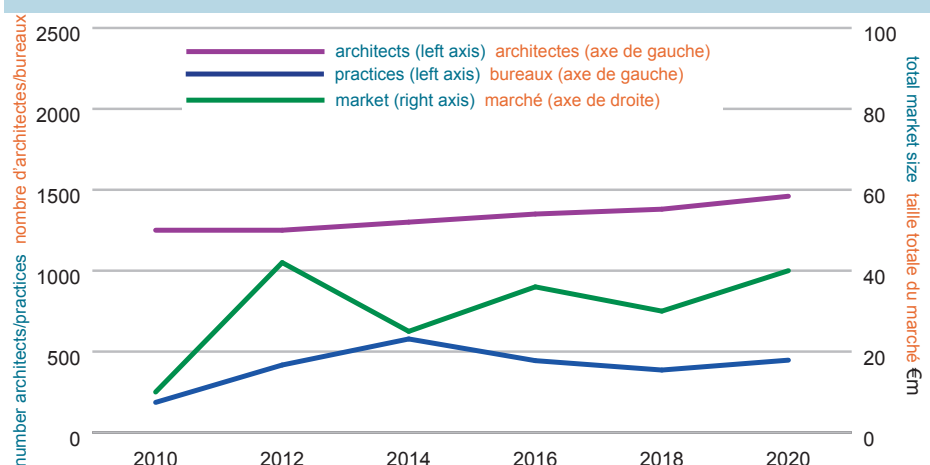
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	1 250	1 250	1 300	1 350	1 380	1 460
% Male Homme	50	57	44	48	52	46
% Female Femme	50	43	56	52	48	54
% <40 years <40 ans	43	33	33	24	43	29
Practices Bureaux	186	417	578	444	386	447

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	10	42	25	36	30	40
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	29 050	62 595	n/a	50 346
6 - 10 persons personnes	n/a	n/a	n/a	115 800	168 750	300 000

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	21	34	30	20	33	40
Partners & Directors Associé dirigeant	24	19	33	17	13	15
Private practice Salaried Salarié – Secteur privé	36	25	13	19	26	24
Private in-house L'industrie / commerce	0	0	0	4	4	6
Freelance Indépendant	10	13	20	19	20	2
Other Private Autres – Secteur privé	2	3	0	14	0	6
Local / central government Collectivité locale / gouvernement	5	3	3	6	4	6
Other Public Autre – secteur public	2	3	3	3	0	1

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	24 000	20 500	24 000	20 000	34 500	33 600
Partners & Directors Associé dirigeant	17 000	33 000	14 400	20 000	n/a	41 000
Private practice Salaried Salarié – Secteur privé	30 000	4 493	13 200	15 000	n/a	17 500
Private in-house L'industrie / commerce	7 550	7 750	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	22 000	20 000	12 830	21 000	n/a
Other Private Autres – Secteur privé	n/a	13 500	n/a	14 000	n/a	15 000
Local / central government Collectivité locale / gouvernement	n/a	1 200	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	25 000	15 000	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	43	37	53	111	46	89
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-15	+/-15.9	+/- 13.2	+/- 9.0	14.2	10.1

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

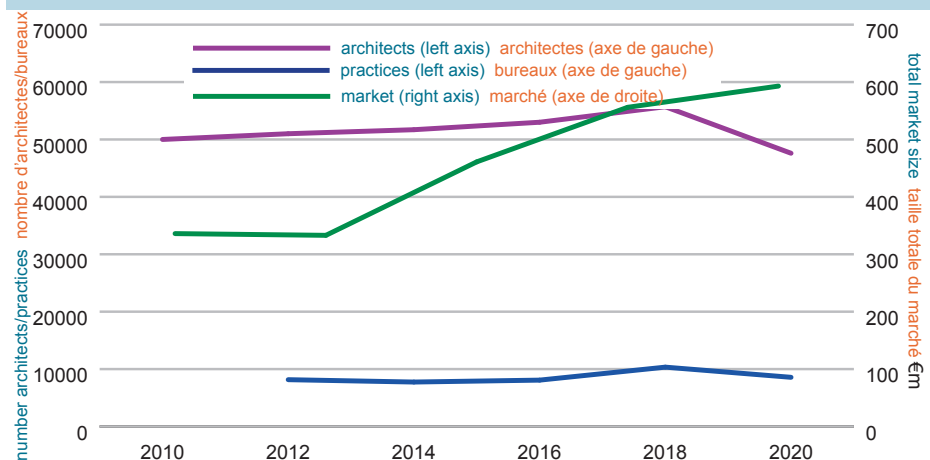
	2010	2012	2014	2016	2018	2020
Population	45 989 016	46 196 277	46 507 760	46 438 422	46 659 302	47 329 981
GDP PIB € m	1 048 883	1 063 355	1 022 988	1 075 639	1 166 319	1 244 772
GDP/PIB head/habitant €	22 807	23 018	21 996	23 163	24 996	26 300
Construction € m	191 820	156 525	162 642	131 177	146 327	162 643

Architectural Profession / **Profession d'architecte**

	2010	2012	2014	2016	2018	2020
Architects Architectes	50 000	51 000	51 700	53 800	55 700	47 600
% Male Homme	n/a	75	71	72	65	66
% Female Femme	n/a	25	29	28	35	34
% <40 years <40 ans	n/a	56	41	50	42	48
Practices Bureaux	n/a	8 153	7 742	8 077	10 337	8 567

Architectural Market / **Marché de l'architecture**

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	336	333	461	556	593
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	58 452	42 864	29 855	47 953	63 453
6 - 10 persons personnes	n/a	193 125	153 339	286 250	n/a	213 000

Trends 2010-20 / **Tendances 2010-20**

Field of Employment / **Domaine d'activité**

	per cent / pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	21	17	14	28	32
Partners & Directors Associé dirigeant	n/a	11	7	6	10	12
Private practice Salaried Salarié – Secteur privé	n/a	5	11	14	20	26
Private in-house L'industrie / commerce	n/a	0	0	0	1	1
Freelance Indépendant	n/a	14	12	13	22	12
Other Private Autres – Secteur privé	n/a	48	40	44	3	2
Local / central government Collectivité locale / gouvernement	n/a	1	7	6	7	7
Other Public Autre – secteur public	n/a	1	6	3	9	8

Earnings / **Revenus**

	Average earnings €* / Revenu moyen en €*					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	30 250	30 000	15 000	29 100	30 000
Partners & Directors Associé dirigeant	n/a	18 000	25 000	25 000	26 000	30 000
Private practice Salaried Salarié – Secteur privé	n/a	16 000	30 000	24 000	18 000	26 000
Private in-house L'industrie / commerce	n/a	15 000	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	26 400	20 000	21 000	20 000	22 500
Other Private Autres – Secteur privé	n/a	20 000	25 000	20 500	23 000	n/a
Local / central government Collectivité locale / gouvernement	n/a	4 200	40 304	52 000	39 000	41 500
Other Public Autre – secteur public	n/a	20 000	36 000	41 000	33 600	50 000

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

Response / **Réponse**

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	184	645	383	194	259
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/- 7.2	+/- 3.8	+/- 5.0	7.0	6.1



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

	2010	2012	2014	2016	2018	2020
Population	9 340 682	9 482 855	9 644 864	9 851 017	10 120 242	10 327 589
GDP PIB € m	339 215	387 886	420 849	446 946	475 231	474 194
GDP/PIB head/habitant €	36 316	40 904	43 635	45 371	46 958	45 915
Construction € m	38 269	38 608	43 152	63 559	57 032	63 948

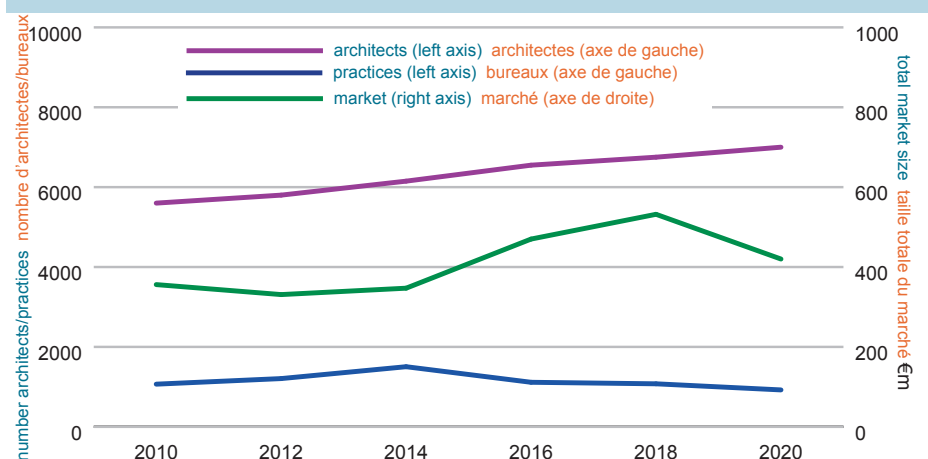
Architectural Profession / **Profession d'architecte**

	2010	2012	2014	2016	2018	2020
Architects Architectes	5 600	5 800	6 150	6 550	6 750	7 000
% Male Homme	51	49	49	54	42	41
% Female Femme	49	51	51	46	58	58
% <40 years <40 ans	31	32	34	25	38	34
Practices Bureaux	1 067	1 207	1 504	1 114	1 076	923

Architectural Market / **Marché de l'architecture**

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	356	331	347	470	532	420
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	170 469	196 857	333 424	204 343	156 525	66 180
6 - 10 persons personnes	640 615	700 687	670 488	908 062	630 058	801 321

Trends 2010-20 / **Tendances 2010-20**



Field of Employment / **Domaine d'activité**

	per cent / pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	9	12	29	14	8	13
Partners & Directors Associé dirigeant	14	6	17	7	7	8
Private practice Salaried Salarié – Secteur privé	42	39	32	40	58	60
Private in-house L'industrie / commerce	2	1	1	0	0	0
Freelance Indépendant	3	0	1	0	0	1
Other Private Autres – Secteur privé	3	16	4	11	1	1
Local / central government Collectivité locale / gouvernement	20	23	14	24	22	17
Other Public Autre – secteur public	7	3	2	3	4	1

Earnings / **Revenus**

	Average earnings €* / Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	38 659	51 710	54 903	53 255	30 167	46 194
Partners & Directors Associé dirigeant	53 693	59 620	69 323	76 079	56 564	68 159
Private practice Salaried Salarié – Secteur privé	38 562	44 974	45 254	48 908	40 726	43 554
Private in-house L'industrie / commerce	35 437	73 119	n/a	n/a	n/a	n/a
Freelance Indépendant	37 220	44 884	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	38 122	44 783	55 835	46 952	n/a	38 558
Local / central government Collectivité locale / gouvernement	46 412	49 496	61 048	50 321	44 120	50 342
Other Public Autre – secteur public	39 174	45 559	55 458	56 342	40 792	57 695

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

Response / **Réponse**

	2010	2012	2014	2016	2018	2020
Participants Répondants	1 200	1 523	853	661	491	566
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/- 3	+/- 2.2	+/- 3.1	+/- 3.6	4.3	3.9

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	7 785 806	7 954 662	8 136 689	8 325 194	8 482 152	8 606 033
GDP PIB € m	367 134	474 689	489 673	604 510	601 327	628 107
GDP/PIB head/habitant €	47 154	59 674	60 181	72 612	70 893	72 984
Construction € m	46 326	n/a	47 311	70 218	75 721	68 569

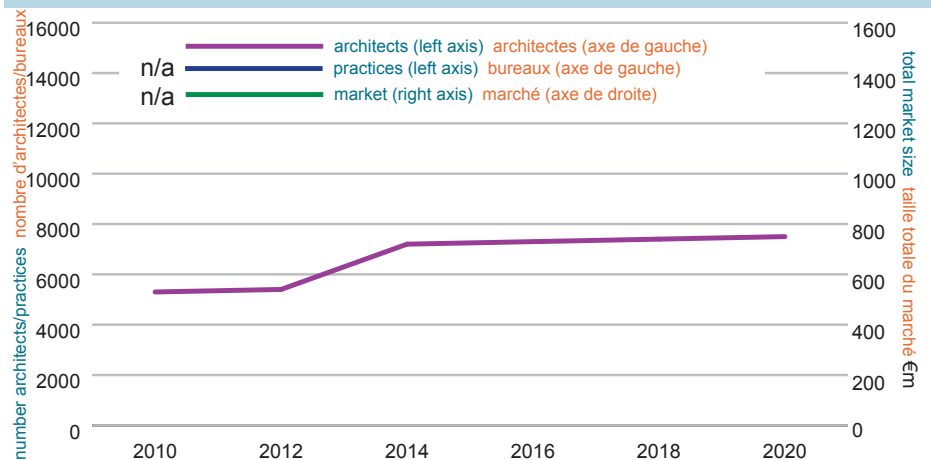
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	5 300	5 400	7 200	7 300	7 400	7 500
% Male Homme	n/a	n/a	73	n/a	n/a	n/a
% Female Femme	n/a	n/a	28	n/a	n/a	n/a
% <40 years <40 ans	n/a	n/a	33	n/a	n/a	n/a
Practices Bureaux	n/a	n/a	1 629	n/a	n/a	n/a

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	n/a	n/a	624	n/a	n/a	n/a
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	n/a	187 577	n/a	n/a	n/a
6 - 10 persons personnes	n/a	n/a	962 959	n/a	n/a	n/a

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2020	2020
Sole Principals Dirigeant unique	n/a	n/a	22	n/a	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	37	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	21	n/a	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	1	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	3	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	11	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	5	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	2	n/a	n/a	n/a

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	n/a	n/a	90 175	n/a	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	98 373	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	n/a	69 271	n/a	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	59 024	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	90 175	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	111 489	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	n/a	n/a	n/a	n/a	n/a

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	n/a	n/a	200	n/a	n/a	n/a
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	+/- 6.8	n/a	n/a	n/a

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2010	2012	2014	2016	2018	2020
Population	62 008 048	62 989 550	64 308 261	65 341 183	66 238 007	67 025 542
GDP PIB € m	1 692 703	1 746 962	1 899 098	2 577 280	2 332 087	2 522 713
GDP/PIB head/habitant €	27 298	27 734	29 531	39 443	35 208	37 638
Construction € m	251 329	243 857	225 064	305 069	367 926	356 761

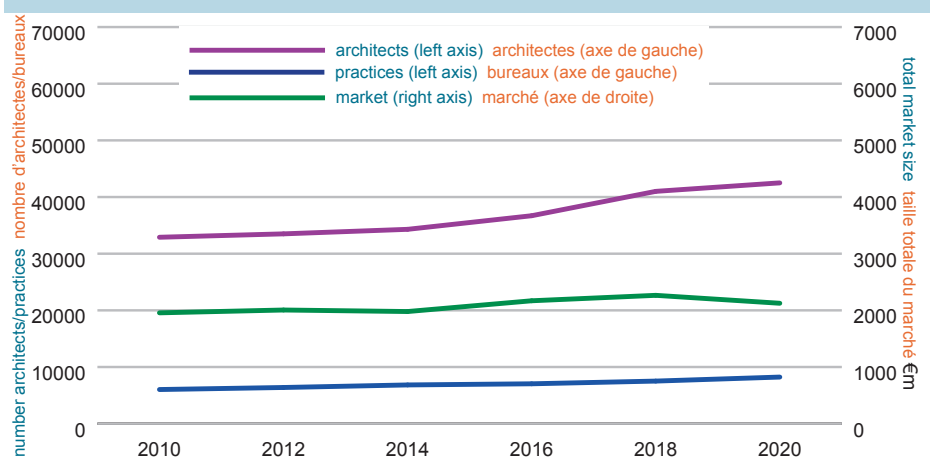
Architectural Profession Profession d'architecte

	2010	2012	2014	2016	2018	2020
Architects Architectes	32 900	33 500	34 300	36 700	41 000	42 500
% Male Homme	70	80	75	67	74	67
% Female Femme	30	20	25	33	26	32
% <40 years <40 ans	35	30	33	37	31	27
Practices Bureaux	6 024	6 385	6 835	7 037	7 515	8 224

Architectural Market Marché de l'architecture

	2010	2012	2014	2016	2018	2020
Market Marché (€ m)	1 956	2 006	1 979	2 169	2 265	2 125
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	n/a	120 700	105 975	110 601	108 955	66 180
6 - 10 persons personnes	542 955	760 354	823 860	657 411	464 416	801 321

Trends 2010-20 Tendances 2010-20



Field of Employment Domaine d'activité

	per cent pourcentage					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	23	16	14	18	20	25
Partners & Directors Associé dirigeant	16	27	24	17	19	18
Private practice Salaried Salarié – Secteur privé	43	40	51	47	45	40
Private in-house L'industrie / commerce	1	2	1	2	1	1
Freelance Indépendant	2	1	1	3	2	2
Other Private Autres – Secteur privé	3	6	4	5	5	6
Local / central government Collectivité locale / gouvernement	7	5	2	4	3	4
Other Public Autre – secteur public	4	4	5	5	5	4

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2010	2012	2014	2016	2018	2020
Sole Principals Dirigeant unique	12 076	41 338	36 562	35 726	39 704	43 674
Partners & Directors Associé dirigeant	48 306	61 327	60 936	63 796	52 182	56 720
Private practice Salaried Salarié – Secteur privé	42 569	45 382	43 874	50 000	45 376	44 241
Private in-house L'industrie / commerce	43 475	49 062	n/a	53 589	79 691	n/a
Freelance Indépendant	n/a	63 780	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	46 675	51 021	76 780	47 209	70 333	70 900
Local / central government Collectivité locale / gouvernement	56 759	47 966	51 187	50 603	56 720	56 720
Other Public Autre – secteur public	42 569	49 062	54 843	70 000	58 989	56 720

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

Response Réponse

	2010	2012	2014	2016	2018	2020
Participants Répondants	100	1 828	466	1 074	707	423
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-10	+/- 2.2	+/- 4.5	+/- 2.9	3.7	4.7

Appendix

A1 SURVEY METHODOLOGY

The 2020 Sector Study was commissioned by the Architects' Council of Europe (ACE) the representative body for the architectural profession at European level whose Members are the national representative and registration bodies of the profession in all EU Member States, Accession States, Norway and Switzerland. It repeats and updates the previous biennial Sector Studies the first of which was in 2008. All 31 countries from which the ACE drew its membership at the time of the Study in 2020 were invited to participate and 26 countries took part.

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

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

TABLE A-1
ON-LINE SURVEY RESPONSE

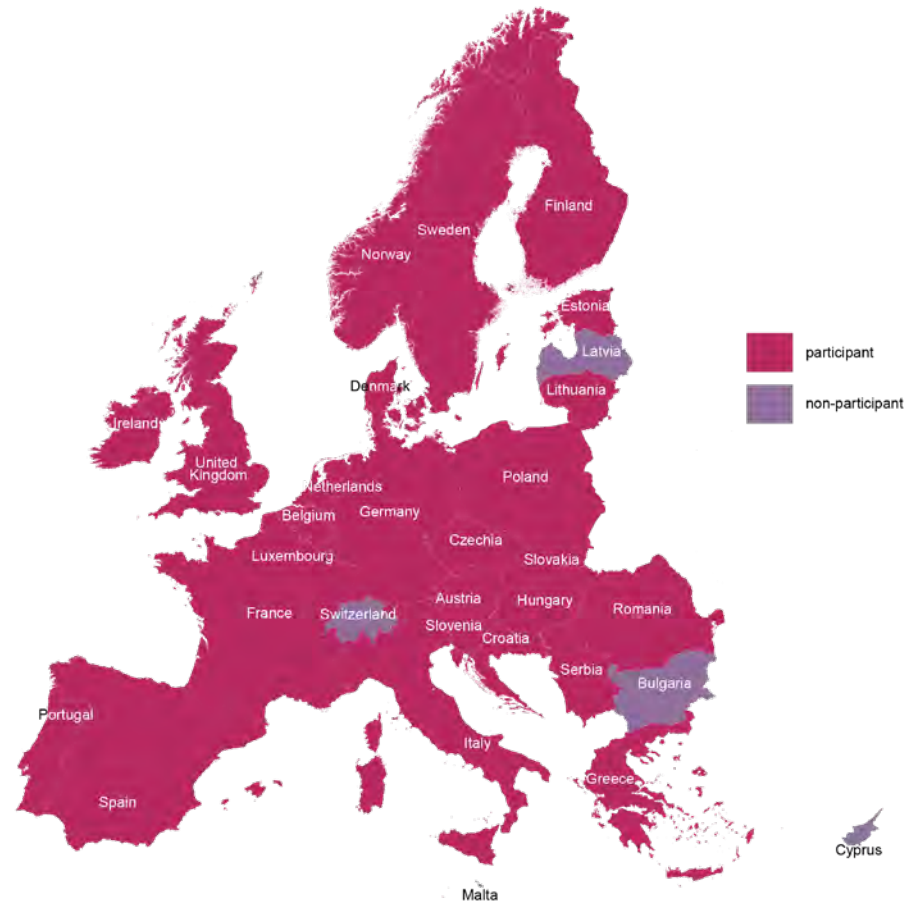
	respondents to Architects' survey	respondents to Principals' survey	total number of replies
Austria	6	192	198
Belgium	53	76	129
Croatia	129	40	169
Czechia	110	103	213
Denmark	135	21	156
Estonia	6	5	11
Finland	162	57	219
France	233	517	750
Germany	9316	4748	14064
Greece	148	46	194
Hungary	25	22	47
Ireland	242	161	403
Italy	3282	1939	5221
Lithuania	8	9	17
Luxembourg	4	76	80
Netherlands	19	30	49
Norway	122	47	169
Poland*	48	37	85
Portugal	1040	492	1532
Romania	168	181	349
Serbia	12	3	15
Slovakia	43	144	187
Slovenia	30	59	89
Spain	140	119	259
Sweden	426	140	566
United Kingdom	225	198	423
2020 EUROPE-26	16141	9465	25606

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

The Sector Study was aimed at 31 countries:

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

CHART A-1
COUNTRIES PARTICIPATING IN THE 2020 SURVEY



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

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

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

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

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

The survey methodology was as follows:

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

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

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

Responses to the survey were received electronically. 11 500 architects replied directly to the ACE questionnaire, and a further 14 000 architects responded to the same questions included in the BAK survey.

The response is considered satisfactory for the level of analysis undertaken. The statistical validity of these results is accurate to within + / - 0.5 per cent at the 95 per cent confidence level. The accuracy varies for each individual country and these + / - 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	6.8
Belgium	8.6
Croatia	7.3
Czechia	6.5
Denmark	7.8
Estonia	29.4
Finland	6.4
France	3.5
Germany	0.8
Greece	7.0
Hungary	14.2
Ireland	4.6
Italy	1.3
Lithuania	23.6
Luxembourg	10.6
Netherlands	14.0
Norway	7.4
Poland	10.6
Portugal	2.4
Romania	5.2
Serbia	25.3
Slovakia	6.8
Slovenia	10.1
Spain	6.1
Sweden	3.9
United Kingdom	4.7
2020 EUROPE-26	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 METHODOLOGICAL NOTES

1. Method for weighting the 'All' figure

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

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

2. Cautionary note: employment status

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

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

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

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

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

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

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

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

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

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

5. Minimum cell sizes

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

