



# The Architectural Profession in Europe

The Architects' Council of Europe (ACE) commissioned a Sector Study in two phases in collaboration with its member sections. The Study was aimed at 32 countries (E32). Just over 8,000 participants sent in their responses from a total of 17 countries (E17), with 24% of Maltese periti responding to the call made by the Kamra tal-Periti to send in their feedback.

## DEMOGRAPHY

E32 has an estimated 483,000 architects. 25% of these are based in just one country; Italy. The second highest number of architects is recorded in Germany, accounting for 20% of the Europe total. Third highest is Spain, with 45,000 architects and three countries (Turkey, UK and France) have around 30,000 architects each (between 6 and 7% of the Europe total). Thus these six countries together account for 74% of all of Europe's architects.

Comparing the number of architects with the general population is another way of examining country variations. There are approximately 0.8 architects per 1000 of Europe's population. The highest 'density' of architects occurs in Italy (2.1 architects per 1000 population), FYROM and Portugal. The lowest 'density' of architects is recorded in Eastern Europe – Slovakia, Latvia, Czech Republic and Romania, each recording 0.3 or fewer architects per 1000 population. The range in the 'density' sta-

tistic across Europe is huge; in Italy there is one architect for every 485 people while in Slovakia the ratios nearly ten times lower at one architect for every 4155 people. In Malta, there are 1.2 architects per 1000 population.

The vast majority of architects (93%) work or reside in the same country as they are registered in. The highest proportions of architects working / resident outside their 'home' country are in Ireland (18%), Malta (14%), Austria (13%) and Luxembourg (11%).

The male / female split across Europe averages at around one third female, two thirds male. In five countries the profession is predominantly male; 80% or more of architects in Austria, Estonia, Malta and the Netherlands are male. However, in four countries women form the majority of the profession, namely Finland, France, Greece and Sweden.

The age profile of the profession is skewed towards younger age groups with 42% aged under 40. The profession peaks at a relatively young age, in the age range between 35 and 39, after which numbers decline. 23% of the profession is aged under 35, with slightly more (32%) aged between 35 and 44. Thus, a little over half of the profession is aged under 45. Countries with the youngest profile are Turkey (48% aged under 35), Belgium (41%) and Malta (46%). Countries with the highest proportion of architects aged over 55 are Denmark

(26%), Finland (29%), the Netherlands (28%) and Sweden (30%). Fewer than 10% of architects are aged 60 or over.

A significant proportion of architects operate alone as Sole Principals (24%) and Freelancers (9%) which is typical of the 'liberal professions'. Including Sole Principals, private practice dominates and accounts for more than two thirds of the profession. 27% of architects work in private practice as salaried architects (including Associates), while the remainder are Principals, Partners or Directors, with an equity stake in the practice.

Outside private practice, the principal employer is Government and Local Authorities. The public sector employs 13% of the profession. Private practice is the largest employment field in most countries. The highest level of architects employed in private practices is in Austria (99%). The highest proportion of architects who are Sole Principals is in Austria (66%) and Germany (40%) while the lowest proportions are in Malta (9%), Sweden (8%) and the UK (8%).

## MARKET

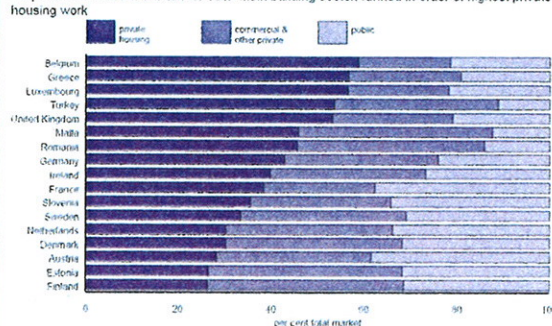
The total value of the E32 construction market is estimated to be worth in excess of €1,650 billion per year. This includes civil engineering and infrastructure work. There are four significant players, who together account for 54% of total construction output: the UK, France, Germany and Italy. Construction output has been growing in

each of the last ten years. The estimated figure for 2007 is an all-time peak value, up by 4 per cent since the previous year. Construction output measured per head of the general population works out at €2,826 per person. The highest output per head is in Luxembourg, Norway and Ireland - each is over €7,000 per person.

The total value of the architectural market in the 17 surveyed countries is estimated to be €11.6 billion. This relates to the total value of the revenue generated by the profession. This figure is very much of an estimate and relies on survey data from which it has been grossed up. Two countries emerge as having the largest markets: Germany and the UK. Those two countries alone account for more than half of the total market of the countries surveyed. Analysed per architect, the highest values are recorded by architects in Ireland, the Netherlands and the UK. The average market size per architect in these three countries is €95,000 or more. By comparison, the average market size per architect is under €25,000 in Finland, Greece, Romania and Turkey.

The largest single sector of the market is work to individual houses. These account for an estimated 31% of the architectural market. Other private housing work - which will include flats and housing developments - account for a further 14%. So in total 45% of the architects' market is private housing. Add in the public housing share and housing in total accounts for 49%. 18% of the market is commercial work, while public works (including public housing) accounts for 24%. Over half of work in Belgium, Greece, Luxembourg, the UK and Turkey is private housing (including individual houses). The highest proportion of public sector work is in Austria and France. Commercial and other private is highest in Malta, Romania, Estonia and Finland. Not only is private housing the dominant source of revenue; more architectural practices are involved in private housing than in any other sector. 76% of architectural practices have, in the past 12 months, derived revenue from work on individual houses; while 48% have undertaken other private housing work. 42% have been involved in the office sector.

Proportion of work undertaken for each main building sector, ranked in order of highest private housing work



## Summary

Countries in Sector Study	32 (E32)
Participating countries	17 (E17)
Total respondents	8,083
Response rate	18%
Estimated no. of architects in E32	483,000
Estimated no. of architects in E17	255,850
Estimated size of construction industry in E32	€1,650 billion
Estimated size of architectural market in E32	€22 billion
Women architects	37%
Economically active (full or part-time)	84%
Freelance architects	9%
Sole Principals	24%
Architects aged under 40	42%
Architects aged 40 to 54	40%
Architects aged 55 and over	18%

The data presented in this article was sourced from The Architectural Profession in Europe - A Sector Study Commissioned by the Architects' Council of Europe, carried out by Mirza & Nacey Research. More results will be published in the next issue of 'The Architect'.