

The Architectural Profession in Europe 2014

A Sector Study





The Architectural Profession in Europe 2014

Contents

I	Foreword	2	3.6 Profits	40	FINAL
	Introduction and Summary	3	3.7 Revenue from outside country	41	
	Key statistics	4	3.8 Associations	42	© Mirza & Nacey Research Ltd
1	1: ARCHITECTS IN EUROPE		3.9 Branch offices	43	Research undertaken by:
	1.1 Numbers	9	3.10 Competitive tenders	44	Mirza & Nacey Research Ltd
	1.2 Profile	11	3.11 Certification work	46	Southdown House
	1.3 Employment status	12			Ford, Arundel
	1.4 Field of employment	13	4	4: ARCHITECTS – THE INDIVIDUAL	West Sussex
	1.5 Years qualified	15	4.1 Earnings	48	BN18 0DE
	1.6 Age Profile	16	4.2 Earnings by field of employment	50	United Kingdom
2	2: ARCHITECTURE – THE MARKET		4.3 Earnings by age	51	Tel: +44 1243 555302
	2.1 Construction market	19	4.4 Earnings by gender	52	www.mirza-nacey.com
	2.2 Architectural market	23	4.5 Working in another		Research Commissioned by:
	2.3 Market by building	25	European country	53	The Architects' Council of Europe
	2.4 Market by client type	27	4.6 Main concerns about working		29 Rue Paul Emile Janson
	2.5 Market by service	28	in another country	55	B-1050 Brussels
	2.6 Future prospects	29	4.7 Retirement	56	www.ace-cae.eu
3	3: ARCHITECTURE – THE PRACTICE		4.8 Hours worked	58	
	3.1 Profile	31	4.9 Career satisfaction	59	
	3.2 Legal formation	34	4.10 CPD	64	
	3.3 Practice revenue	36	4.11 Building to nearly zero		
	3.4 How practices charge	37	energy standards	66	
	3.5 Hourly rates	38			
			II	COUNTRY PROFILES	69
				APPENDIX	
				Survey methodology & Notes	99

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 Project: Centar Zamet
 Photo: Domagoj Blažević
 Place: Rijeka – Croatia

Based on responses from 18.000 Architects in 26 European countries, this fourth edition of the Sector Study commissioned by the Architects' Council of Europe has been complemented with new data on cross-border training and working, making it **the most comprehensive and significant report on the state of the architectural profession in Europe.**

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

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

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

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



Luciano Lazzari
ACE President

Introduction and Summary

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

The research confirms that architecture is a **growing** profession in Europe: the number of architects in Europe has increased by 6 per cent since 2012. Growth is being pushed by southern European countries. It is becoming a **more equal** profession: women now account for 39 per cent of architects, the highest proportion recorded.

There are, however, fewer young women (under 40) than in previous surveys, maybe as a consequence of the continuing economic crisis. But more positively, this year's survey shows the rate of reported unemployment has edged lower from the 2012 peak; there are also more architects working full-time in Europe this year than in 2012. Unemployment has fallen even in those countries where it was significant in 2012, although it remains a serious issue for a substantial minority of architects in several southern European countries.

In previous surveys we have seen how the profession has responded to the impact of

the economic crisis. Architecture is a **flexible** profession which allows architects to establish alone if they are made redundant from larger practices, or if they cannot get a job. This year's survey shows that the number of single person practices has increased since the 2012 survey by an estimated 22 per cent; the number of practices of all other sizes has fallen.

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

All this against an economic background which continues to be frustratingly difficult. The demand for architectural services remains muted, with construction output continuing to fall in several key countries. The latest available statistics show that most of the Eurozone is recording no change, or a decline, in construction output - while most of the growth is limited to countries which are located in the periphery of Europe. Overall, construction output has been flat for the past five years. Our estimate shows the size of the architectural market has fallen by 5 per cent since 2012. Architects are getting a declining share of a stagnant market - the architectural market as a share of construction output has fallen, from 1.1 per cent in the 2008 and 2010

surveys, to 0.9 per cent now. Architectural practices' client base remains strongly reliant upon private housing, and in particular individual housing. This year there is less commercial work than in 2012, but more public work.

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

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



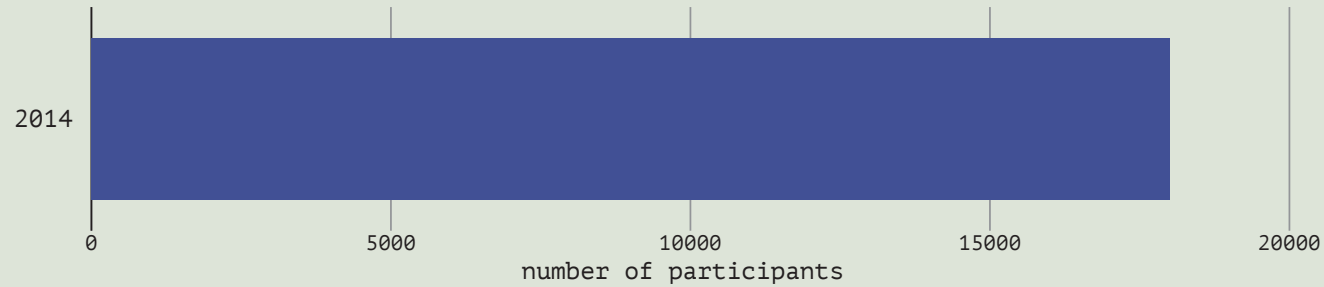
MIRZA & NACEY RESEARCH

Survey Participation - 2014

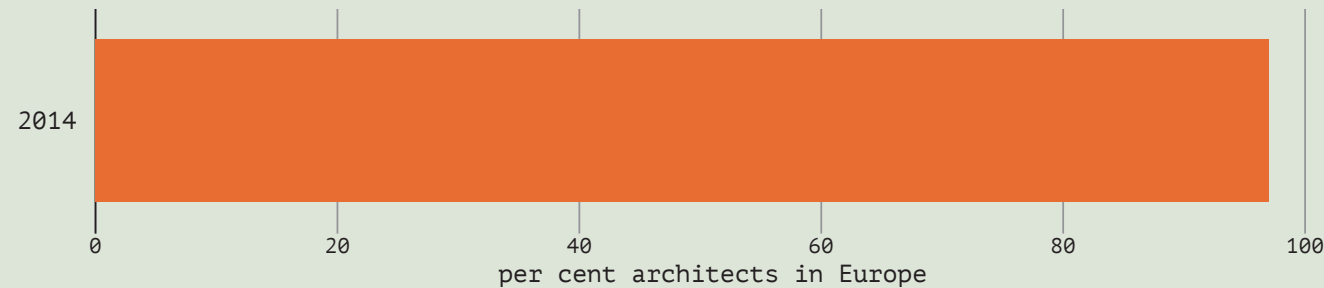
26
member
organisations



18000
participants

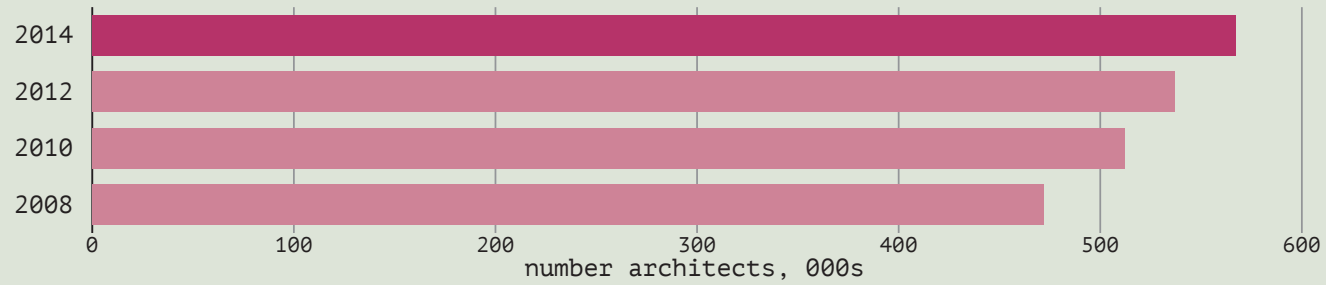


survey
covers
97% of
profession

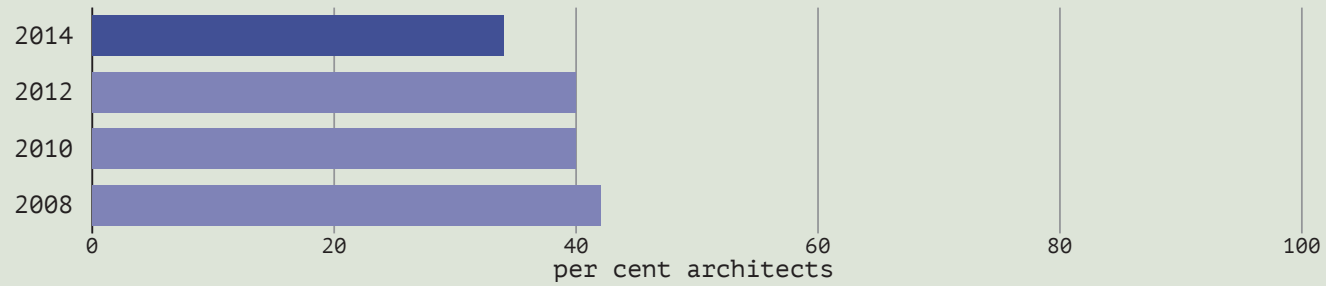


Demography of the Profession

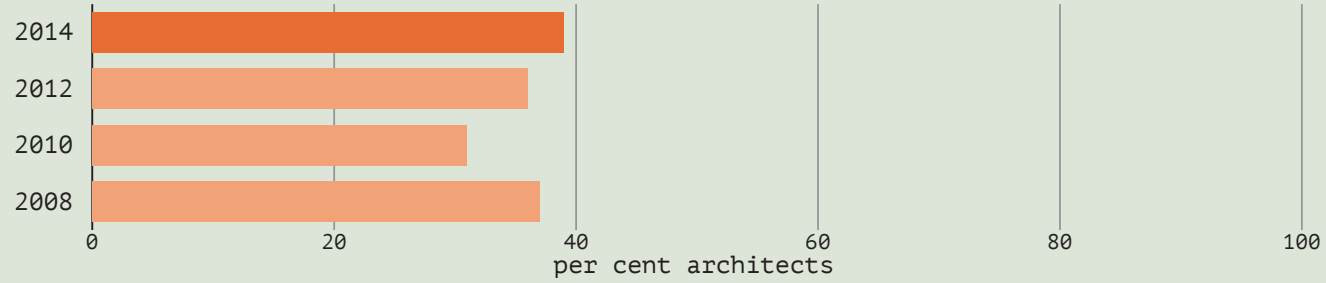
565000
architects
in Europe



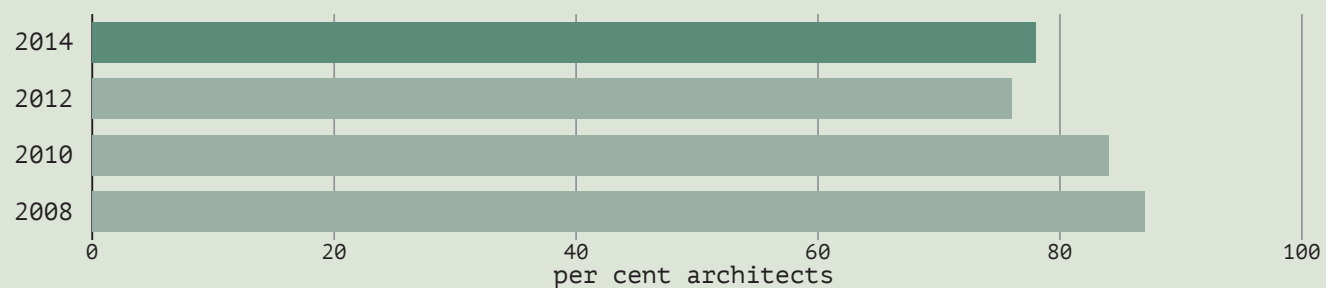
34%
aged under 40



39%
women

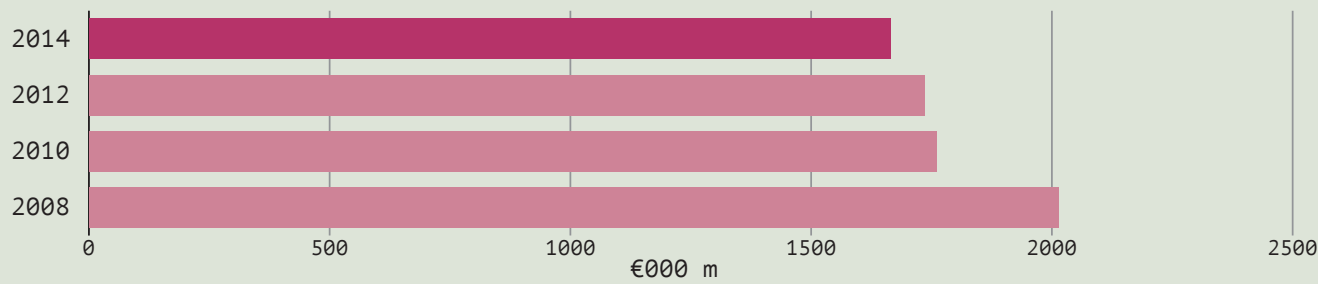


78%
working
full-time

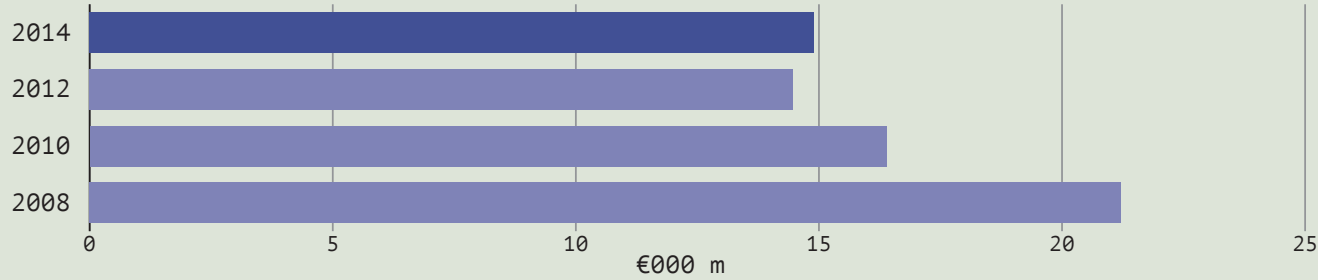


The Market

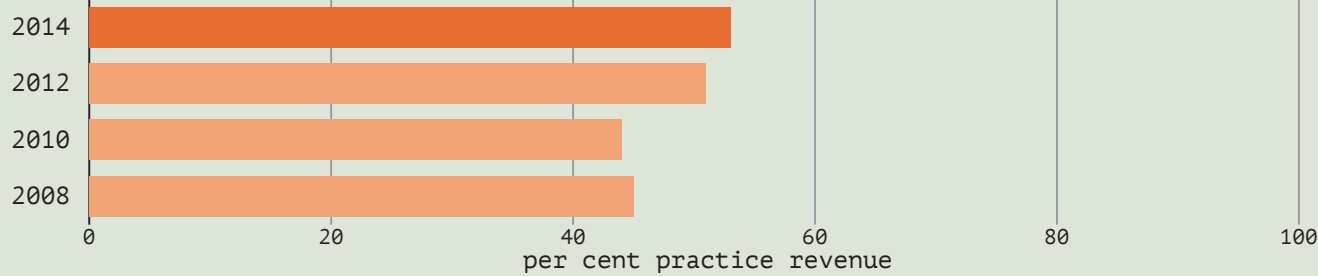
€1664 bn
construction
output



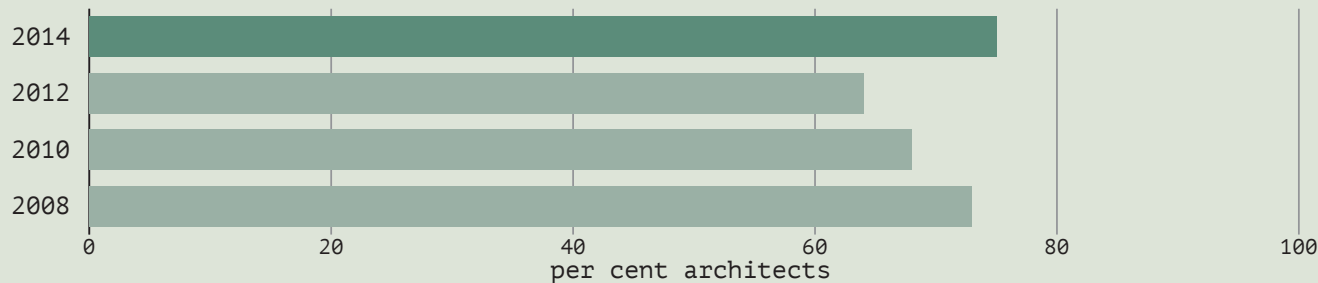
€14.9 bn
architectural
market



53%
architects'
work is
private
housing

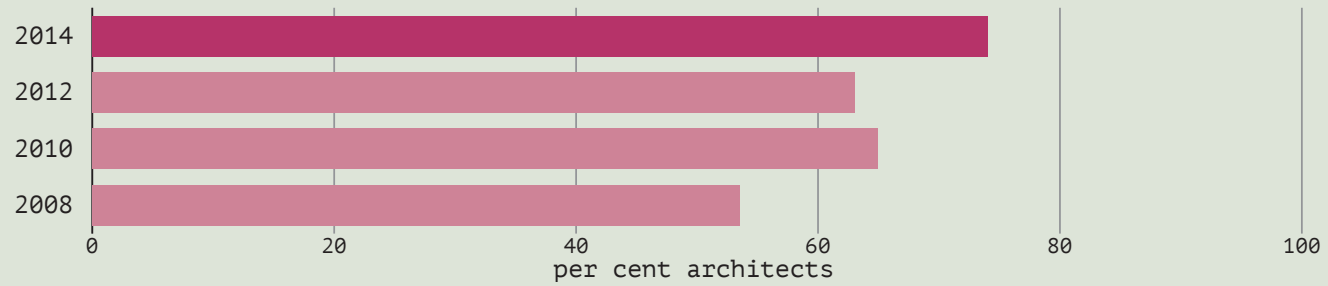


75%
expect rise
or no change
in workloads
next year

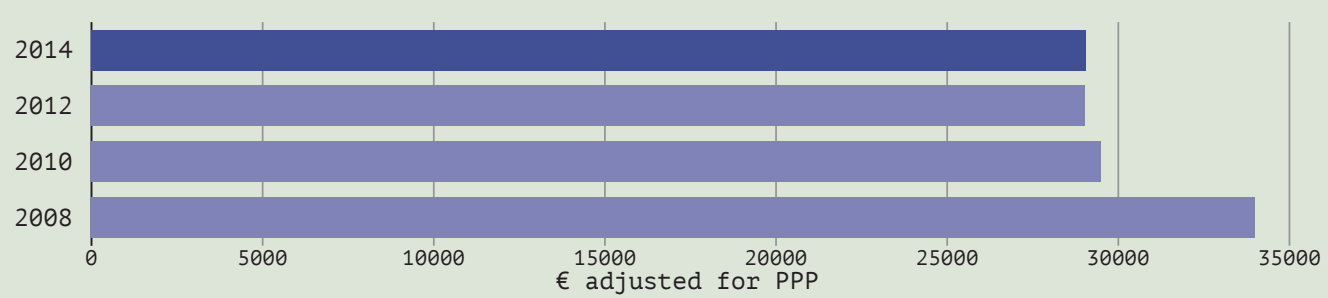


Practice, Income, Satisfaction

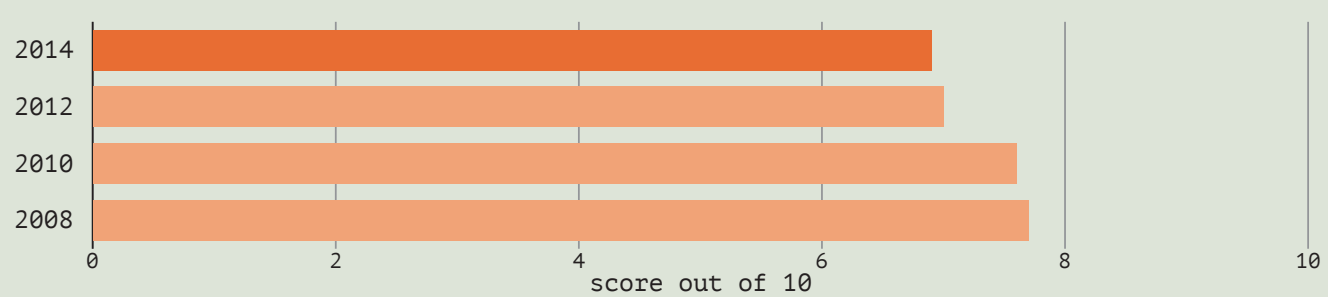
74%
of practices
are one
person
practices



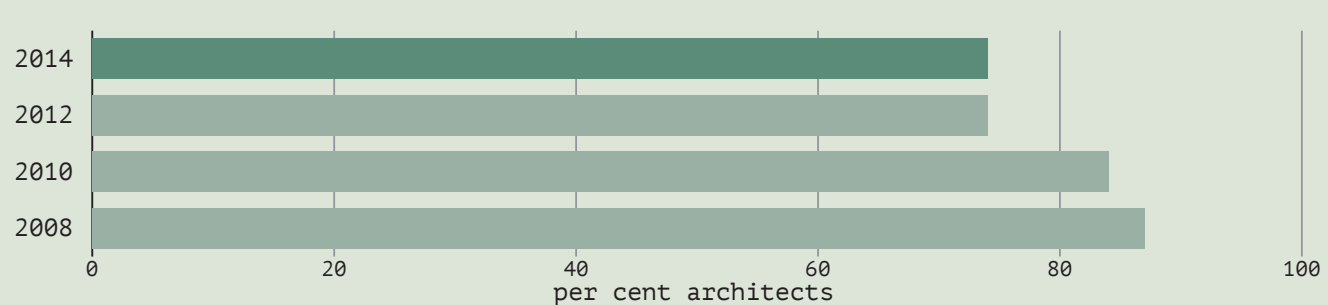
€29070
average
earnings
(PPP)



6.9/10
satisfaction
rating -
choice of
career



74%
will work as
an architect
until retired



1 Architects in Europe



Architect: Versas Architects
Project: Saunalahti comprehensive schools
Photographer: Andreas Meichsner
Place: Saunalahti - Finland

1.1 The number of Architects in Europe

EUROPE-31 has an estimated 565 000 architects. A significant proportion (27 per cent) of this number are from just one country, Italy (153 000 architects) while Germany accounts for 19 per cent of Europe's architects (107 200). Other countries with high numbers of architects are Spain (51 700), Turkey (44 700), the United Kingdom (34 300) and France (29 800). Analysed as a proportion of the population, the highest 'density' of architects - measured as the number of architects per 1 000 population - are in Italy (2.5 architects per 1 000 population), and Portugal (2.0 architects per 1 000 population). The overall density of architects across Europe is 1.0 architects per 1 000 population.

The estimated number of architects continues to climb. It is higher than previous estimates, although this year's base comprises slightly different countries from previous years. If we make a direct comparison with this year's EUROPE-31, the estimated number of architects has increased by 6 per cent between 2012 and 2014. This is similar to the 5 per cent rise recorded during 2010 to 2012, and the 8 per cent rise between 2008 and 2010 (although for some countries the 2008 estimates were significantly revised which accounts for some of that rise).

The 6 per cent rise in the number of architects in Europe since 2012 compares with a fall of 2 per cent in the general population. Part of the rise in early survey years was due to continued refining of the figures, but the latest rise is probably explained by increasing numbers of young architects entering the profession - while at the same time fewer older architects retire.

Three countries (where data for both years is based on identical source) record rises of over 10 per cent - Turkey, Luxembourg and Portugal.

CHART 1-2
Number of architects per 1000 population

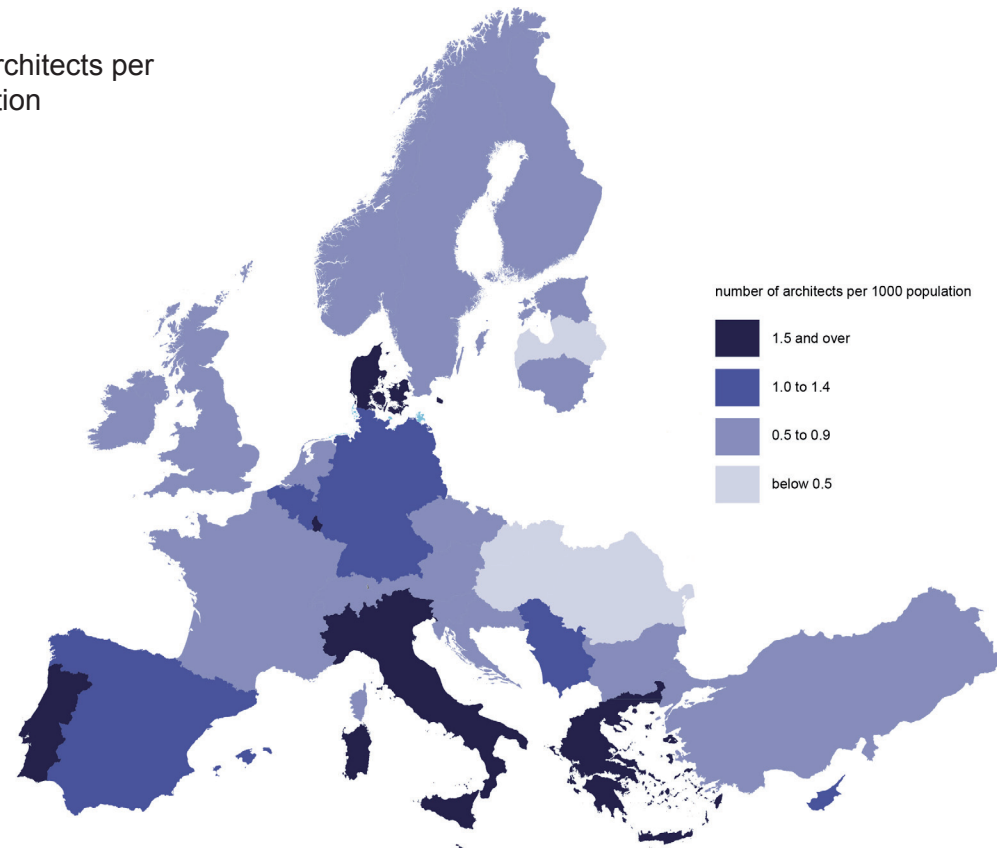


CHART 1-1
Estimated number of architects 2014

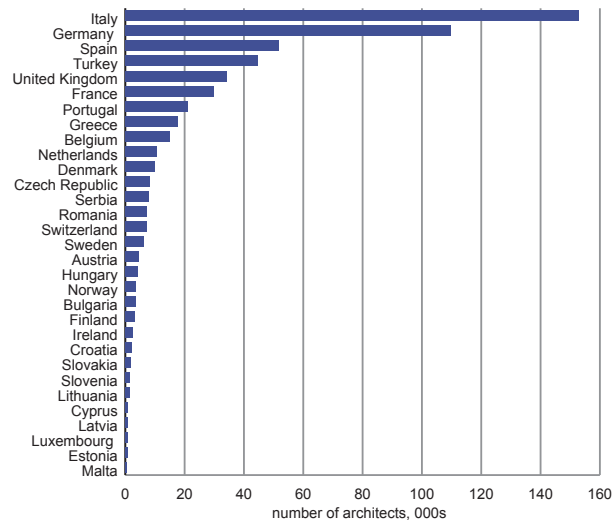


TABLE 1-1

Estimated number of architects in each country and number of architects per 1000 population

	number of architects	population	architects per 1000 population
Austria	4 650	8 507 786	0.5
Belgium	15 000	11 203 992	1.3
Bulgaria	3 400	7 245 677	0.5
Croatia	2 200	4 246 700	0.5
Cyprus	950	858 000	1.1
Czech Republic	8 200	10 512 419	0.8
Denmark	10 000	5 627 235	1.8
Estonia	800	1 315 819	0.6
Finland	3 300	5 451 270	0.6
France	29 800	65 856 609	0.5
Germany	107 200	80 780 000	1.3
Greece	17 600	10 992 589	1.6
Hungary	4 100	9 879 000	0.4
Ireland	2 600	4 604 029	0.6
Italy	153 000	60 782 668	2.5
Latvia	900	2 001 468	0.4
Lithuania	1 350	2 943 472	0.5
Luxembourg	900	549 680	1.6
Malta	650	425 384	1.5
Netherlands	10 900	16 829 289	0.6
Norway	3 650	5 109 056	0.7
Portugal	21 200	10 427 301	2.0
Romania	7 400	19 942 642	0.4
Serbia	8 000	7 146 759	1.1
Slovakia	1 750	5 415 949	0.3
Slovenia	1 450	2 061 085	0.7
Spain	51 700	46 507 760	1.1
Sweden	6 150	9 644 864	0.6
Switzerland	7 200	8 136 689	0.9
Turkey	44 700	77 667 864	0.6
United Kingdom	34 300	64 308 261	0.5
EUROPE - 31 - 2014	565 000	565 981 316	1.0
EUROPE - 33 - 2012	548 530	601 451 878	0.9
EUROPE - 33 - 2010	523 700	595 082 893	0.9
EUROPE - 33 - 2008	483 480	586 877 058	0.8

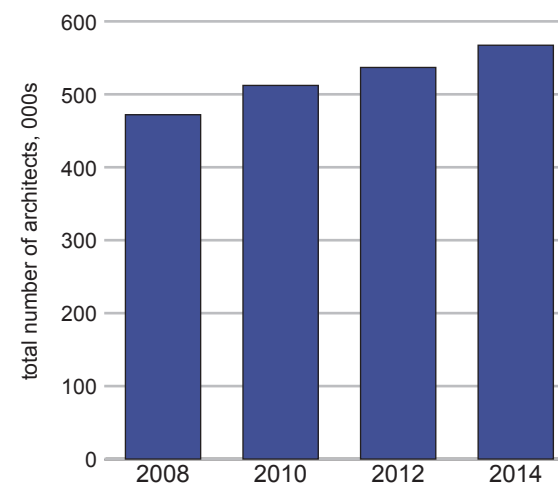
Population source: Eurostat, population as at 1 January 2014, copyright (c) Eurostat

Architects source: Various sources. The starting point was data compiled for the 2008 Sector Study which itself was based on the research publication produced by COAC - *Architectural Practice Around the World* research by the Col-legi d'Arquitectes de Catalunya (COAC), based on information supplied by national institutes and associations of architects of the individual countries. For the 2008 ACE report this data from COAC was updated using a mixture of primary and secondary research.

To update the figures in 2010, 2012 and 2014, we used a mixture of primary and secondary sources including Member Organisations' websites and email contact with Member Organisations. Final figures are Mirza & Nacey best estimates based on these several different sources. All figures are 'latest available'. 2008 figures were revised in 2010, which accounts for some of the increase between those two years.

CHART 1-3

Change in estimated number of architects in EUROPE-31, 2008-14



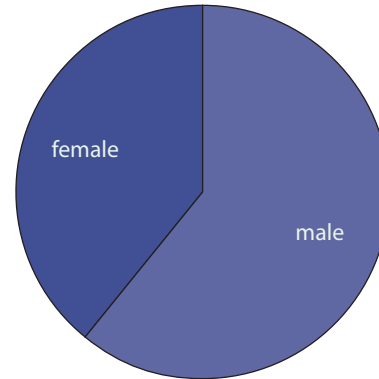
1.2 Profile of Architects

TABLE 1-2
Gender of architects analysed by country

per cent	gender of architects	
	male	female
Austria	82	18
Belgium	73	27
Bulgaria*	47	53
Croatia	47	53
Czech Republic*	62	38
Denmark	50	50
Estonia*	85	15
Finland	53	47
France	62	38
Germany	57	43
Greece	42	58
Ireland	71	29
Italy	62	38
Latvia*	42	58
Luxembourg	75	25
Malta*	73	27
Netherlands*	79	21
Portugal	57	43
Romania	55	45
Slovakia	79	21
Slovenia*	44	56
Spain	71	29
Sweden	49	51
Switzerland	73	28
Turkey	52	48
United Kingdom	75	25
2014 EUROPE-26**	61	39
2012 EUR-25 **	64	36
2010 EUR- 23 **	69	31
2008 EUR-17**	63	37

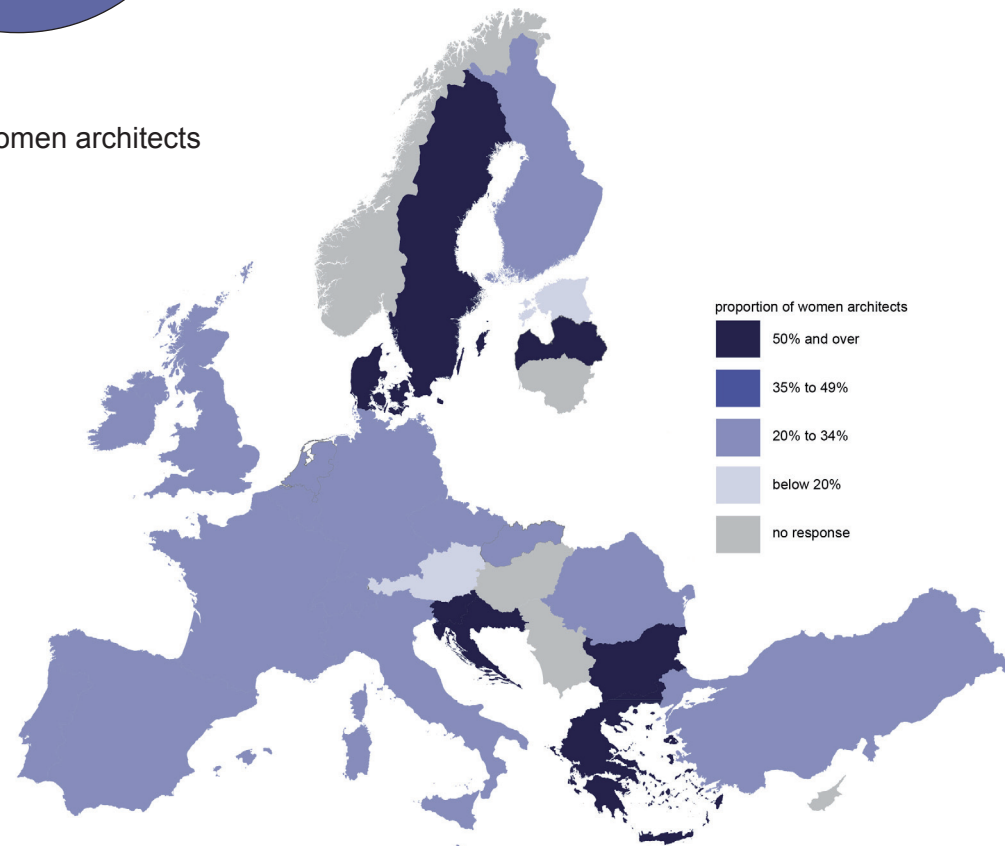
* caution - small sample. Netherlands data source: BNA Benchmark Research 2014 ** weighted to reflect the total architectural population in all participating countries; weighting process described in Appendix

CHART 1-4
Male / female split, all responding architects



Sixty one per cent of the profession in Europe is male, 39 per cent female. This is the lowest proportion of males recorded in the four surveys. Highest proportion of female architects is recorded in Greece, Latvia, Slovenia, Croatia, Bulgaria and Sweden - each of which has over 50 per cent female. The most male dominated countries are Austria and Estonia, each with over 80 per cent males.

CHART 1-5
Proportion of women architects



1.3 Employment Status

TABLE 1-3
Employment status of architects analysed by country

per cent	working full-time	working part-time	not working	retired
Austria	89	11	0	0
Belgium	92	6	0	2
Bulgaria*	67	27	3	4
Croatia	94	3	2	0
Czech Republic*	92	0	0	8
Denmark	85	10	4	1
Estonia*	100	0	0	0
Finland	91	6	3	0
France	92	6	1	1
Germany	81	14	2	2
Greece	58	28	12	3
Ireland	79	16	4	1
Italy	70	20	7	3
Latvia*	80	9	11	0
Luxembourg	91	6	1	2
Malta*	88	13	0	0
Netherlands*	87	13	0	0
Portugal	69	11	19	1
Romania	78	12	4	7
Slovakia	84	7	4	6
Slovenia*	78	12	6	4
Spain	70	18	12	1
Sweden	87	10	1	1
Switzerland	84	14	2	1
Turkey	86	8	3	4
United Kingdom	80	13	2	6
2014 EUROPE-26 ***	78	15	5	2
2012 EUROPE-25	76	15	6	2
2010 EUROPE-23 **	84	11	4	1
2008 EUROPE-17**	87	9	3	2

* caution - small sample

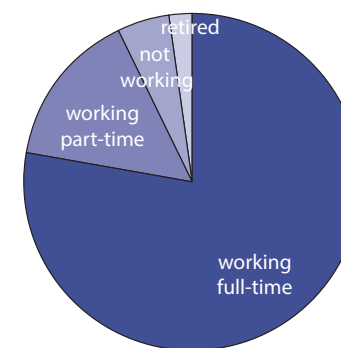
** The basis of calculating historical figures (2010 and 2008) has changed. Data is presented as reported and is no longer 'adjusted' . This is discussed in the Appendix.

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

Seventy eight per cent of architects are working full-time, 15 per cent working part-time, and 7 per cent not working. The proportion of architects who are in full-time work is higher than in the 2012 survey, but remains lower than in both 2010 and 2008.

Highest levels of reported unemployment or not working for other reasons are recorded amongst architects in Portugal, Spain and Greece - the same countries as in 2012. The highest levels of part-time employment are in Greece and Bulgaria (small sample) - in both cases a higher proportion than in 2012.

CHART 1-6
Employment status of architects



1.4 Field of Employment

More than one quarter of architects describe themselves as Sole Principals (29 per cent); this is the largest single field of employment. The highest proportions of Sole Principals are found in Austria (72 per cent), Greece (51 per cent) and Italy (47 per cent).

Nine per cent of architects are Partners or Directors (highest proportions in Slovenia, Latvia, Luxembourg, Ireland, United Kingdom and Austria). Seven per cent are Associates and a further 20 per cent are salaried architects working in private practice (highest proportion in Bulgaria, Turkey and Germany).

least half of architects in Turkey and the United Kingdom are employed staff working in private practice. Eight per cent of architects work as 'Freelance' architects (over 20 per cent in Slovakia and Belgium), while 7 per cent describe themselves as Agency (37 per cent in Spain).

The proportion of architects working in the public sector is 13 per cent, 7 per cent work for local government at either municipal or regional level. Highest proportions are recorded in Finland (25 per cent) and Denmark (23 per cent). Just 1 per cent of architects work for central government, by far the highest proportion is recorded in Malta (13 per cent).

CHART 1-7
Field of Employment

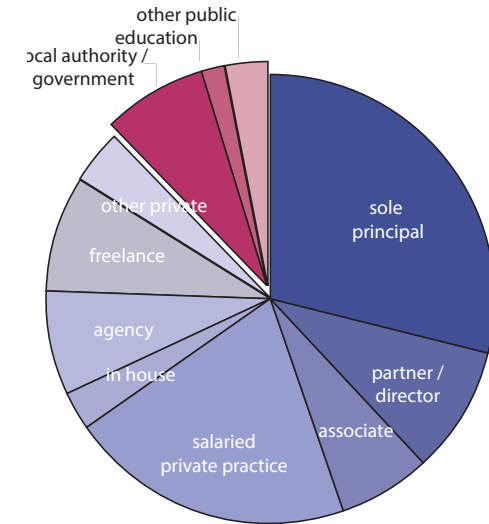


CHART 1-8
Main employment fields by country

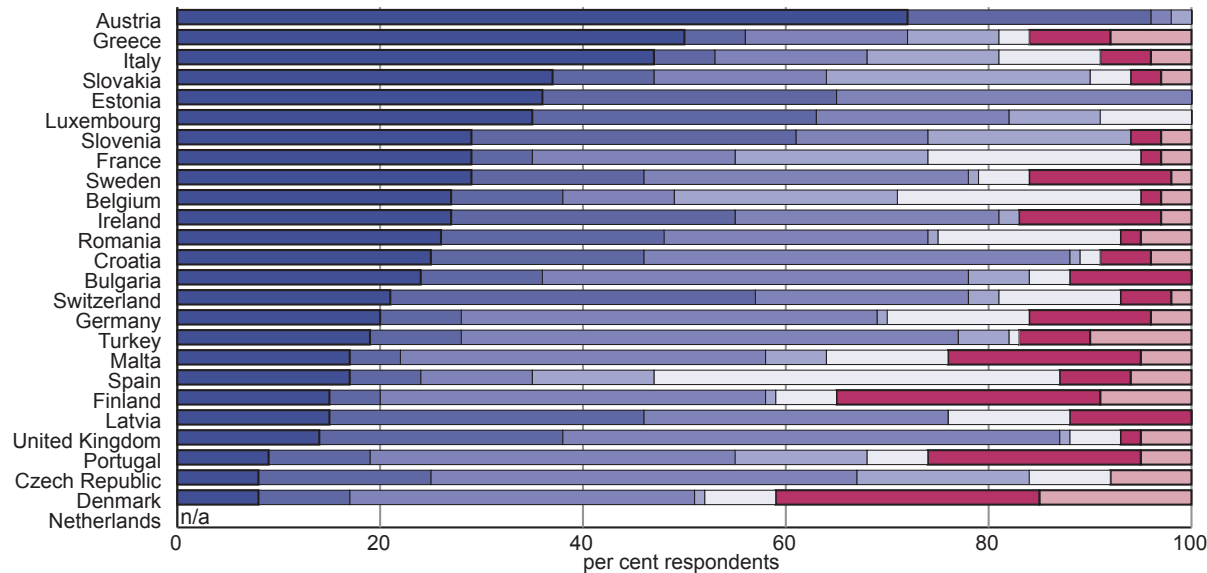


TABLE 1-4

Architects' field of employment by country

per cent	sole principal	partner director	associate	private practice salaried	in-house	agency	freelance	other private	local authority	central govt	education	other public
Austria	72	24	0	2	0	0	2	0	0	0	0	0
Belgium	26	11	7	4	0	23	22	1	2	0	1	2
Bulgaria*	24	12	2	41	0	2	6	2	10	2	0	0
Croatia	25	21	6	36	0	1	1	1	5	0	4	0
Czech Republic*	8	17	17	25	0	0	17	8	0	0	0	8
Denmark	8	9	4	30	2	0	1	5	23	3	9	6
Estonia*	35	29	0	35	0	0	0	0	0	0	0	0
Finland	15	5	4	35	1	1	1	4	25	1	4	5
France	29	6	15	5	1	19	19	1	2	0	0	3
Germany	20	8	1	39	8	3	1	3	12	0	1	3
Greece	51	6	9	7	1	1	9	1	5	3	5	3
Ireland	26	27	8	17	0	0	2	0	11	2	1	2
Italy	47	6	11	4	2	0	13	8	5	0	1	3
Latvia*	15	31	8	23	0	0	0	12	12	0	0	0
Luxembourg	34	28	16	3	0	9	9	0	0	0	0	0
Malta*	17	5	10	25	6	0	6	6	6	13	0	5
Netherlands*	15	10	5	5	0	20	25	3	10	2	5	0
Portugal	9	10	3	34	2	1	13	3	19	2	1	4
Romania	26	22	6	21	1	17	1	0	1	1	3	2
Slovakia	38	10	10	7	0	1	26	3	3	0	2	1
Slovenia*	30	33	3	10	0	0	20	0	3	0	3	0
Spain	17	7	2	9	0	37	12	3	7	0	3	3
Sweden	29	17	13	19	1	3	1	1	14	0	2	0
Switzerland	22	37	5	16	1	10	3	1	4	1	1	1
Turkey	19	9	1	49	0	0	5	1	5	2	5	5
United Kingdom	14	24	16	35	1	0	1	4	1	1	3	2
2014 EUROPE-26 **	29	9	7	20	2	7	8	4	7	1	2	3
2012 EUROPE-25 **	32	11	7	16	2	8	10	5	5	1	1	3
2010 EUROPE-23 **	39	12	6	16	1	4	11	4	3	1	2	2
2008 EUROPE-17**	24	16	5	22	3	6	9	4	6	1	2	3

* caution - small sample Netherlands: BNA Benchmark Research 2014 all participating countries.

** weighted to reflect the total architectural population in

1.5 Years Qualified as an Architect

Just over a quarter of architects have been qualified for 25 years or more. Another quarter have been qualified for between 15 and 24 years. So about half the profession has been qualified for less than 15 years.

Highest levels of the most experienced architects are recorded in Estonia (50 per cent qualified for 25 years or more), the Czech Republic and Slovakia (46 per cent in both). The highest proportion of architects qualified for five years or fewer are recorded in Turkey (35 per cent) and Portugal (32 per cent).

CHART 1-9
Number of years architects have been qualified

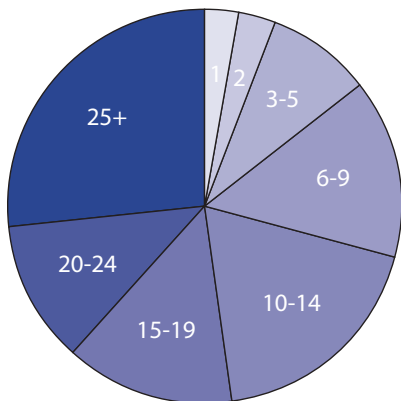


TABLE 1-5
Number of years qualified as an Architect, analysed by country

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	5	4	10	17	20	13	10	21
Belgium	4	4	12	12	14	12	10	32
Bulgaria*	6	1	14	14	13	3	14	35
Croatia	5	9	14	8	16	9	12	27
Czech Republic*	8	0	23	15	0	0	8	46
Denmark	4	3	7	8	14	14	14	36
Estonia*	0	0	5	5	15	20	5	50
Finland	1	2	8	6	11	15	14	41
France	3	2	8	11	16	14	12	35
Germany	6	6	11	16	15	14	13	20
Greece	1	3	16	18	15	7	9	31
Ireland	0	1	3	5	16	19	13	44
Italy	0	1	7	15	24	16	13	25
Latvia*	3	0	0	8	6	25	14	44
Luxembourg	0	1	5	8	21	28	13	25
Malta*	0	3	16	15	19	4	16	27
Netherlands*	2	4	10	14	20	13	14	23
Portugal	7	7	18	20	20	11	6	11
Romania	0	0	10	18	18	7	6	40
Slovakia	0	0	2	11	19	11	10	46
Slovenia*	0	0	0	15	27	12	13	33
Spain	1	3	6	17	23	15	10	24
Sweden	3	5	11	14	14	12	8	33
Switzerland	2	1	7	13	18	16	15	30
Turkey	8	10	19	13	9	9	6	26
United Kingdom	4	5	8	12	12	12	9	37
2014 EUR-26 **	3	3	9	15	19	14	12	27
2012 EUR-25 **	3	4	12	16	19	11	11	24
2010 EUR-23 **	3	5	16	14	12	9	12	28
2008 EUR-17**	4	3	11	17	17	12	13	23

* caution - small sample Netherlands: BNA Benchmark Research 2014
** weighted to reflect the total architectural population in all participating countries.

1.6 Age Profile of Architects

The age profile of the profession peaks at age 40 to 44. One third of the profession is younger than 40, two thirds older. The map, right, shows where there are high proportion of architects aged under 40; countries with the largest number of young architects are Portugal, Turkey and Greece.

The age profile for women is younger than it is for men; 46 per cent of women are aged under 40, compared with 26 per cent of men.

CHART 1-10
Age profile of architects

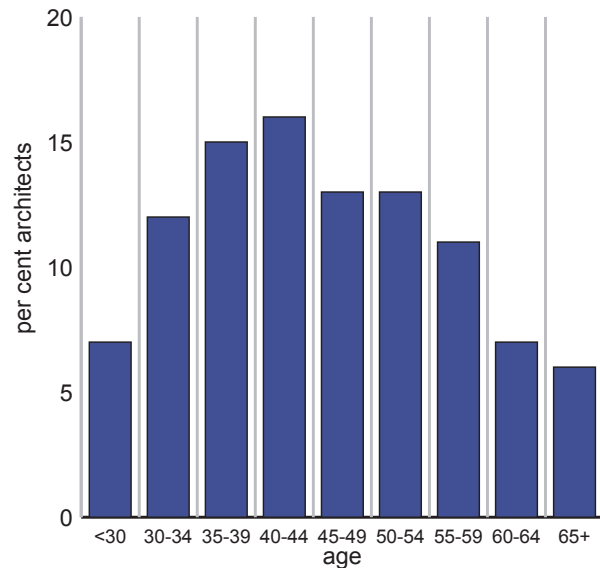


CHART 1-11
Proportion of architects aged under 40

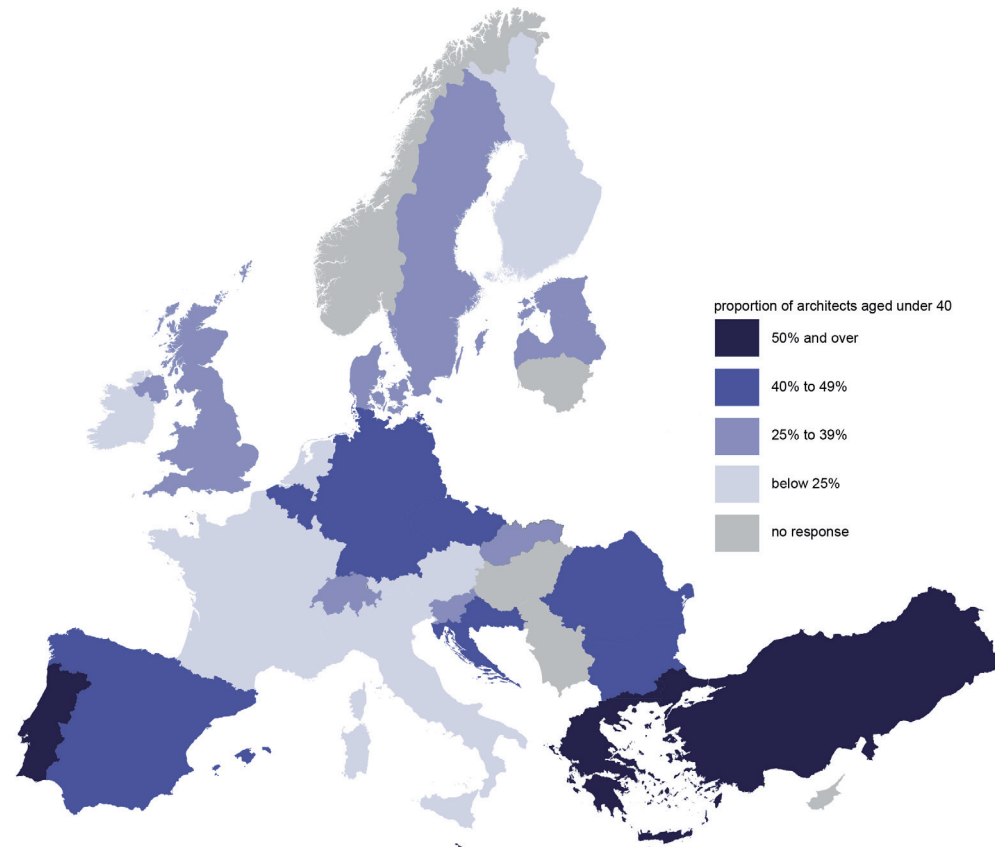


TABLE 1-6

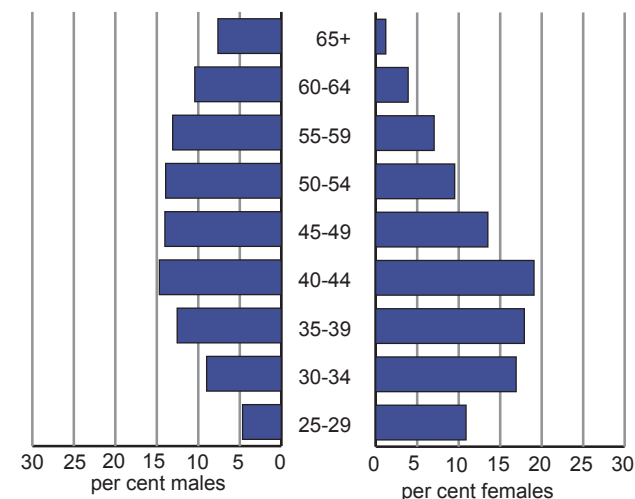
Age of Architects analysed by country

per cent	age of architects								
	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	1	2	17	21	19	12	11	9	7
Belgium	18	12	15	13	7	12	11	8	5
Bulgaria*	20	20	6	5	9	11	8	15	6
Croatia	18	12	14	12	9	15	9	8	3
Czech Republic*	23	15	8	0	0	0	31	15	8
Denmark	6	8	12	14	11	14	13	15	7
Estonia*	0	5	25	10	15	20	15	5	5
Finland	4	8	8	14	14	15	16	17	3
France	6	6	12	15	10	18	16	10	8
Germany	11	15	15	14	14	13	8	6	5
Greece	10	22	18	8	5	12	16	7	1
Ireland	0	7	12	20	17	15	13	9	6
Italy	1	9	13	20	18	14	11	8	5
Latvia*	6	6	17	14	14	11	25	3	6
Luxembourg	1	8	13	30	15	13	9	7	5
Malta*	24	9	19	7	11	12	9	4	4
Netherlands*	18	17	19	11	13	12	6	3	1
Portugal	20	26	22	12	7	5	4	2	2
Romania	6	21	15	8	6	7	11	18	9
Slovakia	2	9	17	11	11	12	17	12	8
Slovenia*	0	10	23	21	10	19	6	8	4
Spain	5	16	20	18	11	10	11	6	4
Sweden	6	14	14	12	10	11	12	14	7
Switzerland	4	11	18	15	15	16	11	9	3
Turkey	39	13	10	9	6	6	8	5	5
United Kingdom	8	12	13	14	11	10	11	7	13
2014 EUR-26	7	12	15	16	13	13	11	7	6
2012 EUR-25 **	9	15	16	14	13	12	10	6	4
2010 EUR-23 **	10	15	15	10	12	12	12	8	4
2008 EUR-17**	9	14	19	13	13	14	10	5	2

* caution - small sample Netherlands: BNA Benchmark Research 2014
 ** weighted to reflect the total architectural population in all participating countries.

CHART 1-12

Population pyramid - analysis of architects by age and gender



2 Architecture - the Market



Architect: Ibelings van Tilburg architecten
Project: De Karel Doorman – Winner of the
BNA Building of the Year 2013 – Public Prize
Photographer: Ossip van Duivenbode
Place: Rotterdam – The Netherlands

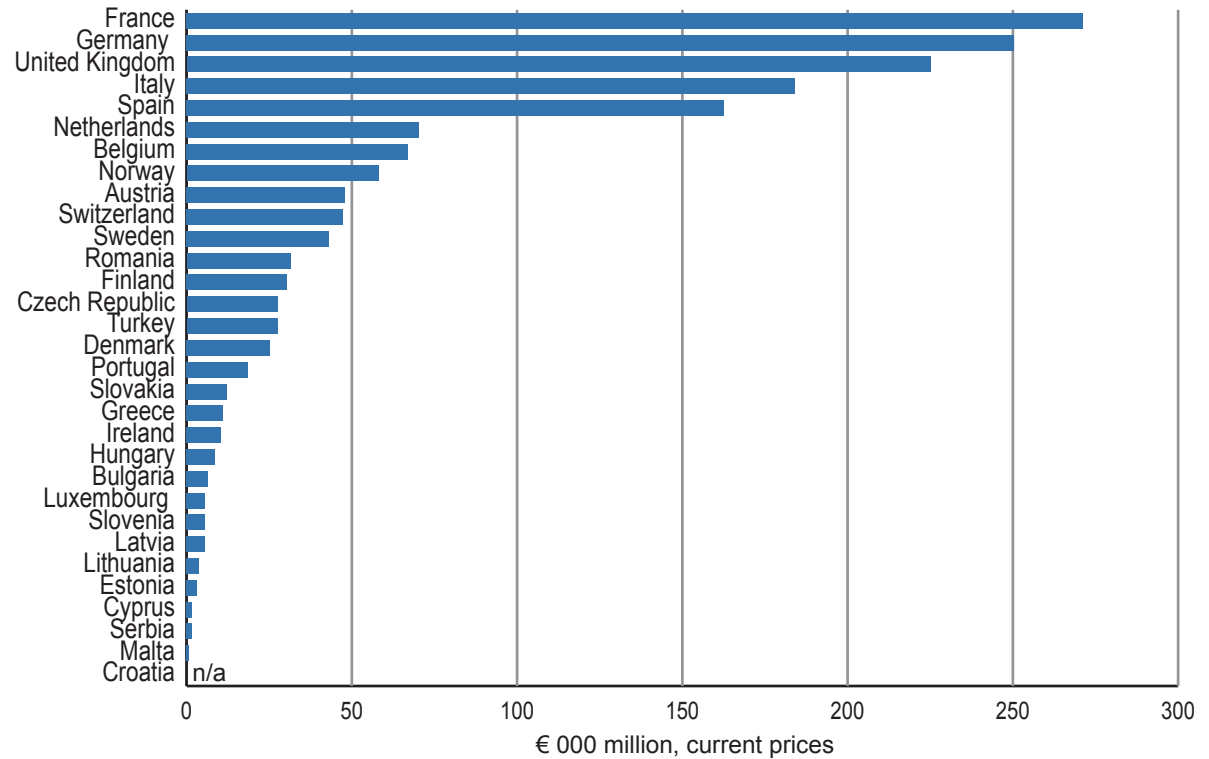
2.1 The Construction Market in Europe

The total value of the European construction market ('EUROPE - 31') is estimated to be worth €1 664 billion in 2013. This includes civil engineering and infrastructure work.

Five countries - France, Germany, the UK, Italy and Spain - stand out as having the highest construction output in Europe, and between them these five countries account for two thirds of total European construction output.

Construction output for 2013 measured per head of the general population averages €2 940 (see table 2-2). Luxembourg and Norway record the highest values per head.

CHART 2-1
Size of Construction Market, Europe, 2013



Base: all 31 European countries
Source: compiled from Eurostat and Turkstat data. Mirza & Nacey estimates where latest data is not available.



TABLE 2-1

Size of construction market Millions of Euros Current Prices

€ millions	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Austria	33 408	34 910	37 226	40 828	45 492	44 183	43 980	45 686	47 616	47 832
Belgium	42 200	44 663	51 163	54 501	59 712	59 563	63 101	69 094	69 666	66 969
Bulgaria	3 717	4 580	6 361	8 780	11 723	10 175	7 788	7 709	6 974	6 608
Croatia (2)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Cyprus	2 378	2 773	3 172	3 788	4 292	3 375	3 193	2 944	2 372	1 671
Czech Republic	19 627	22 225	26 946	32 522	37 003	32 626	33 785	33 298	29 507	27 514
Denmark	23 311	25 075	28 856	29 978	29 489	25 522	24 319	26 740	27 006	25 364
Estonia	1 759	2 327	3 027	3 779	3 552	2 285	1 988	2 670	3 184	3 208
Finland	21 848	24 091	25 893	29 888	32 035	27 824	28 291	30 612	31 197	30 292
France	204 850	222 125	245 919	269 888	284 173	265 318	256 258	270 021	275 199	271 139
Germany	190 470	185 480	198 740	207 430	220 440	220 360	230 770	250 830	250 810	250 337
Greece	25 915	30 629	40 426	41 205	36 739	31 316	21 769	17 874	11 889	10 927
Hungary	9 694	10 984	10 939	10 984	11 779	10 198	9 019	8 543	7 852	8 520
Ireland	34 339	40 133	47 488	49 659	42 620	17 292	10 998	10 077	9 245	10 301
Italy	198 033	211 355	221 120	231 570	233 916	216 121	213 092	214 126	206 654	184 111
Latvia	2 673	3 329	4 868	7 100	7 596	4 803	3 563	4 110	5 096	5 481
Lithuania	2 444	3 008	4 122	5 774	6 343	3 069	2 752	3 407	3 331	3 733
Luxembourg	3 976	4 215	4 504	5 183	5 506	5 395	5 234	5 583	5 838	5 579
Malta	526	621	651	707	760	786	799	790	771	744
Netherlands	65 645	68 720	73 719	80 454	86 687	83 713	75 591	79 117	73 609	70 385
Norway	24 301	29 107	34 030	41 301	43 726	37 103	40 962	47 960	55 474	58 076
Portugal	32 000	32 797	32 237	32 493	33 019	30 038	29 512	26 556	22 255	18 710
Romania	8 440	11 879	16 401	24 942	32 537	27 156	31 479	30 894	31 606	31 461
Serbia (1)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	2 202	1 975	1 665
Slovakia	5 655	7 194	9 170	10 857	14 525	14 113	13 644	13 903	13 047	12 343
Slovenia	5 092	5 660	6 793	8 733	9 827	8 236	7 082	6 101	5 660	5 522
Spain	257 076	305 519	352 945	357 117	314 374	268 643	202 517	172 129	160 342	162 642
Sweden	27 618	28 937	32 468	36 296	35 352	30 242	36 159	40 155	41 775	43 152
Switzerland	33 244	34 740	35 176	34 838	37 950	40 497	46 326	47 135	46 585	47 311
Turkey (3)	13 349	17 296	18 184	23 315	23 572	16 958	23 120	24 752	27 160	27 499
United Kingdom	271 581	280 195	301 718	329 756	280 990	223 242	233 376	239 917	221 709	225 064
EUROPE - 31 (€ 000 millions)	1 565	1 695	1 874	2 014	1 986	1 760	1 700	1 735	1 695	1 664

Source of all data except Turkey: Eurostat, National Accounts by 64 branches - aggregates at current prices. Copyright © Eurostat. All Rights Reserved. 2013 (and, in some cases, 2012) data has been estimated and is based on data from the latest Eurostat Construction Output Production Indices

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

(2) Data not recorded by Eurostat. Data sourced directly from Croatian Bureau of Statistics only appears to refer to construction output by firms with more than 20 employees and therefore does not include a large proportion of construction output. To include this figure would be misleading.

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

Construction output includes civil engineering and infrastructure work.

Construction output has been broadly flat for the last five years. Before then, output had increased year on year between 2000 and 2007, with a small fall in 2008 but a much larger drop in 2009, since when it has not yet recovered.

The latest annual data shows that construction output has fallen by more than 10 per cent in four countries - Italy, Portugal, Serbia and Cyprus; while it has increased by more than 10 per cent in just two countries - Ireland and Lithuania. More countries record falling construction output 2013 than record a rise.

CHART 2-2
Change in Construction Output in EUROPE-31, 2000 to 2013

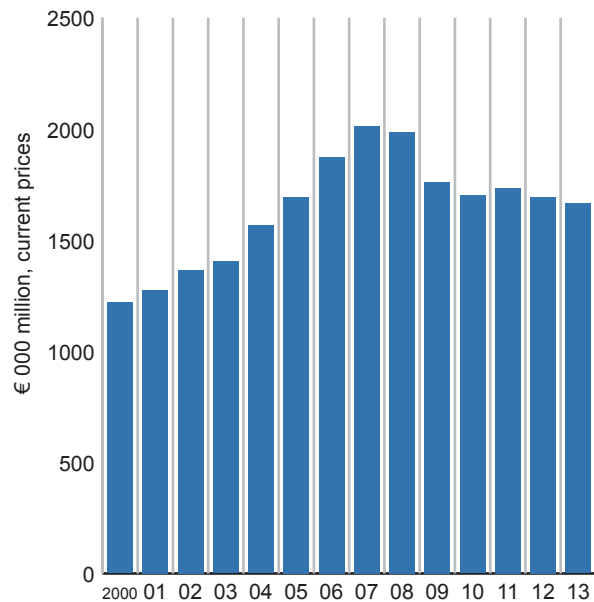
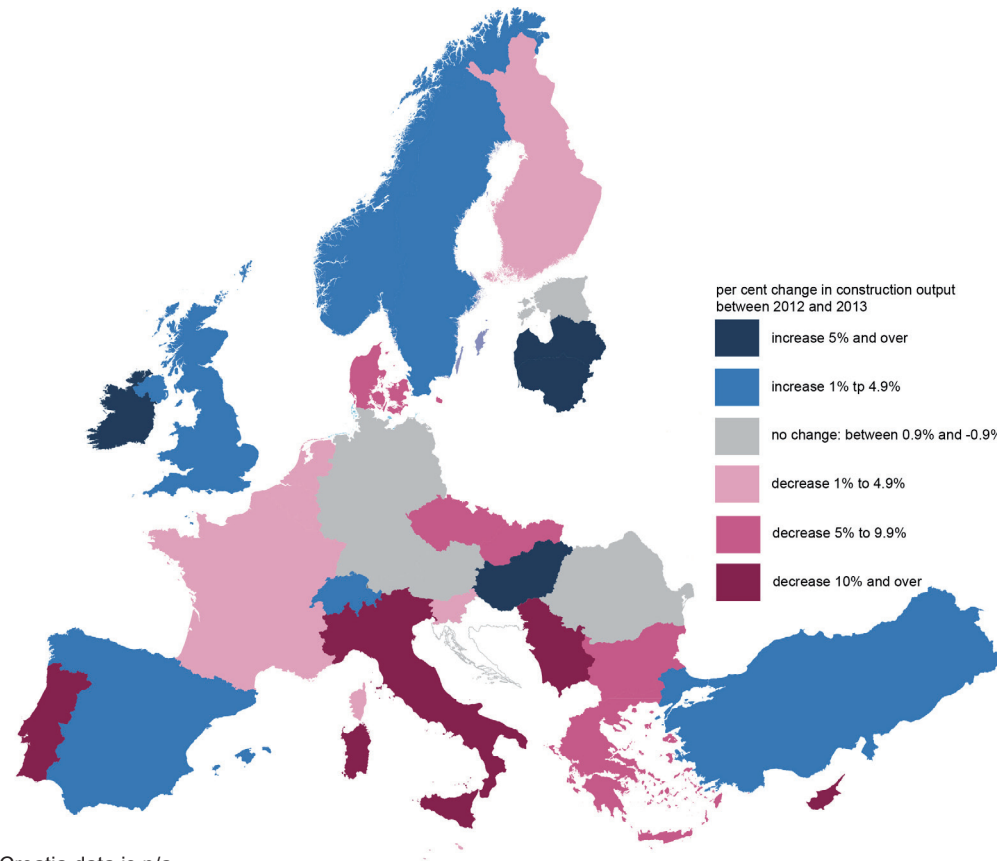


CHART 2-3
Changes in Construction Output, 2012 to 2013



Note: Croatia data is n/a

Base for both map above and chart left: all 31 European countries
Source: compiled from Eurostat, and Turkstat. Mirza & Nacey estimates where latest data is not available.
2013 data used to create the map above has been estimated and is based on data from the latest Eurostat Construction Output Production Indices

TABLE 2-2

Estimated size of construction market, 2013 by country, and comparative values

	construction output (€ million)	population (number as at 01.01.2014)	construction output per head of population (€)	architects (estimated number)
Austria	47 832	8 507 786	5 622	4 650
Belgium	66 969	11 203 992	5 977	15 000
Bulgaria	6 608	7 245 677	912	3 400
Croatia	n/a	4 246 700	n/a	2 200
Cyprus	1 671	858 000	1 947	950
Czech Republic	27 514	10 512 419	2 617	8 200
Denmark	25 364	5 627 235	4 507	10 000
Estonia	3 208	1 315 819	2 438	800
Finland	30 292	5 451 270	5 557	3 300
France	271 139	65 856 609	4 117	29 800
Germany	250 337	80 780 000	3 099	107 200
Greece	10 927	10 992 589	994	17 600
Hungary	8 520	9 879 000	862	4 100
Ireland	10 301	4 604 029	2 237	2 600
Italy	184 111	60 782 668	3 029	153 000
Latvia	5 481	2 001 468	2 739	900
Lithuania	3 733	2 943 472	1 268	1 350
Luxembourg	5 579	549 680	10 150	900
Malta	744	425 384	1 750	650
Netherlands	70 385	16 829 289	4 182	10 900
Norway	58 076	5 109 056	11 367	3 650
Portugal	18 710	10 427 301	1 794	21 200
Romania	31 461	19 942 642	1 578	7 400
Serbia	1 665	7 146 759	233	8 000
Slovakia	12 343	5 415 949	2 279	1 750
Slovenia	5 522	2 061 085	2 679	1 450
Spain	162 642	46 507 760	3 497	51 700
Sweden	43 152	9 644 864	4 474	6 150
Switzerland	47 311	8 136 689	5 815	7 200
Turkey	27 499	76 667 864	359	44700
United Kingdom	225 064	64 308 261	3 500	34 300
EUROPE - 31 - 2014	1 664 162	565 981 316	2 940	565 000

source: Construction output and population data - Eurostat
Copyright © Eurostat. All Rights Reserved. Data for Serbia has been sourced from Statistical Office of the Republic of Serbia. Data for Turkey derived from raw data from Turkstat. In both cases data has been converted to Euros using historical exchange rates as at mid year. The 2013 data (and occasionally the 2012 data) has been derived from Eurostat construction output index rather than absolute figures. The total for EUROPE-31 is therefore a Mirza & Nacey estimate.

Construction output includes civil engineering and infrastructure work.

2.2 The Architectural Market in Europe

The total value of the architectural market in the 26 surveyed countries is estimated to be worth €14.3 billion in 2013/14. This relates to the total value of the revenue generated by the profession. This figure is an estimate and should be considered with caution. The estimate has been grossed-up from survey data (see Appendix I for methodology). If we were to gross up this figure to reflect all 31 European countries, the total estimated value of the architectural market in Europe would be €14.9 billion. This figure is similar to the 2012 estimate for EUROPE-33 but if we compare like with like (EUROPE-31), then the estimated size of the market represented by countries which were included in both the 2012 and 2014 surveys has fallen by 5 per cent.

Germany has the largest market by size, worth an estimated €5 billion. Next largest are the United Kingdom (€2.0 billion) and Italy, (€1.9 billion). No other countries have markets estimated to be larger than €1 billion. Compared with the 2012 survey, estimates of the market

size have increased in only five countries - Germany, Luxembourg, Austria, Sweden and Turkey. Countries showing particularly large falls include France, Greece, Portugal and Italy.

CHART 2-4
Value of Architectural Market, average per Architect

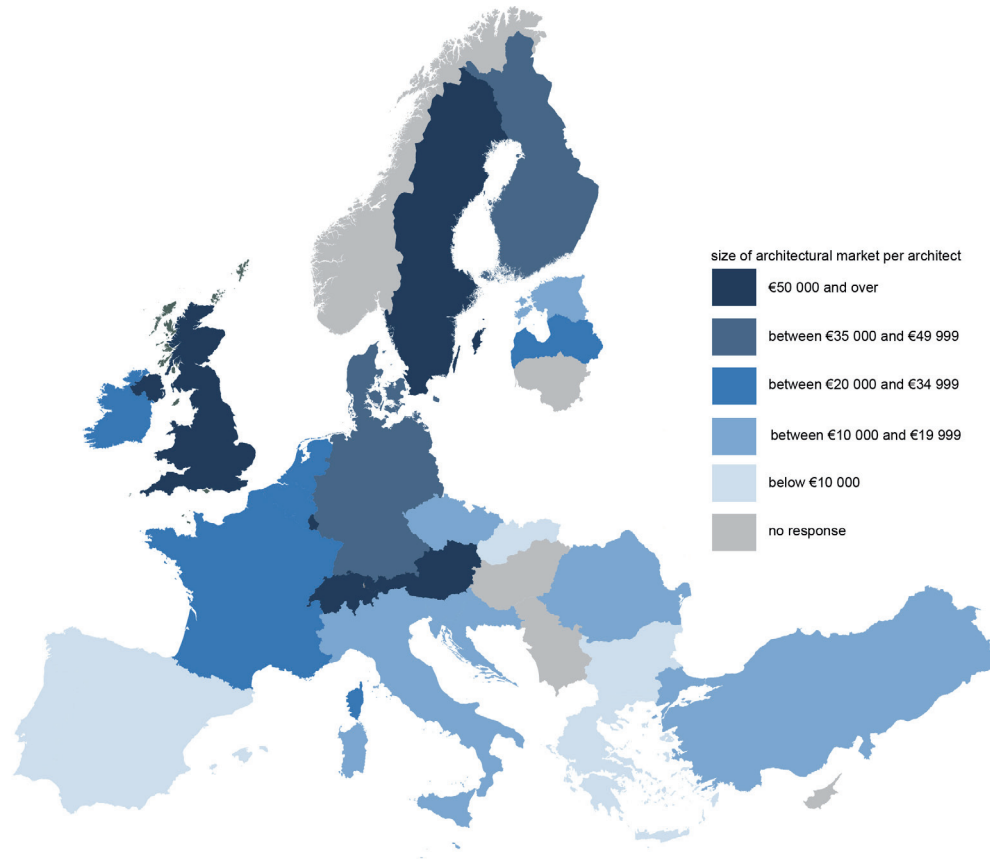


CHART 2-5
Change in estimated value of architectural market in EUROPE-31, 2008-14

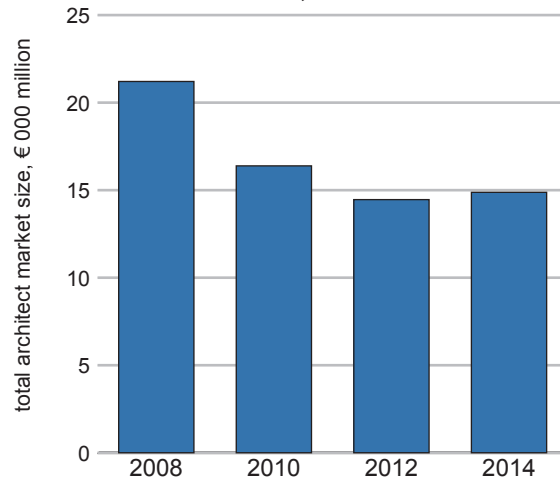


TABLE 2-3

Estimated size of architectural market 2013/14, by country, and comparative values

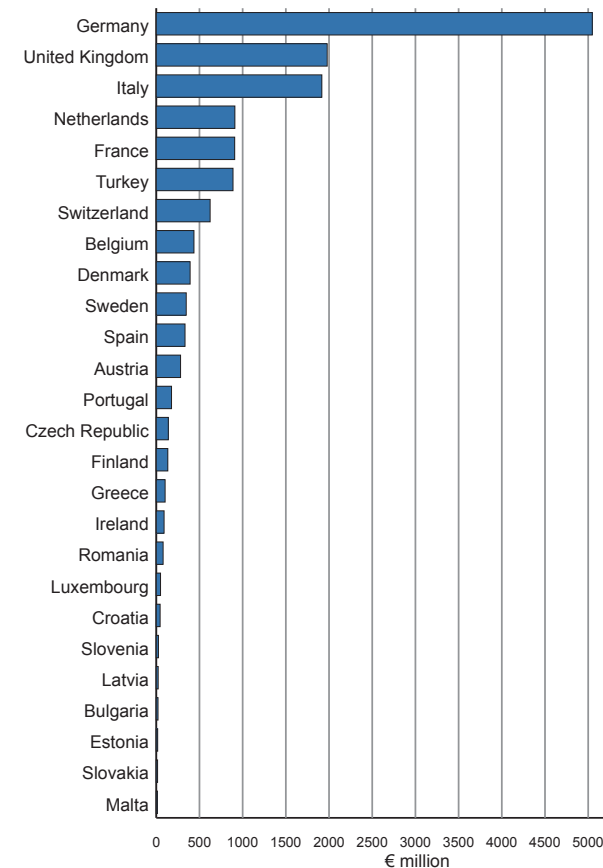
	market size (€000s)	value per architect (€)	value per 1000 population (€)	architectural market as per cent construction	2012 market size (€000s)	2010 market size (€000s)	2008 market size (€000s)
Austria	281 241	60 482	33 057	0.6	262 774	256 292	296 789
Belgium	436 306	29 087	38 942	0.7	529 292	556 280	327 108
Bulgaria*	20 358	5 988	2 810	0.3	26 792	46 116	n/a
Croatia	44 798	20 363	10 549	n/a	50 235	64 290	n/a
Czech Republic*	139 458	17 007	13 266	0.5	153 433	73 045	n/a
Denmark	392 062	39 206	69 672	1.5	447 607	308 697	356 228
Estonia*	16 330	20 412	12 411	0.5	29 277	12 667	27 524
Finland	133 689	40 512	24 524	0.4	161 704	117 456	42 580
France	907 837	30 464	13 785	0.3	1 254 376	1 301 699	1 103 778
Germany	5 047 349	46 010	62 483	2.0	4 192 657	4 094 601	3 988 103
Greece	102 646	5 832	9 338	0.9	170 961	289 623	294 149
Ireland	90 682	34 878	19 696	0.9	112 102	172 362	408 855
Italy	1 916 761	12 528	31 535	1.0	2 775 280	2 708 910	n/a
Latvia*	22 530	25 033	11 257	0.4	n/a	n/a	n/a
Luxembourg	49 361	54 845	89 799	0.9	38 264	n/a	31 828
Malta*	13 050	20 076	30 677	1.8	15 565	n/a	13 320
Netherlands*	910 000	70 000	56 250	0.7	807 000	976 000	902 000
Portugal	176 636	8 332	16 940	0.9	261 110	n/a	n/a
Romania	79 471	10 739	3 985	0.3	90 111	63 551	112 659
Slovakia	15 211	8 692	2 809	0.1	n/a	41 000	n/a
Slovenia*	24 874	17 154	12 068	0.5	42 110	10 359	40 501
Spain	332 999	6 441	7 160	0.2	336 420	n/a	n/a
Sweden	347 110	56 441	35 989	0.8	330 785	356 300	145 073
Switzerland	623 667	86 620	76 649	1.3	n/a	n/a	n/a
Turkey	888 440	19 876	13 815	3.2	856 591	960 371	726 778
United Kingdom	1 978 835	57 692	30 771	0.9	2 006 403	1 955 929	2 800 042
2014 EUROPE-26	14 340 253	26 109	27 176	0.9			
2012 EUROPE-25	14 424 668	27 770	25 870	1.0	14 424 668		
2010 EUROPE-23	14 636 411	33 253	28 716	1.1		14 636 411	
2008 EUROPE-17	11 616 874	45 405	31 017	1.1			11 616 874

'Market size' refers to the architectural market as measured as the sum of the revenues earned by private architectural practices in each country. Data refers to 2013/14. The market size has been estimated, see Appendix for an explanation of the methodology.

* caution - small sample Netherlands: BNA Benchmark Research 2014

CHART 2-6

Estimated value of Architectural Market



2.3 The Architectural Market analysed by building type and sector

In a new question this year, architects say how their work is split between new build and refurbishment. Overall, 57 per cent of work is refurbishment, and 43 per cent new build. Highest levels of new build are recorded in Turkey (75 per cent) and Romania (68 per cent). The highest level of refurbishment work is recorded by architects in Italy (75 per cent).

Housing dominates the market, accounting for 53 per cent of all work. Most of this (40 per cent of all architects' work) relates to individual houses. The highest proportion of work relating to individual housing is in Italy (60 per cent), Greece (51 per cent) and Belgium (48 per cent). The highest share of work which is other private housing is recorded in Turkey (25 per cent) and Switzerland (23 per cent).

Office, retail and industrial work each account for the same share of architects' work - 6 per cent. Together with leisure, the commercial sector accounts for 28 per cent of total work. The proportion of commercial work is particularly high in Turkey and Bulgaria. The proportion of work coming from the public sector is 27 per cent overall, although is around 40 per cent in Denmark, Finland and the Czech Republic.

Compared with the 2012 survey, the work profile has changed little. There is slightly more private housing, and slightly less individual housing, in 2014 than 2012 but the proportion of work coming from the three key groups - housing, commercial and public - is virtually identical.

TABLE 2-4
Proportion of work undertaken by building type, analysed by country

per cent	new build	refurbishment
Austria	52	48
Belgium	47	53
Bulgaria*	55	45
Croatia	52	48
Czech Republic*	56	44
Denmark	47	53
Estonia*	54	46
Finland	57	43
France	47	53
Germany	49	51
Greece	38	62
Ireland	40	60
Italy	25	75
Latvia*	49	51
Luxembourg	57	43
Malta*	59	41
Netherlands*	44	56
Portugal	44	56
Romania	68	32
Slovakia	55	45
Slovenia*	52	48
Spain	37	63
Sweden	49	51
Switzerland	53	47
Turkey	75	25
United Kingdom	46	54
2014 EUROPE-26	43	57
2012 EUROPE-25	n/a	n/a
2010 EUROPE-23	n/a	n/a
2008 EUROPE-17	n/a	n/a

* caution - small sample
Research 2014

Netherlands: BNA Benchmark

TABLE 2-5
Comparison of proportion of the market accounted for different building sectors, and the proportion of practices involved in those building sectors

per cent	per cent of market	per cent of practices involved
private housing	53	89
offices	6	28
retail	6	27
leisure and the arts	3	12
industrial	6	21
health	3	9
education	5	15
public housing	3	10
other private	7	26
other public	9	25

CHART 2-7
Proportion of market by building sector

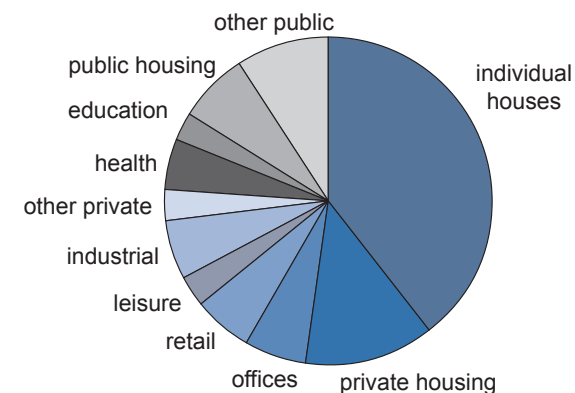


TABLE 2-6

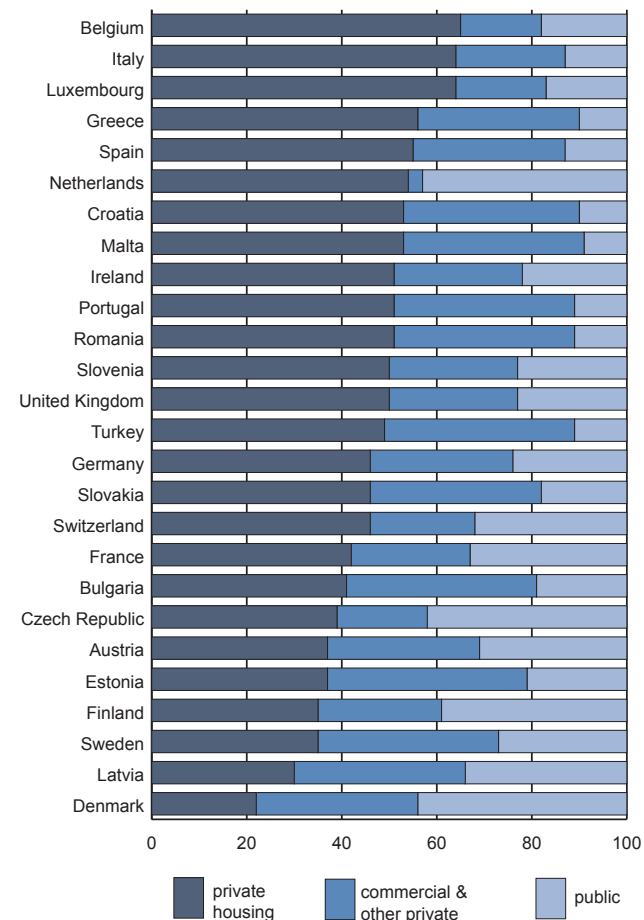
Proportion of work undertaken by building sector, analysed by country

per cent	individual houses	private housing	offices	retail	leisure	industrial	health	education	public housing	other private	other public	TOTAL
Austria	24	13	8	6	5	6	4	8	12	7	7	100
Belgium	48	16	5	3	1	5	4	5	6	3	3	100
Bulgaria*	30	11	7	10	3	10	5	3	5	11	6	100
Croatia	37	15	4	4	5	10	0	6	0	14	4	100
Czech Republic*	37	2	4	6	4	1	20	8	0	4	14	100
Denmark	13	9	8	4	7	5	8	13	10	10	14	100
Estonia*	21	17	14	10	5	6	0	5	11	7	5	100
Finland	22	13	9	7	4	2	5	9	8	4	17	100
France	27	16	6	5	4	4	5	8	9	6	11	100
Germany	30	16	9	3	3	9	3	9	2	6	10	100
Greece	51	6	8	2	6	4	1	3	1	14	5	100
Ireland	41	10	6	7	3	2	6	10	2	9	4	100
Italy	60	4	4	5	2	4	1	2	1	8	9	100
Latvia*	22	8	16	8	2	5	1	7	17	6	9	100
Luxembourg	46	18	8	2	1	3	1	9	3	5	4	100
Malta*	34	20	12	8	2	12	4	1	1	4	3	100
Netherlands*	35	20	0	0	3	0	0	0	23	0	20	100
Portugal	40	11	5	13	3	7	2	3	1	10	5	100
Romania	37	13	9	6	6	11	2	4	3	6	2	100
Slovakia	34	11	11	5	6	6	2	2	3	8	11	100
Slovenia*	43	8	5	7	4	9	2	10	4	3	7	100
Spain	36	20	5	8	3	4	1	3	1	12	8	100
Sweden	17	18	14	7	7	4	2	8	3	5	14	100
Switzerland	23	23	9	2	2	6	5	9	6	3	12	100
Turkey	24	25	8	12	4	10	2	3	1	6	5	100
United Kingdom	32	18	6	5	7	3	4	10	3	6	6	100
2014 EUROPE-26	40	13	6	6	3	6	3	5	3	7	9	100
2012 EUROPE-25	42	9	6	6	3	5	2	4	3	9	11	100
2010 EUROPE-23	30	14	8	5	4	6	4	6	6	7	10	100
2008 EUROPE-17	31	14	10	5	3	8	4	6	4	7	10	100

* caution - small sample

CHART 2-8

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



2.4 The Architectural Market analysed by type of client

Half of architects' work is for Individual clients. This is now a higher proportion than in previous surveys (45 per cent in 2012). Public sector clients account for 24 per cent of work, exactly the same as in 2012. Eleven per cent of clients are limited companies and 7 per cent PLCs (both about the same as in 2012). However, compared with the last survey, architects now have fewer developer clients - 8 per cent compared with 11 per cent in 2012.

CHART 2-9
Proportion of market by client type

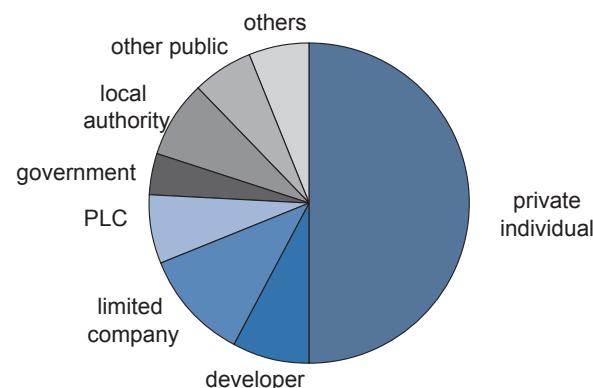


TABLE 2-7
Proportion of work undertaken for different clients, analysed by country

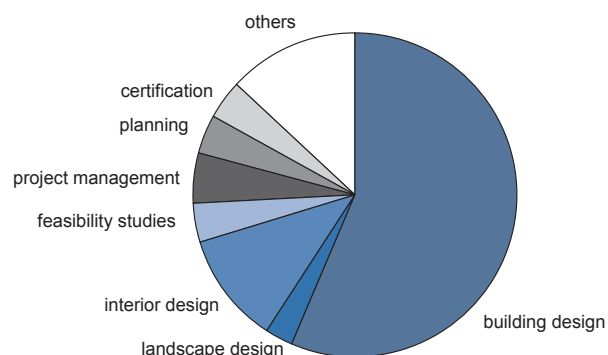
per cent	individuals	developer	limited company	PLC (public limited company)	central government	local government	other public	other private	TOTAL
Austria	46	8	16	3	11	8	4	4	100
Belgium	57	15	8	2	2	7	7	3	100
Bulgaria*	42	15	15	4	2	13	6	3	100
Croatia	47	5	29	4	0	6	2	7	100
Czech Republic*	45	9	5	11	0	20	10	0	100
Denmark	19	10	7	10	8	22	17	6	100
Estonia*	23	29	13	11	2	16	4	3	100
Finland	23	16	21	1	3	16	16	3	100
France	42	10	8	2	2	12	17	7	100
Germany	49	5	12	3	7	12	5	7	100
Greece	72	3	2	12	1	4	3	2	100
Ireland	50	9	13	3	5	4	9	8	100
Italy	57	7	9	10	1	6	6	5	100
Latvia*	31	12	25	4	9	14	3	2	100
Luxembourg	55	20	3	2	9	6	3	2	100
Malta*	45	22	20	3	3	0	2	4	100
Netherlands*	33	0	5	0	25	10	0	27	100
Portugal	57	9	13	3	3	5	5	6	100
Romania	52	8	15	7	2	6	5	3	100
Slovakia	41	11	20	8	1	13	4	3	100
Slovenia*	61	4	13	4	7	6	3	2	100
Spain	57	9	8	6	1	8	6	5	100
Sweden	24	17	19	8	9	13	7	3	100
Switzerland	45	8	4	10	11	13	4	5	100
Turkey	38	9	20	14	3	6	5	5	100
United Kingdom	44	17	11	5	4	5	9	5	100
2014 EUR-26	50	8	11	7	4	8	6	6	100
2012 EUR-25	45	11	11	8	2	8	8	6	100
2010 EUR-23	41	12	13	5	4	10	9	6	100
2008 EUR-17	47	10	14	0	6	9	7	7	100

* caution - small sample

2.5 The Architectural Market analysed by type of service

More than half, 57 per cent, of fee revenue comes from architects' key service of building design. The proportion is over 70 per cent in several countries including France, Belgium, Switzerland and Austria. Building design dominates - all other service types account for a far smaller proportion of revenue. The second most important service type is interior design (11 per cent of total revenue) followed by project management, feasibility studies and planning (between 4 and 5 per cent each). New this year, we have asked about certification work (4 per cent) and property valuation (2 per cent of revenue). 'Other' unnamed services add up to 11 per cent of total revenue.

CHART 2-10
Proportion of market by type of service



* caution - small sample

Netherlands: BNA Benchmark Research 2014

TABLE 2-8
Proportion of work undertaken by each service type

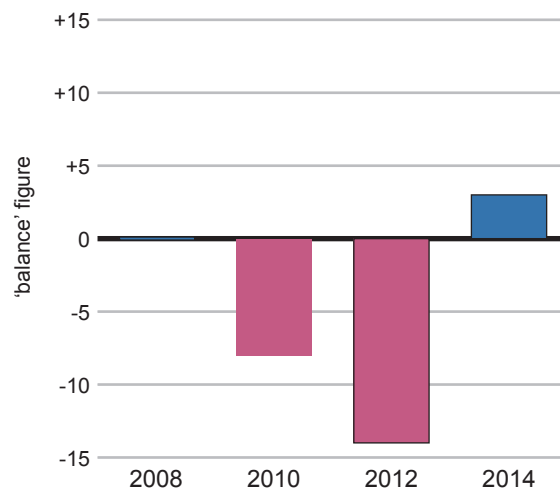
per cent	building design	landscape design	interior design	feasibility studies	project management	planning	certification	property valuation	other service	TOTAL
Austria	72	1	6	5	4	2	3	1	6	100
Belgium	76	1	6	3	6	1	1	1	5	100
Bulgaria*	64	7	7	4	4	6	0	2	5	100
Croatia	62	4	11	1	6	2	2	1	12	100
Czech Republic*	69	4	15	1	1	9	0	0	2	100
Denmark	45	7	7	4	14	7	2	0	13	100
Estonia*	71	3	9	0	2	12	2	1	0	100
Finland	70	2	5	2	3	8	0	1	8	100
France	72	1	6	7	4	4	0	0	6	100
Germany	68	5	9	2	2	3	3	1	6	100
Greece	37	3	18	3	3	2	7	2	25	100
Ireland	68	1	5	5	6	2	5	1	7	100
Italy	45	2	16	4	5	4	5	5	13	100
Latvia*	69	5	5	0	4	1	0	1	16	100
Luxembourg	70	1	4	5	7	5	3	2	4	100
Malta*	47	3	8	4	10	0	6	15	5	100
Netherlands*	60	5	10	5	5	5	n/a	n/a	10	100
Portugal	56	1	13	5	6	6	2	2	9	100
Romania	66	2	8	6	4	9	1	1	4	100
Slovakia	64	5	14	0	4	9	0	0	3	100
Slovenia*	64	3	13	3	9	4	1	0	3	100
Spain	47	1	10	2	5	5	10	5	16	100
Sweden	59	2	8	6	5	12	1	0	6	100
Switzerland	72	0	4	8	4	3	0	1	6	100
Turkey	66	1	10	2	11	1	2	1	7	100
United Kingdom	69	2	6	8	5	3	1	0	6	100
2014 EUR-26	57	3	11	4	5	4	4	2	11	100
2012 EUR-25	50	2	14	6	7	6	n/a	n/a	16	100
2010 EUR-23	69	2	8	4	6	7	n/a	n/a	4	100
2008 EUR-17	66	3	9	3	5	4	n/a	n/a	9	100

2.6 Future Prospects

Almost half (47 per cent) of all responding architects expect 'no change' to their workloads in the next 12 months. As for the rest, they are split nearly evenly between expecting more work, and expecting less. On balance, taking the difference between the optimists and pessimists, there is a 3 per cent majority expecting more work. This 'balance' figure of +3 is the first positive figure since this survey began, and compares with -14 in 2012.

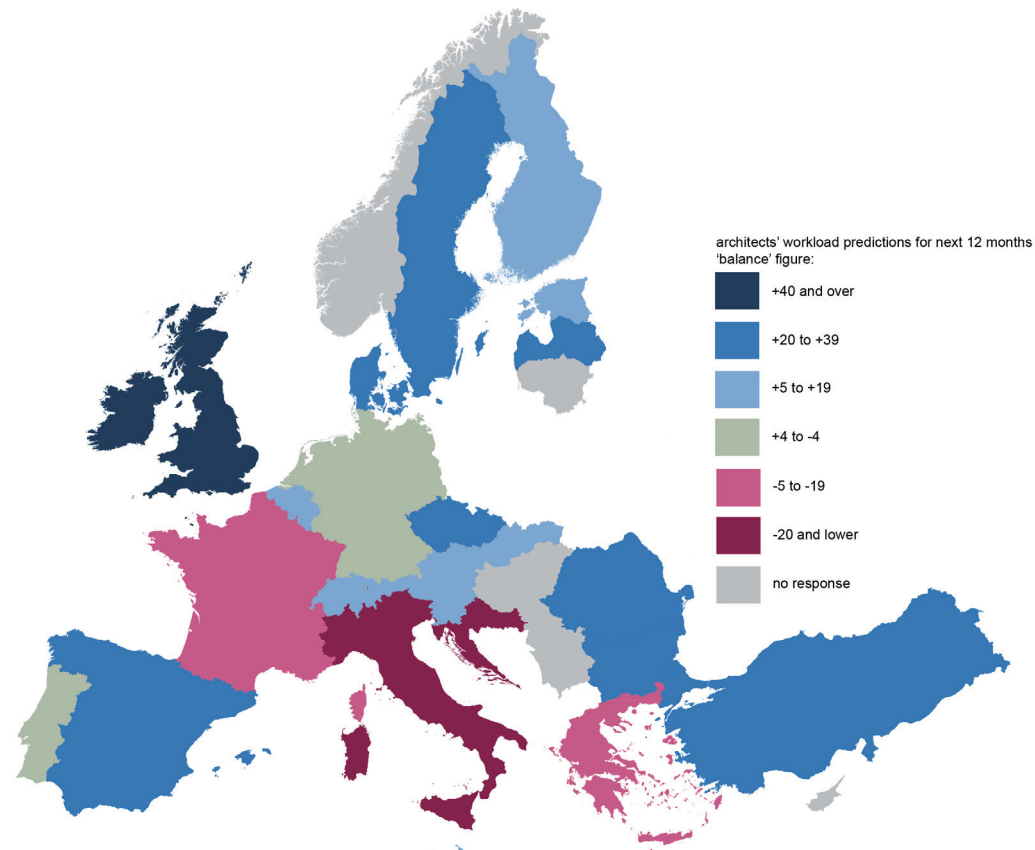
Twenty one out of the 26 countries surveyed have a positive 'balance' figure for the coming 12 months; the Europe average is pulled down by a substantial negative 'balance' in Italy.

CHART 2-11
Change in workload predictions (balance figure), all survey countries, 2008-14



Alongside Italy, Croatia records a 'balance' figure worse than -20. More than 30 per cent of architects in these two countries, as well as in France and Greece, say they expect workloads to fall in the next 12 months.

CHART 2-12
Workload predictions for 2015



Greatest optimism is expressed by architects in Ireland ('balance' figure of +60) and the United Kingdom (+49). In those two countries, as well as Turkey, at least half of all responding architects say they expect workloads to increase.

TABLE 2-9

Future workload prospects for 2015, analysed by country

per cent	per cent of Principals who expect their practice workloads to change over the coming 12 months			balance**
	up	no change	down	
Austria	31	51	18	+14
Belgium	28	49	22	+6
Bulgaria*	33	56	11	+22
Croatia	14	52	34	-21
Czech Republic*	33	56	11	+22
Denmark	36	58	7	+29
Estonia*	7	93	0	+7
Finland	27	65	9	+18
France	22	38	39	-17
Germany	22	59	19	+3
Greece	21	47	31	-10
Ireland	66	27	6	+60
Italy	16	43	41	-24
Latvia*	44	44	11	+33
Luxembourg	23	58	19	+4
Malta*	40	32	28	+12
Netherlands*	0	100	0	0
Portugal	30	43	27	+3
Romania	39	46	15	+24
Slovakia	27	58	14	+13
Slovenia*	28	56	16	+13
Spain	39	45	16	+24
Sweden	44	45	11	+33
Switzerland	24	62	14	+11
Turkey	50	34	17	+33
United Kingdom	59	31	10	+49
2014 EUROPE-26	28	47	25	+3
2012 EUROPE-25	21	43	35	-14
2010 EUROPE-23	24	44	32	-8
2008 EUROPE-17	28	45	28	0

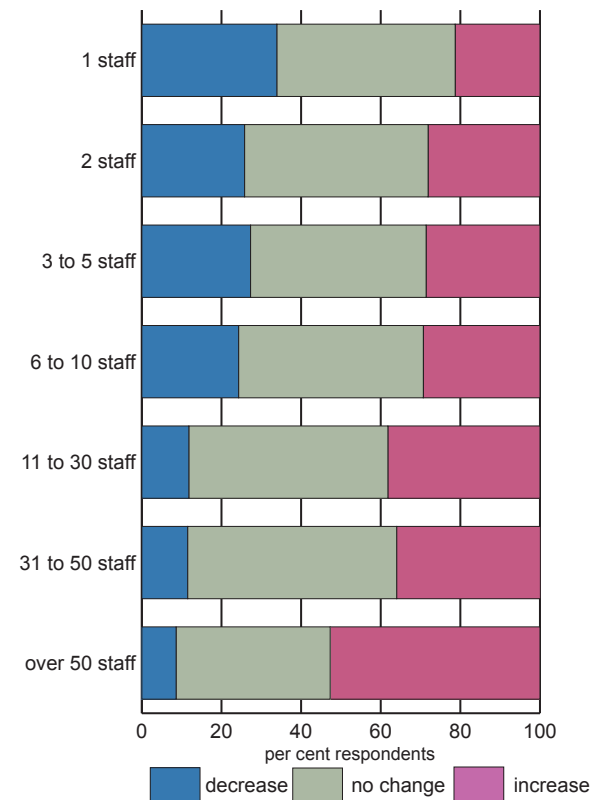
* caution - small sample

Netherlands: BNA Benchmark Research 2014

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

CHART 2-13

Future workload prospects for 2015, analysed by size of respondent's organisation



3 Architecture - the Practice



3.1 Profile of Architectural Practices

The number of private architectural practices in EUROPE-26 is estimated to be 163 000. This figure has been estimated by creating a model and then inserting data from the survey. The model is described in Appendix I. Grossing-up this figure to reflect all 31 European countries produces an estimate of 169 000 private architectural practices in Europe, 6 per cent higher than the 2012 estimate of 160 000 practices*.

The majority of private practices are one person practices. The 2014 estimate is that 74 per cent of all practices comprise one person, this is higher than in previous surveys and is likely to be a result of the recession. There are now

estimated to be fewer medium sized practices in Europe, again most probably due to the economic crisis.

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

* Methodological Note: The base 'EUROPE-31' is different from the base used for the 2012 survey. Previously 'EUROPE-33' included FYROM, Bosnia and Poland. Serbia has been included from 2014. The 2012 figure has been re-calculated using the 2014 base number of countries, so the 2012 estimate of 160 000 practices is directly comparable with the 2014 figure, but is different from estimates published in previous survey reports.

CHART 3-1
Change in estimated number of practices in EUROPE-31, 2008-14

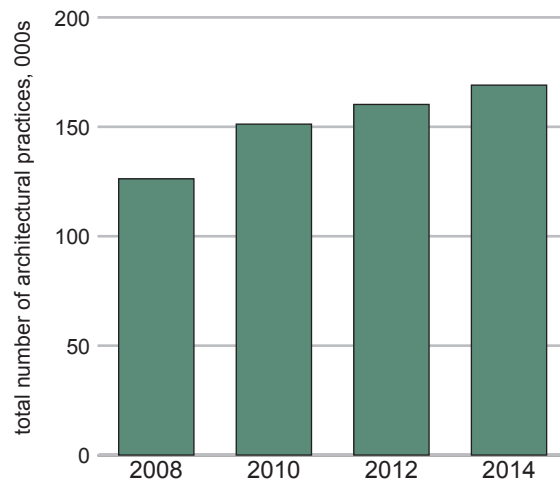


CHART 3-2
Average size of architectural practices

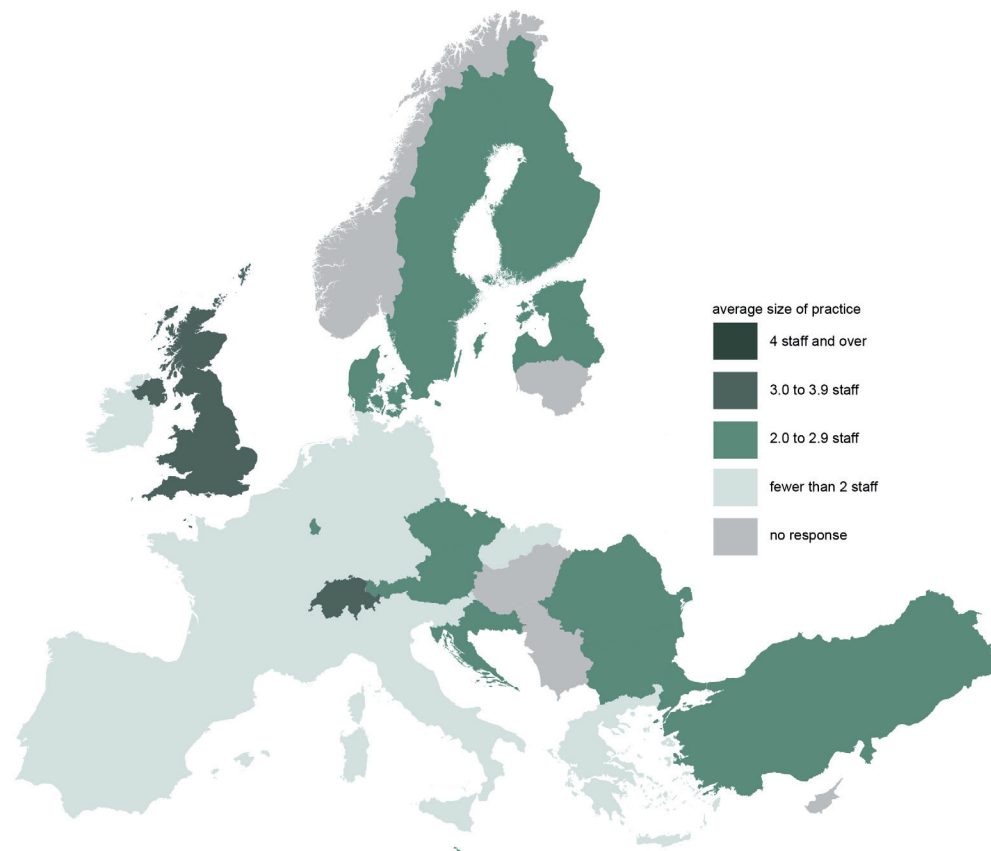


TABLE 3-1

Estimated number and size of architectural practices

number (estimate)	size of architectural practice (number of architectural staff)							TOTAL
	1 staff	2 staff	3 to 5 staff	6 to 10 staff	11 to 30 staff	31 to 50 staff	over 50 staff	
Austria	1 072	393	299	62	15	1	0	1 842
Belgium	2 620	558	396	79	22	2	1	3 677
Bulgaria*	623	129	165	23	21	0	0	962
Croatia	393	214	151	17	4	0	0	778
Czech Republic*	1 438	448	146	75	31	0	0	2 138
Denmark	1 208	278	177	38	48	8	2	1 759
Estonia*	79	123	13	33	3	0	0	252
Finland	481	87	95	41	12	2	0	717
France	5 894	1 351	883	152	20	1	0	8 302
Germany	29 824	6 436	3 633	858	347	16	2	41 117
Greece	4 418	703	416	95	29	0	0	5 661
Ireland	513	144	72	18	4	0	0	752
Italy	47 659	4 623	3 662	292	42	5	1	56 284
Latvia*	157	16	54	18	0	0	0	245
Luxembourg	129	42	54	15	5	1	0	244
Malta*	57	36	29	7	1	0	0	130
Netherlands*	2 116	1 100	429	68	0	0	0	3 714
Portugal	2 971	760	586	133	11	2	0	4 462
Romania	1 257	324	354	92	10	0	0	2 037
Slovakia	339	71	65	11	1	0	0	487
Slovenia*	435	63	68	11	0	0	0	578
Spain	5 598	1 184	840	96	23	0	1	7 742
Sweden	1 041	143	209	78	28	2	3	1 504
Switzerland	712	377	388	102	41	7	1	1 629
Turkey	5 328	1 484	1 816	364	215	18	5	9 231
United Kingdom	3 879	1 332	1 064	372	137	36	13	6 835
2014 EUR-26	120 242	22 423	16 066	3 151	1 069	100	30	163 078
per cent of practices	74	14	10	2	1	<1	<1	100
<i>2012 EUR-25</i>	<i>98 193</i>	<i>28 134</i>	<i>22 663</i>	<i>5 247</i>	<i>1 305</i>	<i>151</i>	<i>35</i>	<i>155 725</i>
<i>2010 EUR-23</i>	<i>86 049</i>	<i>19 477</i>	<i>18 963</i>	<i>5 814</i>	<i>1 973</i>	<i>279</i>	<i>83</i>	<i>132 643</i>
<i>2008 EUR-17</i>	<i>37 369</i>	<i>13 489</i>	<i>10 868</i>	<i>5 318</i>	<i>2 014</i>	<i>449</i>	<i>344</i>	<i>69 851</i>

'architectural staff' includes principals, partners & directors; associates; salaried architects; technical staff

* caution - small sample Netherlands: BNA Benchmark Research 2014

CHART 3-3

Practices analysed by size

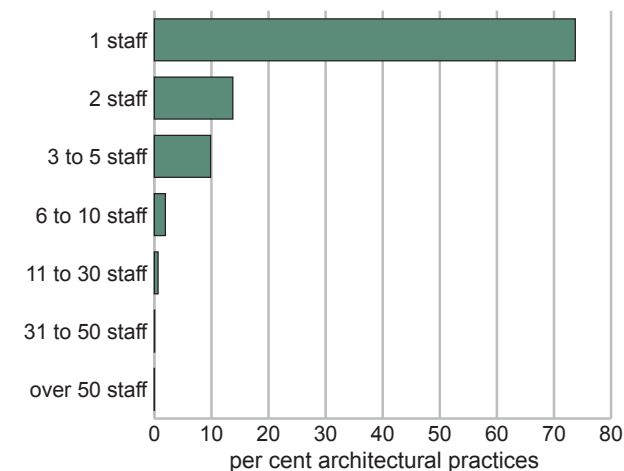
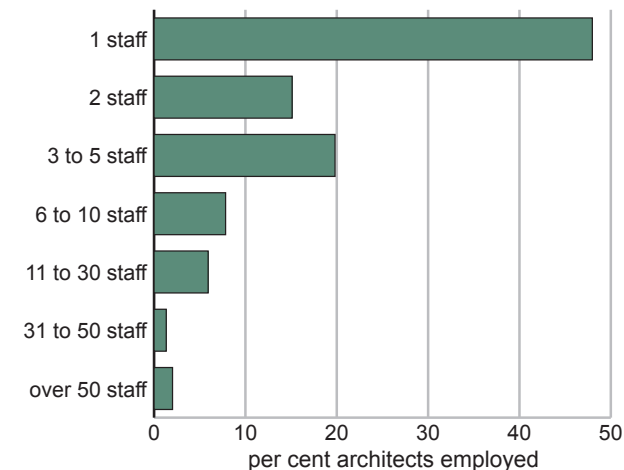


CHART 3-4

Proportion of architects employed in practices of different sizes



3.2 Legal Formation of Practices

The legal formation of architectural practices remains very similar to that reported in the last survey. Almost two out of three practices (65 per cent) consider themselves to be 'independent architects'. Nearly all practices (90 per cent or more) in Greece and Italy are formed by an 'independent architect'; while in Germany, Malta and Spain the proportion is around 70 per cent.

The next most common form of practice is the limited company; 21 per cent of practices have this business formation. At least half of practices in Sweden, Croatia, Turkey, Romania and the United Kingdom are limited companies. Nine per cent of practices are partnerships, and 4 per cent are PLCs or corporations (over 40 per cent in Finland and Switzerland).

Taken together, the proportion of practices which are limited companies, PLCs or corporations is highest in Sweden, Finland, Switzerland and Turkey, while the proportion of practices which are independent architects is highest in Greece, Italy, Portugal and Spain.

CHART 3-5
Proportion of architectural practices that are limited companies / PLCs / corporations

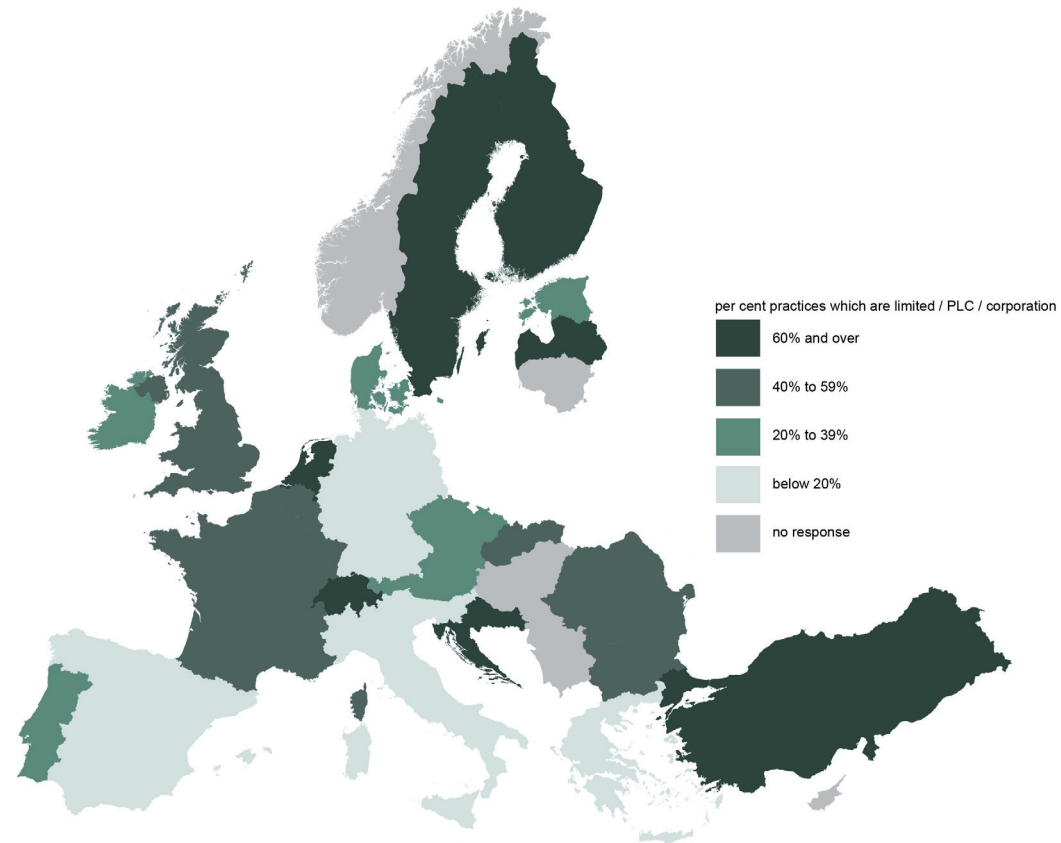


TABLE 3-2

Legal formation of architectural practices - based on type of practice in which Principals work

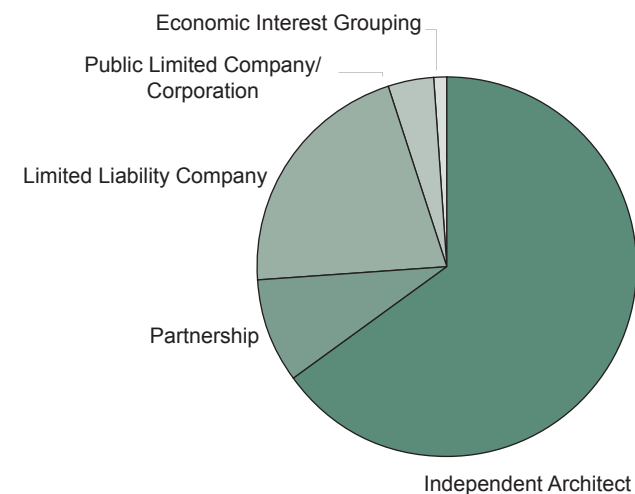
per cent	independent architect	partnership	limited company	PLC (public limited company) / corporation	economic interest group
Austria	64	6	27	2	0
Belgium	48	9	39	4	0
Bulgaria*	26	15	44	6	9
Croatia	17	10	72	0	0
Czech Republic*	17	33	33	0	17
Denmark	39	35	15	11	0
Estonia*	43	36	14	7	0
Finland	32	4	4	59	2
France	51	2	44	3	0
Germany	73	16	11	0	0
Greece	91	5	2	2	0
Ireland	54	6	39	1	0
Italy	90	8	2	0	1
Latvia*	19	13	69	0	0
Luxembourg	40	1	47	12	0
Malta*	75	17	8	0	0
Netherlands*	60	20	20	0	0
Portugal	66	3	28	3	0
Romania	45	2	51	1	0
Slovakia	33	19	46	1	1
Slovenia*	63	20	13	3	0
Spain	70	5	16	2	6
Sweden	22	3	72	2	1
Switzerland	29	2	27	42	0
Turkey	34	6	51	9	0
United Kingdom	32	10	50	8	0
2014 EUROPE-26	65	9	21	4	1
2012 EUROPE-25	67	9	21	2	1
2010 EUROPE-23	51	10	31	5	2
2008 EUROPE-17	52	18	22	4	3

* caution - small sample

Netherlands: BNA Benchmark Research 2014

CHART 3-6

Type of architectural businesses



3.3 Practice Revenue

The average revenue of architectural practices in Europe broadly doubles in each of the three smallest size groups. Average revenues keep rising, in line with a practice's size. Less data is available for the largest practice sizes due to small sample sizes in individual countries.

Revenue relates to respondents' practice revenue in either the calendar year 2013, the 12 months ending 1st May 2014, or the most recent 12 month accounting period. The averages for larger practices are only indicative as the staff intervals are large and there can be a very high variation in revenues reported.

Average practice revenues have fallen in the 2014 survey compared with the 2012 results for 1 person practices, but have nudged a little higher for practices with between 2 and 5 staff. The rise is more convincing for medium and large practices (except the very largest, where a wide variation in practice size makes valid comparisons more difficult). However, the inclusion of new countries in the survey may be responsible for this apparent increase.

Figures are averages (means) and refer to the year 2013/14 or latest accounting year. 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

TABLE 3-3
Average revenue per practice analysed by country and practice size

€	size of practice (number of architectural staff)						
	1	2	3 to 5	6 to 10	11 to 30	31 to 50	51+
Austria	64 151	140 842	316 085	625 091	1 320 892	4 500 000	80 000 000
Belgium	69 150	114 414	256 898	575 696	1 295 022	4 557 143	9 482 143
Bulgaria*	6 732	30 893	34 873	38 343	262 009	n/a	n/a
Croatia	45 167	51 000	79 983	157 775	394 437	n/a	n/a
Czech Republic*	17 232	n/a	254 844	n/a	114 680	n/a	n/a
Denmark	67 491	151 768	428 629	n/a	2 198 650	3 930 622	10 106 272
Estonia*	40 000	31 250	40 000	221 324	453 943	n/a	n/a
Finland	83 536	155 000	199 750	1 082 500	1 311 046	1 166 667	n/a
France	47 963	177 150	246 318	812 891	1 869 100	2 500 000	61 000 000
Germany	66 581	114 326	236 466	623 935	2 492 727	3 433 333	5 500 000
Greece	14 297	18 929	34 895	55 643	222 083	n/a	n/a
Ireland	88 451	85 367	216 415	554 417	1 635 333	n/a	4 300 000
Italy	27 529	50 006	71 072	208 189	969 450	2 005 605	2 270 833
Latvia*	30 815	n/a	104 750	678 886	n/a	n/a	n/a
Luxembourg	66 060	231 165	272 308	486 532	1 518 750	3 875 000	n/a
Malta*	34 250	24 500	206 000	375 000	1 400 000	n/a	n/a
Netherlands*	51 000	105 000	250 000	560 000	1 400 000	2 800 000	6 200 000
Portugal	16 616	38 123	78 645	223 173	863 400	n/a	n/a
Romania	15 142	36 042	51 595	257 460	649 558	n/a	n/a
Slovakia	27 144	23 254	55 144	41 577	40 000	n/a	n/a
Slovenia*	25 213	29 050	95 333	n/a	n/a	n/a	n/a
Spain	24 219	42 864	81 082	153 339	2 731 714	n/a	2 016 218
Sweden	76 801	333 424	323 685	670 488	1 535 152	3 815 512	57 191 484
Switzerland	115 358	187 577	611 079	962 959	2 207 009	5 623 638	5 487 009
Turkey	28 942	31 548	76 535	339 257	1 023 250	n/a	12 182 699
United Kingdom	35 664	105 975	323 552	823 860	2 092 264	n/a	n/a
2014 EUR-26	40 646	87 651	169 450	520 474	1 743 964	9 309 970	15 570 115
2012 EUR-25	41 755	78 648	166 607	437 493	1 397 166	3 626 922	16 538 301
2010 EUR-23	48 295	93 826	192 685	463 320	1 167 050	3 471 360	10 613 801
2008 EUR-17	59 389	117 827	201 693	498 563	1 282 563	3 156 907	4 563 556

* caution - small sample Netherlands: BNA Benchmark Research 2014

3.4 How Practices Charge for their Services

Approaching half (47 per cent) of respondents' current jobs are charged on the basis of a percentage of the contract value. This remains the most common method of calculating charges. Just under one third, 32 per cent, of current jobs are charged as a 'lump sum'. In the case of 14 per cent of jobs, the charge is based on an hourly rate while 7 per cent of jobs are run at risk, with no charge agreed. These results are very similar to the results recorded in the 2012 and 2010 surveys.

France emerges as using the per cent of contract value method the most (75 per cent of jobs charged that way). Sweden (4 per cent) and Finland (9 per cent) stand out as being the only countries to have very low use of the per cent of contract value method of charging - here, hourly charge and lump sum is the more common method.

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

TABLE 3-4
How charges are calculated

per cent current jobs	method of calculating charge			
	per cent of contract value	lump sum	hourly charge	no charge agreed (effectively "at risk")
Austria	50	27	22	2
Belgium	56	23	18	2
Bulgaria*	21	47	20	12
Croatia	46	36	9	10
Czech Republic*	44	34	19	2
Denmark	38	31	25	6
Estonia*	37	44	14	6
Finland	9	48	40	3
France	75	13	9	4
Germany	61	13	23	3
Greece	27	54	7	12
Ireland	32	50	13	5
Italy	40	43	6	11
Latvia*	38	46	12	4
Luxembourg	69	15	12	3
Malta*	53	22	13	12
Netherlands*	6	68	25	2
Portugal	45	28	12	15
Romania	52	32	8	7
Slovakia	39	43	13	4
Slovenia*	46	33	10	11
Spain	53	30	7	11
Sweden	4	34	59	4
Switzerland	59	21	20	1
Turkey	46	36	6	12
United Kingdom	31	45	21	2
2014 EUROPE-26	47	32	14	7
2012 EUROPE-25	43	36	12	9
2010 EUROPE-23	49	29	18	5
2008 EUROPE-17	56	23	16	6

* caution - small sample

Netherlands: BNA Benchmark Research 2014

3.5 Hourly charge-out rates

Average hourly rates refer to the average charged to clients for an hour of the architect's work, before tax. The survey results show that average rates have increased since the 2012 survey, from an average across Europe of €54 per hour for a Principal, to €64 per hour. This is a 19 per cent increase, and the data shows increases in rates charged for architects and technologists, too. Now, average rates for an Architect have increased from €44 to €53 (PPP) while for Technologists the rise has been greatest, from an average of €29 in 2012 to €54 in 2014. This year's rises go most of the way towards correcting the falls in average hourly rates which were recorded in previous surveys.

In this table, the data has been adjusted to take account of different price levels between the countries, using a Purchasing Power Parity (PPP) index. But even adjusting the data reveals an eight-fold difference between the average rate for Principals in the country with the highest rate and that with the lowest.

The PPP hourly charge-out rates (table 3-5) are highest for Principals in Luxembourg, Denmark, Austria and United Kingdom. Lowest hourly rates are recorded in Romania. The pattern is very similar for architects and for technical staff. The unadjusted, 'as reported', figures are presented in table 3-6.

TABLE 3-5
Average hourly charge-out rates ADJUSTED to take account of Purchasing Power Parity (PPP)

€	average (median) hourly charge-out rates ADJUSTED to take account of Purchasing Power Parities (PPP), Euros		
	principals	architects	technologists
Austria	84	75	58
Belgium	59	55	46
Bulgaria*	42	34	29
Croatia	43	35	19
Czech Republic*	n/a	n/a	n/a
Denmark	86	77	62
Estonia*	50	44	n/a
Finland	69	63	46
France	82	69	46
Germany	74	64	49
Greece	17	11	9
Ireland	64	53	42
Italy	39	36	29
Latvia*	39	40	13
Luxembourg	89	70	49
Malta*	65	47	38
Netherlands*	70	63	48
Portugal	35	29	17
Romania	16	11	6
Slovakia	25	21	14
Slovenia*	42	19	30
Spain	42	38	18
Sweden	77	68	60
Switzerland	74	68	55
Turkey	23	13	6
United Kingdom	81	75	54
2014 EUROPE-26	64	53	43
2012 EUROPE-25	54	44	29
2010 EUROPE-23	66	56	43
2008 EUROPE-17	62	50	39

Data is expressed in Euros but each country's figure has been adjusted using an index of Purchasing Power Parity (PPP). This index takes account of price level differences across countries. We have used an index sourced from Eurostat, whose Comparative Price Level Indices assess the price level of each country in the comparison of European countries. Each country's average hourly rates figure is divided by one hundredth of the country's index value to create the PPP adjusted figure.

* caution - small sample Netherlands: BNA Benchmark Research 2014

TABLE 3-6

Average hourly charge-out rates, unadjusted

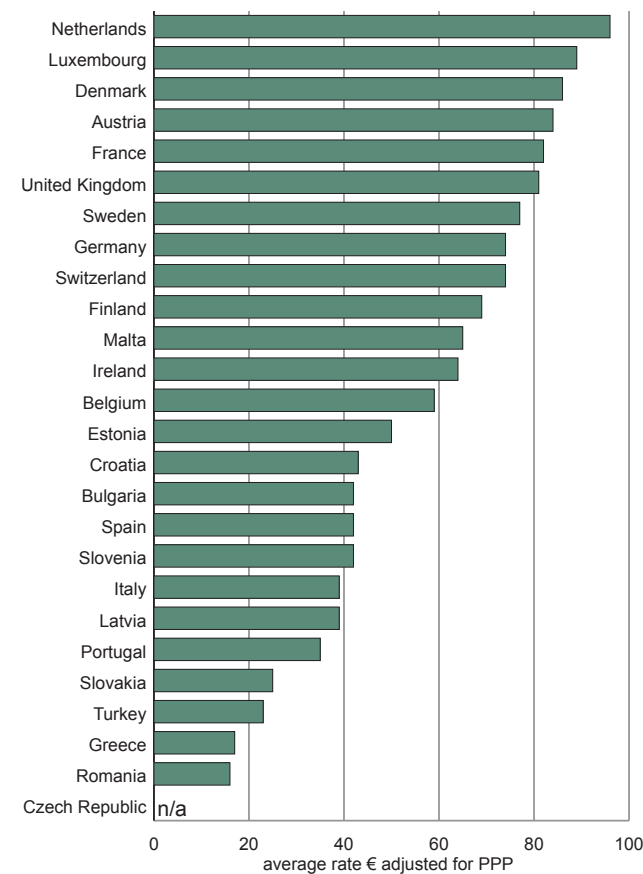
€	average (median) hourly charge-out rates, Euros		
	principals	architects	technologists
Austria	90	80	63
Belgium	65	60	50
Bulgaria*	20	17	14
Croatia	30	24	13
Czech Republic*	n/a	n/a	n/a
Denmark	121	107	87
Estonia*	40	35	26
Finland	85	75	57
France	87	75	50
Germany	75	65	50
Greece	15	10	8
Ireland	75	63	50
Italy	40	37	30
Latvia*	28	29	9
Luxembourg	110	86	60
Malta*	52	35	28
Netherlands*	96	84	63
Portugal	30	25	15
Romania	9	6	3
Slovakia	18	15	10
Slovenia*	35	16	25
Spain	40	36	17
Sweden	100	89	78
Switzerland	115	107	86
Turkey	17	8	4
United Kingdom	97	85	61
2014 EUROPE-26	67	55	45
2012 EUROPE-25	55	43	30
2010 EUROPE-23	75	63	50
2008 EUROPE-17	63	50	40

* caution - small sample

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CHART 3-7

Average hourly charge-out rates for Principals, adjusted for Purchasing Power Parity (PPP)



3.6 Practice Profits

Profits are expressed here as a percentage of revenue. In a one-person practice, profits account for 60 per cent of revenue. This falls in line with practice size, so a practice of 3 to 5 staff records an average profit of 44 per cent, falling further to 22 per cent in the largest practices.

There may be variations in the definition of 'profits' so inter-country comparisons should be considered with caution.

Profits as a percentage of revenue appear to have increased in all but one of the practice sizes analysed, compared with the last survey in 2012. And in 2012 average profits as a percent of revenue had increased since the previous survey - so the trend is clearly up.

CHART 3-8
Practice profits analysed by practice size

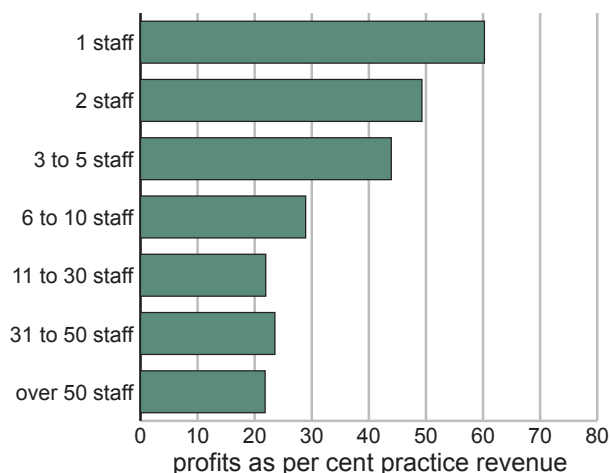


TABLE 3-7
Average pre-tax profits as a percentage of total revenue, analysed by country and practice size

per cent	size of architectural practice (number of architectural staff)						
	1 staff	2 staff	3 to 5 staff	6 to 10 staff	11 to 30 staff	31 to 50 staff	over 50 staff
Austria	48	52	28	17	26	n/a	n/a
Belgium	51	37	32	21	16	13	18
Bulgaria*	62	39	50	35	38	n/a	n/a
Croatia	33	n/a	16	n/a	n/a	n/a	n/a
Czech Republic*	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Denmark	70	64	15	n/a	15	7	27
Estonia*	n/a	n/a	n/a	24	n/a	n/a	n/a
Finland	39	32	21	19	14	11	n/a
France	43	21	27	14	12	20	n/a
Germany	59	54	38	30	18	29	n/a
Greece	56	45	46	n/a	n/a	n/a	n/a
Ireland	56	52	24	n/a	n/a	n/a	n/a
Italy	65	60	59	55	49	62	74
Latvia*	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg	58	51	27	9	n/a	n/a	n/a
Malta*	66	81	50	n/a	n/a	n/a	n/a
Netherlands*	25	15	12	11	5	11	11
Portugal	60	52	39	26	42	n/a	n/a
Romania	53	48	35	38	15	n/a	n/a
Slovakia	42	37	36	43	0	n/a	n/a
Slovenia*	37	n/a	n/a	n/a	n/a	n/a	n/a
Spain	53	49	49	46	57	n/a	n/a
Sweden	48	27	19	10	9	11	n/a
Switzerland	49	27	20	8	13	11	8
Turkey	54	66	38	38	30	40	n/a
United Kingdom	65	48	30	20	25	24	20
2014 EUR-26	60	49	44	29	22	24	22
2012 EUR-25	56	44	39	29	23	18	19
2010 EUR-23	45	34	29	22	20	13	15
2008 EUR17	52	44	40	31	26	17	26

* caution - small sample

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3.7 Revenue from outside own country

About 6 per cent of practice revenues are generated from work undertaken outside the country in which the architectural practice is based. This proportion is estimated to be highest in Turkey (26 per cent) and also high in Slovenia, Portugal and Greece (between 14 and 19 per cent). The proportion of revenue earned from outside the practice's country is similar to that recorded in previous surveys.

New for this year, we have asked respondents to distinguish between Europe and the rest of the world. About 58 per cent of revenue from outside the practice's own country comes from work in another European country, while about 42 per cent comes from outside Europe. The highest proportion of total practice revenue derived from outside Europe is recorded by architects in Turkey and Portugal - over 10 per cent of total revenue in both countries.

CHART 3-9
Source of revenue

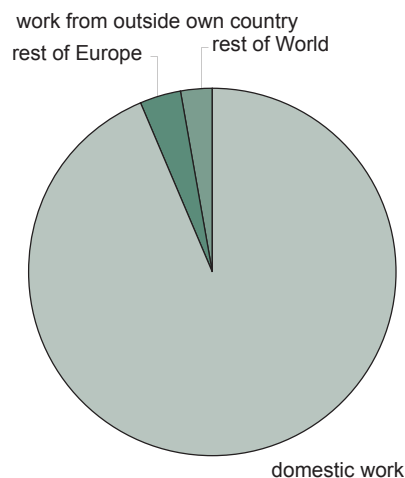


TABLE 3-8
Proportion of practice revenue derived from outside the country, analysed by country

per cent	turnover derived from outside the country		
	revenue from rest of Europe	revenue from outside Europe	TOTAL
Austria	8.3	1.2	9.5
Belgium	4.6	1.1	5.7
Bulgaria*	0.4	0.8	1.2
Croatia	2.6	9.4	12.0
Czech Republic*	n/a	n/a	3.9
Denmark	7.3	4.0	11.3
Estonia*	8.4	1.3	9.6
Finland	2.5	2.5	4.9
France	1.5	0.6	2.1
Germany	9.1	1.1	10.2
Greece	9.5	4.2	13.7
Ireland	6.8	0.9	7.7
Italy	2.3	2.0	4.2
Latvia*	1.6	4.0	5.6
Luxembourg	11.5	0.1	11.6
Malta*	0.0	0.0	0.0
Netherlands*	3.0	1.0	4.0
Portugal	6.7	12.6	19.2
Romania	2.5	3.2	5.8
Slovakia	4.8	0.9	5.7
Slovenia*	13.7	5.3	19.0
Spain	3.8	4.9	8.7
Sweden	2.6	1.3	3.9
Switzerland	3.6	2.3	5.9
Turkey	9.1	16.7	25.9
United Kingdom	3.9	5.4	9.3
2014 EUROPE-26	3.7	2.7	6.4
2012 EUROPE-25	n/a	n/a	5.6
2010 EUROPE-23	n/a	n/a	7.7
2008 EUROPE-17	n/a	n/a	6.0

data is based on incomplete responses to this question and should be considered with caution
* caution - small sample Netherlands: BNA Benchmark Research 2014

3.8 Associations

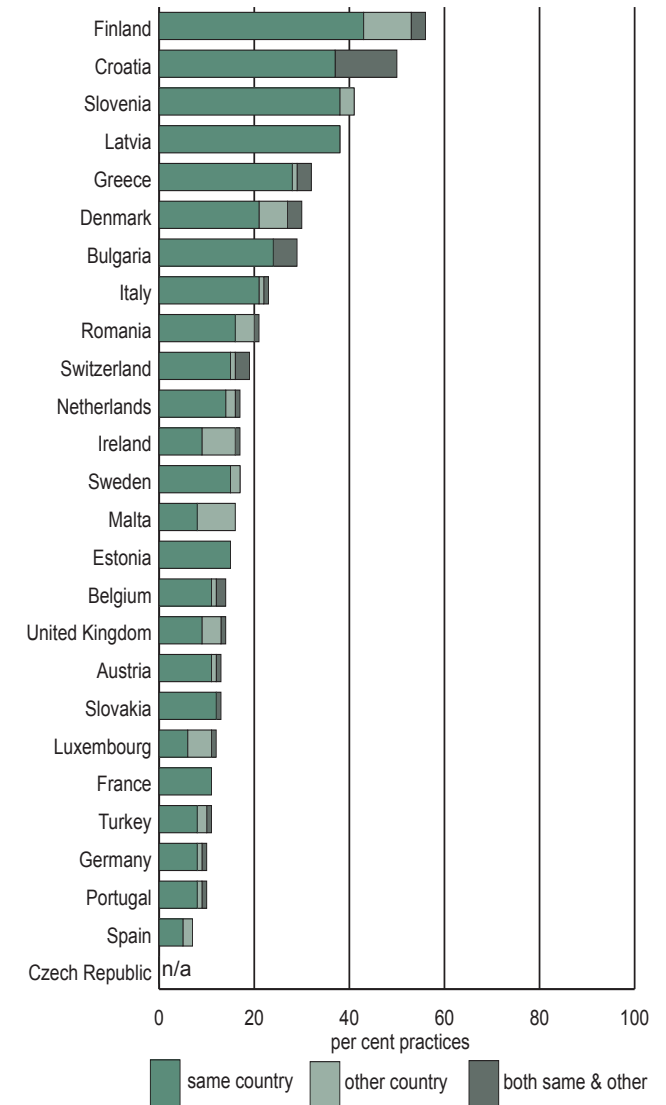
TABLE 3-9
Proportion of practices who have a formal association with another practice

per cent	no formal association	have a formal association		
		with architect / practice in same country	with architect / practice in another country	both
Austria	87	11	1	1
Belgium	86	11	1	2
Bulgaria*	71	24	0	5
Croatia	50	37	0	13
Czech Republic*	n/a	n/a	n/a	n/a
Denmark	70	21	6	3
Estonia*	85	15	0	0
Finland	44	43	10	3
France	89	11	0	0
Germany	90	8	1	1
Greece	67	28	1	3
Ireland	83	9	7	1
Italy	77	21	1	1
Latvia*	63	38	0	0
Luxembourg	88	6	5	1
Malta*	83	8	8	0
Netherlands*	83	14	2	1
Portugal	89	8	1	1
Romania	79	16	4	1
Slovakia	88	12	0	1
Slovenia*	59	38	3	0
Spain	93	5	2	0
Sweden	83	15	2	0
Switzerland	81	15	1	3
Turkey	89	8	2	1
United Kingdom	87	9	4	1
2014 EUROPE-26	84	14	2	1
2012 EUROPE-25	79	18	2	1
2010 EUROPE-23	82	15	2	2
2008 EUROPE-17	85	12	3	n/a

* caution - small sample

Netherlands: BNA Benchmark Research 2014

CHART 3-10 Proportion of practices who have a formal association with another practice



3.8 Associations

Seventeen per cent of practices have a formal association with another practice. For most, this is an association with another practice in the same country. The highest level of formal associations can be found in Finland and Croatia - where at least half of practices are associated with another practice. Slightly fewer practices have a formal association in this year's survey compared with the 2012 survey, although the proportion is similar to that recorded in 2008.

3.9 Branch Offices

Working in a branch or subsidiary office provides information as to how many offices an architectural practice might have. Overall, few architects (6 per cent) work in a branch office. But this proportion is over 15 per cent in Turkey, the United Kingdom, Estonia and Latvia (but small sample sizes in these last two). Where architects do work in a branch office, the head office is nearly always located in the same country as the branch office and the same country as where the architect is registered (96 per cent for both). The survey figures are very similar to those recorded in 2012.

TABLE 3-10
Proportion of architects working in branch office and location of branch office's Head Office

per cent	work in branch office	head office is located in...	
		same country as where branch office is located	same country as where architect is registered
Austria	4	93	96
Belgium	5	95	95
Bulgaria*	1	93	96
Croatia	7	89	89
Czech Republic*	8	n/a	n/a
Denmark	12	92	91
Estonia*	15	0	0
Finland	7	84	84
France	2	96	97
Germany	5	96	96
Greece	5	94	93
Ireland	5	82	85
Italy	3	99	99
Latvia*	15	88	100
Luxembourg	4	75	73
Malta*	0	100	90
Netherlands*	5	95	95
Portugal	9	94	89
Romania	7	95	95
Slovakia	7	n/a	n/a
Slovenia*	6	100	92
Spain	4	50	50
Sweden	11	69	59
Switzerland	2	74	89
Turkey	17	91	91
United Kingdom	15	95	96
2014 EUROPE-26	6	96	96
2012 EUROPE-25	6	90	91
2010 EUROPE-23	12	89	98
2008 EUROPE-17	9	71	93

* caution - small sample Netherlands: BNA Benchmark Research 2014 n/a = respondent did not answer this part of the question

3.10 Competitive Tenders

In a new question this year, thirty six per cent of responding Principals say their practice has submitted a competitive tender in the last 12 months. More (28 per cent of all practices) have submitted a competitive tender to a public sector client, than to a private sector one (19 per cent). Countries with the highest submission of public sector tenders include Switzerland, Finland and France (plus other countries with small sample sizes). Practices in Finland, Croatia and Greece submit more competitive tenders to private sector clients than elsewhere. Countries where practices are least likely to submit competitive tenders include Portugal, Italy, Turkey and Germany.

On average, architectural practices each submitted 5.4 competitive tenders in the last 12 months. This average includes practices which submitted no tenders so therefore the average number of tenders submitted by practices who submitted at least one tender, rises to 15. Half of all competitive tenders submitted were for a Pre-Qualification questionnaire or Expression of Interest (for either public or private sector clients).

TABLE 3-11 Practices submitting competitive tenders, last 12 months, analysed by country

per cent practices	submitted 1+ tender	1+ tender to public sector	1+ tender to private sector
Austria	53	46	27
Belgium	43	33	27
Bulgaria*	38	32	17
Croatia	57	43	47
Czech Republic*	n/a	n/a	n/a
Denmark	49	44	27
Estonia*	93	64	93
Finland	70	54	57
France	62	54	27
Germany	31	25	13
Greece	45	16	42
Ireland	53	44	38
Italy	26	22	9
Latvia*	61	56	28
Luxembourg	36	30	16
Malta*	40	40	16
Netherlands*	80	65	40
Portugal	22	13	16
Romania	33	24	18
Slovakia	57	39	39
Slovenia*	50	44	28
Spain	40	28	22
Sweden	52	41	35
Switzerland	70	63	38
Turkey	30	17	23
United Kingdom	48	32	36
2014 EUROPE-26	36	28	19
2012 EUROPE-25	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a

CHART 3-11 Practices submitting competitive tenders

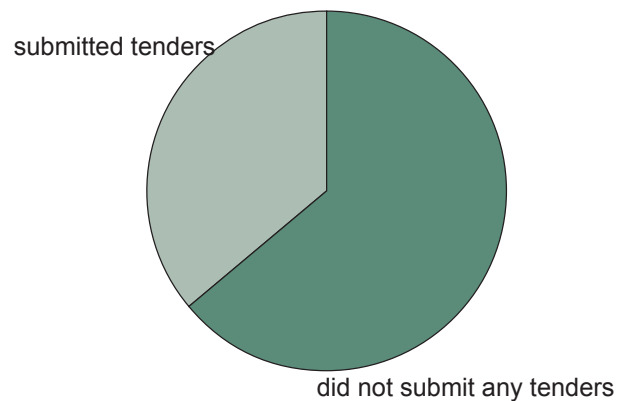
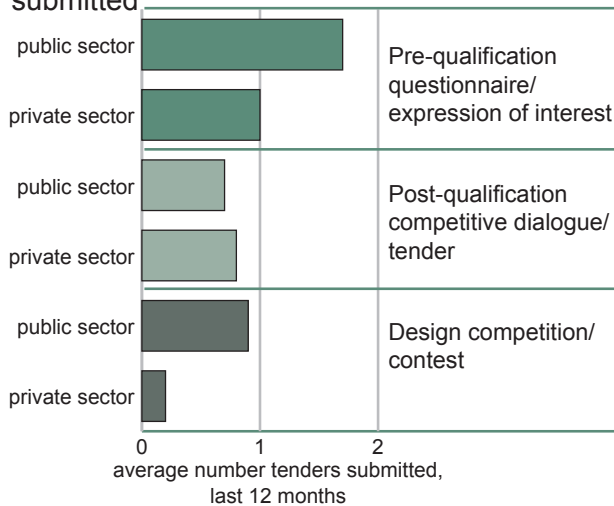


CHART 3-12 Average number of competitive tenders submitted



* caution - small sample Research 2014

Netherlands: BNA Benchmark

TABLE 3-12

Average number of competitive tenders submitted, last 12 months, analysed by country

average (mean) number of tenders made per practice	Pre-qualification questionnaire / expression of interest		Post-qualification competitive dialogue / tender		Design competition / contest		ALL tenders
	public sector	private sector	public sector	private sector	public sector	private sector	
Austria	1.0	0.3	0.2	0.2	1.6	0.8	4.1
Belgium	1.7	2.3	0.4	1.1	1.3	0.3	7.0
Bulgaria*	0.3	0.2	2.6	0.0	0.3	0.2	3.6
Croatia	3.2	4.4	0.1	0.7	0.4	0.3	9.1
Czech Republic*	0.9	5.7	2.3	5.4	0.8	0.0	15.1
Denmark	10.3	2.7	2.7	0.9	3.0	0.6	20.1
Estonia*	7.4	5.3	3.9	13.1	1.1	0.6	31.5
Finland	5.2	1.3	2.7	5.0	0.8	0.4	15.4
France	10.8	1.8	3.2	0.8	3.8	0.4	20.8
Germany	0.6	0.1	0.3	0.1	0.8	0.2	2.0
Greece	0.1	2.4	0.1	6.0	0.1	0.3	9.1
Ireland	3.6	1.7	1.7	1.7	0.4	0.2	9.3
Italy	0.9	0.2	0.3	0.1	0.7	0.2	2.4
Latvia*	2.5	2.3	0.9	0.7	1.1	0.3	7.7
Luxembourg	0.9	0.3	0.1	0.1	0.7	0.3	2.4
Malta*	1.1	0.2	1.0	0.1	0.3	0.0	2.7
Netherlands*	2.4	1.5	1.0	2.3	0.6	0.2	7.0
Portugal	0.2	0.5	0.1	0.3	0.2	0.3	1.6
Romania	0.8	0.3	0.9	0.4	0.8	0.2	3.5
Slovakia	1.3	2.0	0.9	0.6	0.6	0.5	5.9
Slovenia*	5.4	3.9	0.6	1.1	0.4	0.3	11.7
Spain	0.8	1.2	0.6	0.8	0.6	0.3	4.4
Sweden	4.2	3.0	0.7	1.0	0.6	0.4	10.0
Switzerland	2.9	1.1	0.4	0.5	2.9	1.0	8.8
Turkey	1.0	1.9	0.4	0.7	0.1	0.2	4.3
United Kingdom	2.5	1.8	1.1	2.9	0.5	0.3	9.0
2014 EUROPE-26	1.7	1.0	0.7	0.8	0.9	0.2	5.4
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a	n/a	n/a

* caution - small sample Netherlands: BNA Benchmark Research 2014
 2008/10/12 question was not asked in previous surveys

3.11 Certification Work

TABLE 3-13
Architectural practices who offer certification services, analysed by country

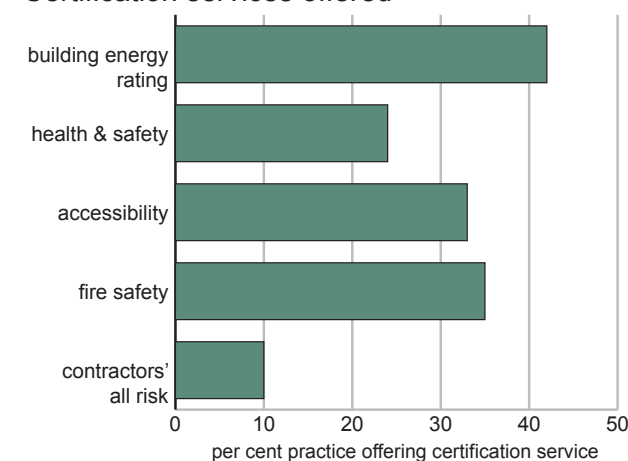
per cent of practices who offer service	type of certification offered				
	building energy rating	health & safety	accessibility	fire safety	contractors' all risk
Austria	36	6	18	21	9
Belgium	36	18	18	26	11
Bulgaria*	29	29	36	55	0
Croatia	56	8	20	20	0
Czech Republic*	33	0	n/a	n/a	n/a
Denmark	31	21	27	29	20
Estonia*	33	13	0	0	0
Finland	9	18	37	29	0
France	20	9	42	28	11
Germany	23	11	10	19	0
Greece	64	40	36	58	100
Ireland	22	48	64	67	0
Italy	61	33	41	41	3
Latvia*	18	18	25	33	n/a
Luxembourg	61	10	8	25	n/a
Malta*	53	0	40	0	100
Netherlands*	80	85	80	10	5
Portugal	12	16	47	36	15
Romania	33	28	31	46	17
Slovakia	41	6	11	41	0
Slovenia*	45	31	0	25	n/a
Spain	89	51	75	62	0
Sweden	14	13	50	9	8
Switzerland	16	2	8	11	0
Turkey	51	35	32	57	38
United Kingdom	5	9	4	0	0
2014 EUROPE-26	42	24	33	35	10
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a

* caution - small sample

Netherlands: BNA Benchmark Research 2014

In a new question for 2014, respondents stated whether their practice offers any of a variety of certification services. Most common is the building energy rating certificate, which is offered by 42 per cent of practices. This is offered by more than 60 per cent of practices in Spain, Greece and Italy. About one third of practices offer fire safety certification (35 per cent of all, including over 50 per cent in Ireland, Spain, Turkey and Greece) and accessibility certification (33 per cent, offered by more than 50 per cent of practices in Spain, Ireland and Sweden). A quarter (24 per cent) of practices offer health and safety certification (highest levels in Spain and Ireland) while just 10 per cent offer a contractors' all risk certificate (including all practices in Greece and 38 per cent of practices in Turkey). Very low levels of practices offer any of the five certification services in Switzerland and the United Kingdom.

CHART 3-13
Certification services offered



4 Architects - the Individual



4.1 Earnings

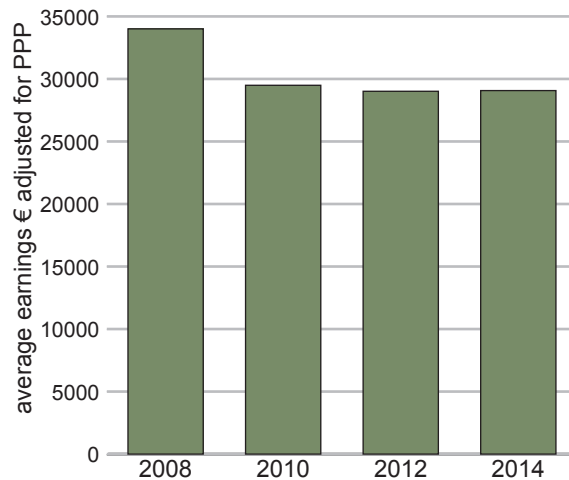
The average earnings figure for Europe is almost identical in 2014 to that of 2012. Architects' earnings record an average (adjusted for PPP) of €29 070 before tax.

The rate of decline in earnings seen between 2008 and 2010 eased considerably between 2010 and 2012. Although the direction was still downwards, the rate of decline was much slower. These latest figures for 2014 suggest that earnings have stabilised at 2012 levels.

This is the Europe-wide pattern; different countries show different trends. Between the 2012 and 2014 surveys average earnings have fallen the most in Turkey, the United Kingdom and Germany; while the highest rises are recorded by architects in Spain and Italy, but from a lower base.

CHART 4-1

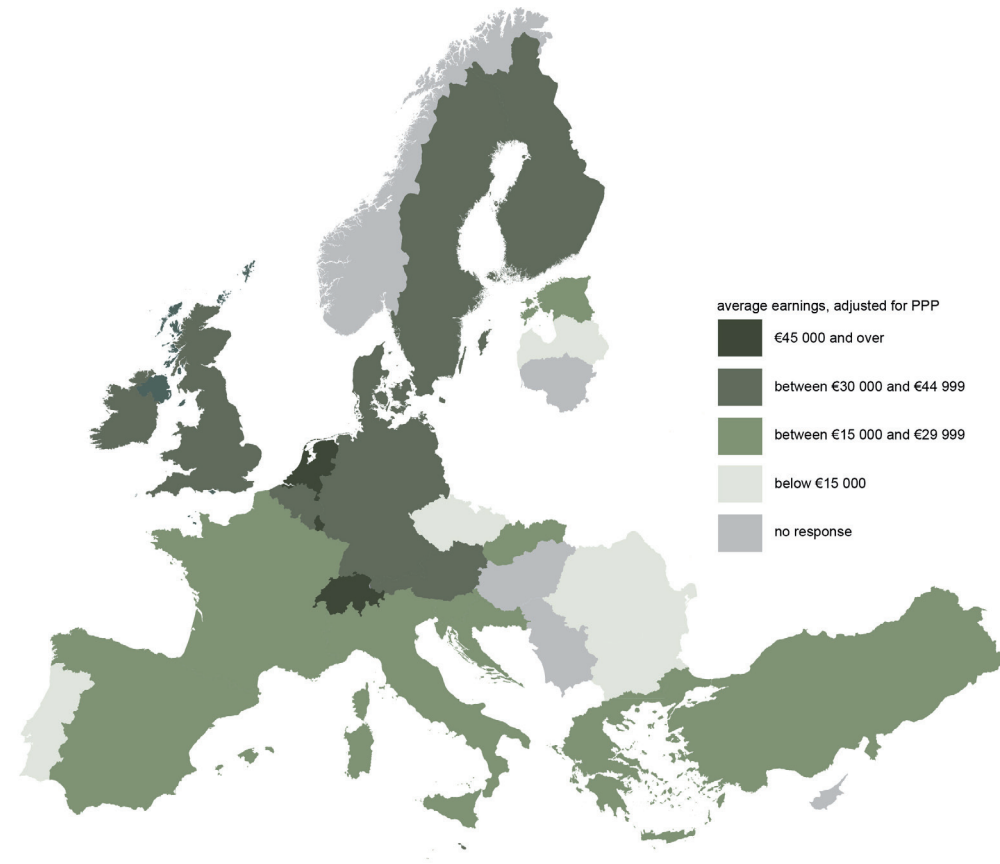
Change in architects' average earnings (all survey countries), 2008-14



The adjustment of average earnings for PPP takes account of differing price levels in the 26 surveyed countries, adjusting each country's average earnings figure by its purchasing power parity (PPP) index.

CHART 4-2

Range of average earnings (all full-time architects), adjusted for PPP



These adjusted figures show average earnings are highest in Switzerland, Luxembourg, Germany, Denmark and Austria. Average adjusted earnings are lowest in Bulgaria, Romania and Latvia.

TABLE 4-1

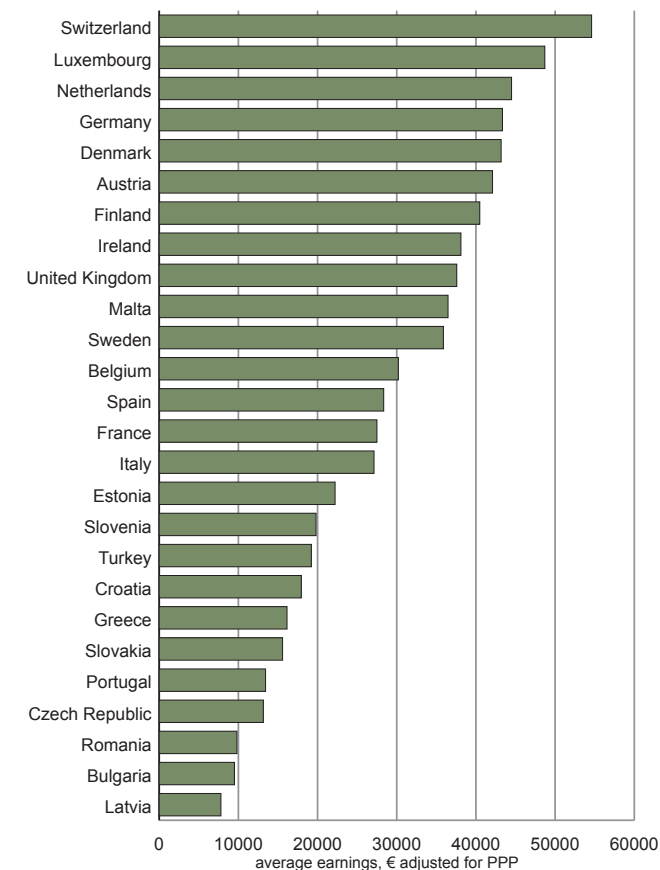
Average earnings of full-time Architects analysed by country

€	average earnings 2014		average earnings adjusted for PPP		
	adjusted for PPP	unadjusted for PPP	2012	2010	2008
Austria	42 095	45 000	42 174	38 925	47 337
Belgium	30 192	33 000	28 354	28 384	28 222
Bulgaria*	9 506	4 601	12 030	14 555	n/a
Croatia	17 946	12 293	18 078	18 892	n/a
Czech Republic*	13 150	9 284	19 410	21 268	n/a
Denmark	43 187	60 289	42 543	37 843	39 012
Estonia*	22 215	17 750	12 776	15 318	36 084
Finland	40 486	50 000	38 339	35 601	32 327
France	27 498	30 000	27 326	28 871	33 241
Germany	43 350	45 000	46 422	39 932	38 797
Greece	16 145	14 450	18 927	20 534	26 846
Ireland	38 103	45 000	36 847	40 200	52 209
Italy	27 132	28 000	24 248	18 779	n/a
Latvia*	7 795	5 550	n/a	n/a	n/a
Luxembourg	48 701	60 000	46 267	n/a	44 484
Malta*	36 478	30 000	32 051	n/a	34 447
Netherlands*	44 500	49 000	n/a	n/a	n/a
Portugal	13 433	11 900	13 714	n/a	n/a
Romania	9 822	5 648	10 844	8 172	22 748
Slovakia	15 581	11 000	n/a	16,378	n/a
Slovenia*	19 808	16 500	17 964	29 240	31 491
Spain	28 354	28 000	20 534	n/a	n/a
Sweden	35 890	46 585	35 649	36 612	29 990
Switzerland	54 608	83 904	n/a	n/a	n/a
Turkey	19 213	12 335	24 902	21 432	20 486
United Kingdom	37 582	48 749	48 242	45 922	45 014
2014 EUROPE-26** (25 in 2012, 23 in 2010 and 17 in 2008)	29 070	30 000	29 014	29 493	34 003

* caution - small sample Netherlands: BNA Benchmark Research 2014 ** 2014 EUROPE-26 'unadjusted' figure is a weighted average and takes account of the number of architects in each participating country. The ALL Europe figure is not weighted.

CHART 4-3

Average earnings, all full-time architects, ADJUSTED for Purchasing Power Parity (PPP)



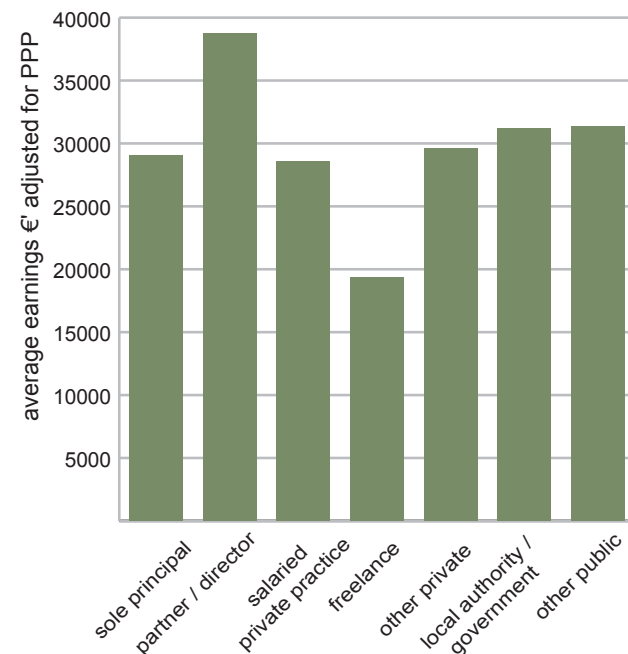
4.2 Earnings by Field of Employment

TABLE 4-2
Average earnings analysed by country and field of employment (adjusted for PPP)

€	sole principal	partner/director	ALL Principals	private practice salaried	freelance	other private	ALL private	local / central gov't	other public	ALL public
Austria	42 095	48 831	42 095	41 066	29 467	n/a	42 095	n/a	n/a	n/a
Belgium	32 022	41 171	35 682	32 479	25 618	27 447	29 277	29 277	37 420	36 597
Bulgaria*	21 125	7 183	11 619	7 149	15 844	n/a	9 506	10 985	n/a	10 985
Croatia	23 033	17 946	18 426	16 123	n/a	n/a	17 275	21 178	n/a	20 730
Czech Republic*	n/a	n/a	n/a	6 962	n/a	n/a	12 892	n/a	n/a	n/a
Denmark	38 388	57 583	50 673	38 580	49 089	46 066	43 187	40 308	46 066	42 707
Estonia*	44 431	16 270	35 044	22 215	n/a	n/a	25 031	n/a	n/a	n/a
Finland	40 081	65 844	43 198	37 045	n/a	41 296	40 486	41 093	42 105	41 700
France	27 498	41 247	27 498	27 498	20 599	27 956	27 498	37 122	38 524	37 149
Germany	53 202	68 966	59 113	35 468	66 010	55 194	41 379	52 217	54 187	52 956
Greece	13 408	33 520	14 525	14 749	11 173	15 084	14 608	24 134	21 587	23 061
Ireland	29 636	38 103	30 483	36 410	19 052	n/a	33 870	57 197	59 272	58 002
Italy	29 070	34 884	29 070	26 453	19 380	25 194	27 326	29 070	25 194	27 132
Latvia*	26 966	6 004	9 965	4 705	n/a	8 427	8 006	1 489	n/a	n/a
Luxembourg	45 455	56 818	48 701	38 961	46 266	48 701	48 701	n/a	n/a	n/a
Malta*	31 447	72 327	37 736	27 358	50 314	36 478	33 287	34 591	50 314	38 994
Netherlands*	36 300	63 600	50 000	36 300	45 400	43 200	40 900	40 900	50 000	43 100
Portugal	14 343	16 453	16 279	10 523	12 694	12 791	12 558	19 558	19 070	19 558
Romania	12 502	11 787	11 787	4 000	n/a	6 286	9 822	n/a	12 180	7 858
Slovakia	14 164	15 742	14 164	18 414	14 062	27 995	15 581	17 928	14 164	16 613
Slovenia*	28 812	17 287	18 607	15 846	24 010	n/a	18 607	n/a	n/a	n/a
Spain	31 646	25 316	26 371	31 646	21 097	25 316	26 371	42 514	37 975	42 141
Sweden	42 298	53 407	49 562	34 864	n/a	43 016	42 469	47 033	42 726	46 998
Switzerland	57 842	63 100	63 100	44 433	37 860	57 842	52 583	71 513	n/a	71 513
Turkey	40 561	50 701	45 364	14 410	21 081	19 213	19 213	23 056	17 879	19 854
United Kingdom	32 213	53 688	42 951	38 656	n/a	67 647	41 609	45 098	48 320	47 783
2014 EUR-26	29 070	38 760	31 977	28 571	19 380	29 636	29 070	31 159	31 372	31 224
2012 EUR-25	29 098	39 767	29 098	28 167	19 399	29 098	28 487	32 004	29 098	30 807
2010 EUR-23	30 144	40 000	33 364	27 556	25 416	32 517	29 852	34 223	27 556	31 957
2008 EUR-17	37 895	43 605	38 952	30 182	29 070	43 605	34 597	33 915	26 964	32 131

* caution - small sample Netherlands: BNA Benchmark Research 2014
Earnings data converted from local currencies to Euros, exchange rate as at 01.05.14 and then adjusted for PPP

CHART 4-4
Earnings by field of employment (adjusted for PPP)



Highest average earnings are recorded by Partners / Directors (€38 760 adjusted for PPP). Their pay is clearly ahead of that of any other field of employment in the majority of countries.

The closest rival to Partners/Directors' earnings come from the public sector. The figures suggest there is overall very little difference in the pay between local/central government and other parts of the public sector. In some countries, such as Ireland and Spain (and also Bulgaria, but small sample) architects working in the public

sector report average earnings at least 50 per cent higher than Partners/Directors. While in Switzerland, Portugal and Croatia, public sector architects' average earnings are also higher than those of Partners/Directors, but by less - around 10 to 15 per cent.

Elsewhere within private practice, the greatest difference between average earnings of Partners/Directors and salaried staff is recorded in Turkey and Romania. Here, salaried architects receive about one third the earnings of Principals. Denmark and Luxembourg emerge as having relatively high average salaries amongst Freelance architects, compared with other fields of employment. In nearly all countries, Sole Principals earn more than salaried architects in private practice. Sole Principals in Greece, Ireland and the United Kingdom are notable exceptions.

Compared with the 2012 survey, average earnings are unchanged for Sole Principals, but have fallen slightly, by 2.5 per cent, for Partners/Directors. By contrast, the average earnings recorded by private practice salaried staff have increase slightly, by 1.4 per cent. Average salaries reported by freelance architects are unchanged. Architects working in the public sector report a rise of 1.4 per cent although this masks a larger rise amongst 'other public' sectors but a fall amongst architects working for local or central government.

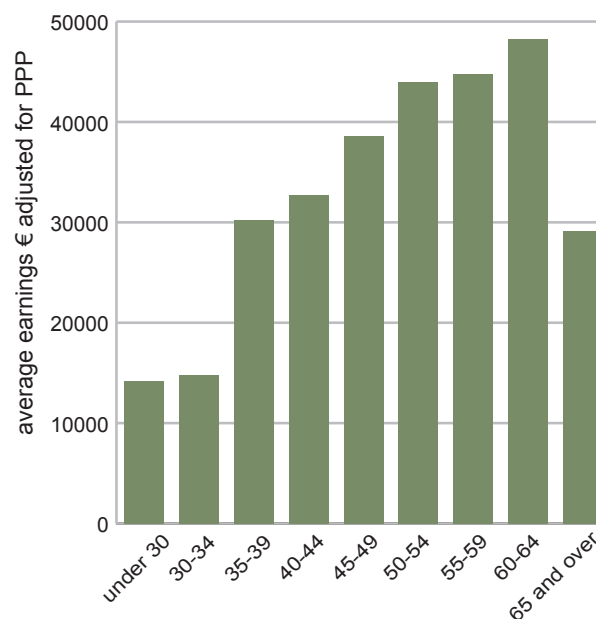
Architects' average earnings rise in line with age, peaking at age 60 to 64. The rise to the peak value is consistent for each five year age

4.3 Earnings by Age

TABLE 4-3
Average earnings analysed by age (adjusted for PPP)

€	2014			2012 EUROPE-25 MEDIAN	2010 EUROPE-23 MEDIAN	2008 EUROPE-17 MEDIAN
	lower quartile	MEDIAN	upper quartile			
<30	7 505	14 241	27 690	14 549	15 615	17 041
30-34	6 344	14 763	24 380	19 399	24 550	29 214
35-39	15 081	30 189	47 451	24 902	30 075	34 677
40-44	18 269	32 704	51 329	29 098	33 364	38 760
45-49	21 384	38 611	62 893	33 800	33 364	39 729
50-54	25 157	44 025	72 502	36 081	34 317	42 391
55-59	22 642	44 824	72 502	38 797	35 119	43 647
60-64	22 026	48 264	75 472	41 370	40 875	41 890
65+	14 535	29 151	50 248	37 354	36 095	n/a

CHART 4-5
Average earnings by age (adjusted for PPP)



group - a repeat of the pattern seen in 2012. More noticeable this year however is the jump at age 35, where average earnings appear to double between age 30-34 and 35-39.

The peak earning age continues to be age 60-64. This was the case in 2012 and 2010, although in 2008 the peak occurred at age 55-59. Compared with the 2012 survey, average earnings have improved amongst architects aged 35 upwards, while they are lower than in 2012 for architects aged under 35. Falling average earnings for architects under 35 has been the pattern now since the first survey in 2008. For architects aged 35 to 44, average earnings in 2014 have improved to reach 2010 levels; while for older architects their average earnings are returning to the same levels recorded in the 2008 survey. In all cases, figures quoted are based on data which has been adjusted for PPP.

4.4 Earnings by Gender

As in previous surveys, a considerable differential remains between the average earnings of male and female architects. This year's survey shows full-time male architects earn 33 per cent more than full-time women; for part-time architects, men earn 27 per cent more than women. But the trend shows this differential - although still significant - is in decline. In the 2012 survey full-time men earned 43 per cent more than women, 47 per cent more in 2010 and 46 per cent more in 2008.

The part-time average earnings figures have been grossed up to represent full-time equivalence (FTE). For both men and women, average part-time earnings are lower than full-time. For male architects, part-timers earn 7 per cent less than their full-time colleagues, while for women there is almost parity: part-time architects earn just 2 per cent less than those working full-time.

CHART 4-6
Average earnings of male and female Architects, working full-time (adjusted for PPP)

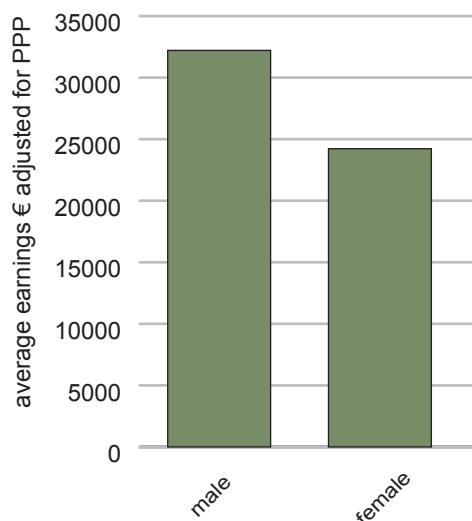


CHART 4-7
Change in male / female architects' average earnings (all survey countries), 2008-14

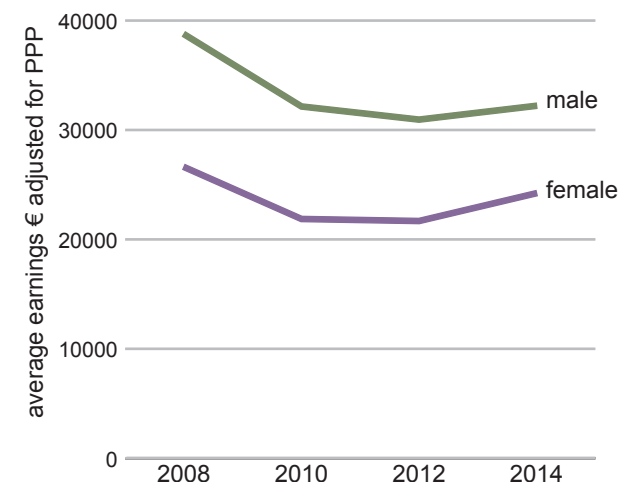


TABLE 4-4
Average earnings analysed by gender and full-time or part-time working (adjusted for PPP)

€		2014			2012 EUROPE-26 MEDIAN	2010 EUROPE-23 MEDIAN	2008 EUROPE-17 MEDIAN
		lower quartile	MEDIAN	upper quartile			
Full time	male	17 442	32 213	50 865	30 948	32 149	38 760
	female	9 690	24 225	38 424	21 680	21 866	26 620
Part time FTE*	male	15 141	30 105	49 777	34 099	37 936	30 431
	female	12 716	23 750	37 367	24 137	25 862	24 225

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

4.5 Working in another European country

This question area has been newly expanded for 2014. In previous years, we obtained an estimate of the level of architects working in another country, by comparing the country in which respondents are registered with where their current office is. This showed that around 3 per cent were working in a different country from the one in which they were registered (2.3 per cent in 2014).

This year's new question asks directly whether the respondent has worked in another country in the last 12 months. The findings show that overall 5 per cent of respondents have done so, including more than 10 per cent of architects in Luxembourg, Austria, and Ireland.

On average, most of the architects who have worked in another European country in the last 12 months have worked in just one country for either short periods or longer periods of time.

TABLE 4-5
Proportion of architects working in a different country from where registered

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

* caution - small sample Netherlands: BNA Benchmark Research 2014 n/a = question not asked

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

TABLE 4-6
Proportion of architects who have worked in another European country in the last 12 months

per cent / number	architects who have worked in another European country in last 12 months (%)	of whom: number of countries working in for...		have seriously considered working in another country, last 12 months (%)	architects part/wholly educated in different country from the one in which principally established (%)
		short periods (up to 16 weeks)	longer periods (>16 weeks) or on-going work		
Austria	15	1.8	1.8	23	21
Belgium	10	1.1	1.2	15	20
Bulgaria*	4	2.0	0.0	23	15
Croatia	4	1.7	1.0	50	28
Czech Republic*	8	n/a	1.0	38	23
Denmark	7	1.3	1.0	18	26
Estonia*	10	1.0	n/a	15	25
Finland	2	1.2	0.0	15	23
France	3	1.1	0.7	14	19
Germany	7	1.2	0.9	19	23
Greece	4	2.0	1.6	57	54
Ireland	13	1.6	0.8	28	37
Italy	3	1.3	1.0	45	10
Latvia*	6	n/a	2.0	24	17
Luxembourg	29	1.1	1.2	32	90
Malta*	0	n/a	n/a	27	35
Netherlands*	7	1.5	1.2	25	20
Portugal	6	0.9	0.5	55	26
Romania	3	0.7	0.5	34	19
Slovakia	9	1.1	0.9	31	19
Slovenia*	15	0.8	1.0	33	25
Spain	4	1.6	1.2	46	18
Sweden	6	1.0	0.5	34	34
Switzerland	10	1.1	1.0	13	31
Turkey	3	1.3	1.7	42	17
United Kingdom	8	1.4	1.1	20	16
2014 EUROPE-26**	5	1.3	1.0	35	18
2012 EUROPE-25**	n/a	n/a	n/a	35	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a

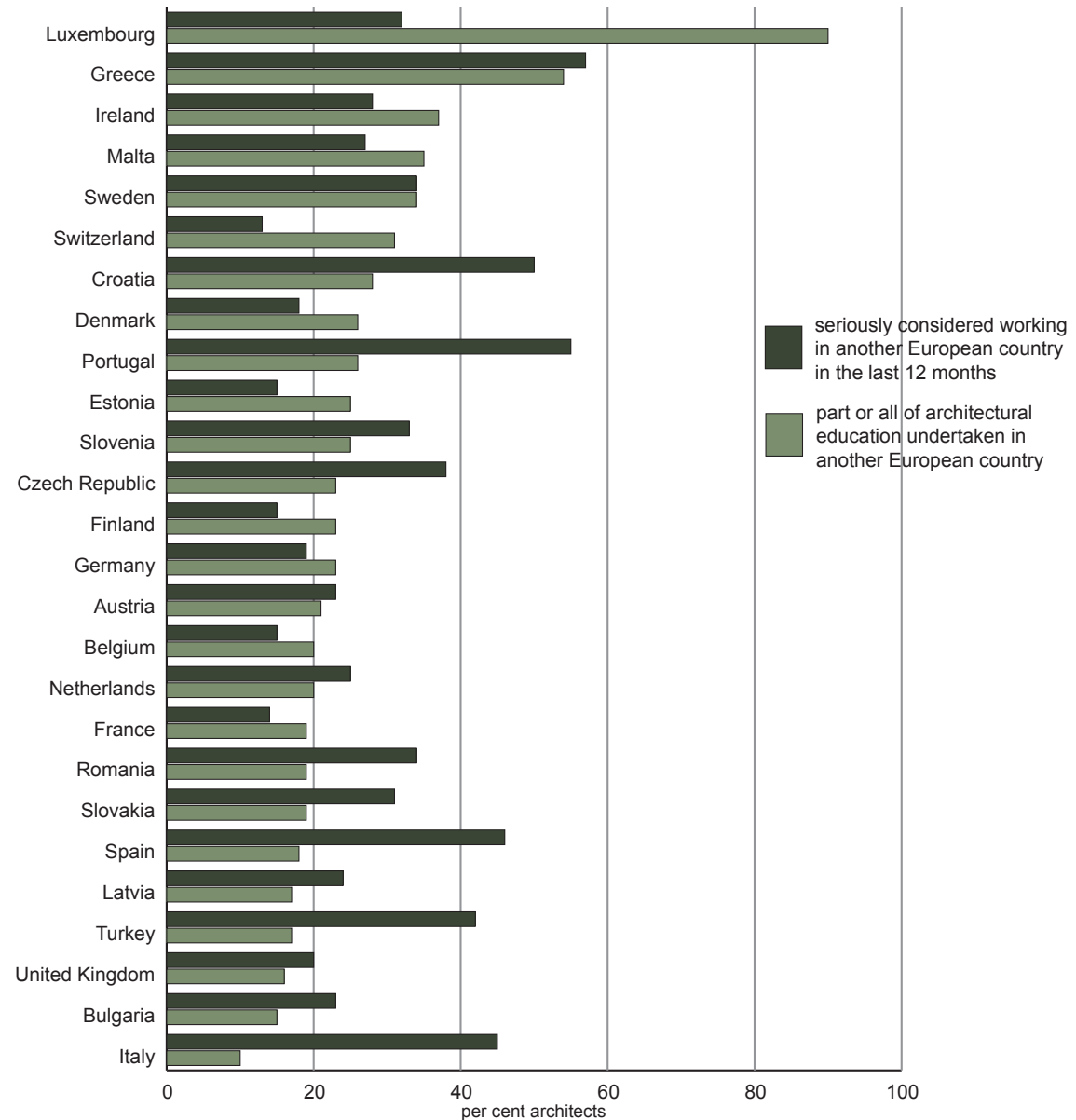
* see left for table footnotes

Many more architects have “seriously considered” working in another country in the last 12 months: 35 per cent. Highest proportions are recorded in Greece, Portugal and Croatia (50 per cent or more) while more than 40 per cent of architects in Italy, Spain and Turkey have considered working elsewhere.

Another new question for 2014 reports on how many architects undertook part of their architectural education in another European country. Overall, 18 per cent of respondents studied in a different European country from the one in which they are now principally established. The highest proportion is recorded by architects in Luxembourg (90 per cent) and in Greece (54 per cent).

There is some relationship between having been educated in another country and seriously considering working in another country. There are strong correlations for Greece (54 per cent and 57 per cent respectively), Sweden (34 per cent for both) and Ireland (37 and 28 per cent). Portugal also shows a correlation, although here the relationship is the opposite from that in the previously mentioned countries, so more architects have seriously considered working in another country (55 per cent) than were at least partly educated in another country (26 per cent).

CHART 4-8
Architects who were at least partly educated in another European country, compared with architects who have seriously considered worked in another European country



4.6 Main concerns about working in another country

The biggest concern for architects about working in another country is practical, relocation or personal issues. Almost half (47 per cent) of architects responding to this question thought this was a major concern. Particularly high proportions of architects in Italy, Croatia, Greece and Romania thought this was a major concern. Insufficient language skills were considered to be the main concern for a majority of architects in Spain and the United Kingdom, while 37 per cent overall were concerned about their knowledge of planning or building regulations. For about 30 per cent, or more, of architects in Greece, Portugal and Turkey a main concern was that they had been unable to find work in another European country. Knowledge of the local market was a main concern for almost half of French respondents.

CHART 4-9

Main concerns about working in another country



TABLE 4-7

Main concerns about working in another country cited by responding architects

per cent	unable to find work	insufficient language skills	insufficient knowledge of planning / building regulations	architectural qualification issues	practical, relocation or personal issues	knowledge of local market	knowledge of local fee scales / tariffs	PII cover for work in other European countries
Austria	10	17	40	6	35	34	14	13
Belgium	13	25	48	10	41	41	18	10
Bulgaria*	26	36	53	13	43	38	21	13
Croatia	13	35	51	21	63	21	15	8
Czech Republic*	8	38	69	15	46	15	8	8
Denmark	12	13	25	5	44	13	8	5
Estonia*	26	16	53	5	53	32	16	5
Finland	16	21	38	4	48	25	13	9
France	18	45	47	9	47	48	18	16
Germany	6	34	45	8	48	24	18	16
Greece	43	23	40	14	56	26	11	11
Ireland	21	44	39	6	53	30	15	12
Italy	12	43	28	6	64	25	5	6
Latvia*	26	29	50	9	29	44	12	12
Luxembourg	10	7	33	12	32	32	8	18
Malta*	26	10	38	11	54	28	15	17
Netherlands*	12	12	40	11	51	26	9	5
Portugal	31	25	26	7	49	18	6	6
Romania	24	15	41	22	58	36	15	23
Slovakia	16	48	49	6	35	34	17	11
Slovenia*	32	23	57	19	57	25	8	8
Spain	37	51	43	18	26	27	7	11
Sweden	10	14	19	6	38	14	3	3
Switzerland	11	12	29	11	46	21	15	9
Turkey	36	41	29	27	27	20	7	5
United Kingdom	25	50	43	11	40	31	18	16
2014 EUROPE-26	18	38	37	11	47	26	11	10
2012 EUROPE-25	19	39	35	11	66	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

* caution - small sample

Netherlands: BNA Benchmark Research 2014

2012/10/08 n/a = question was not asked

4.7 Retirement

TABLE 4-8
Age at which Architects expect to retire, analysed by country

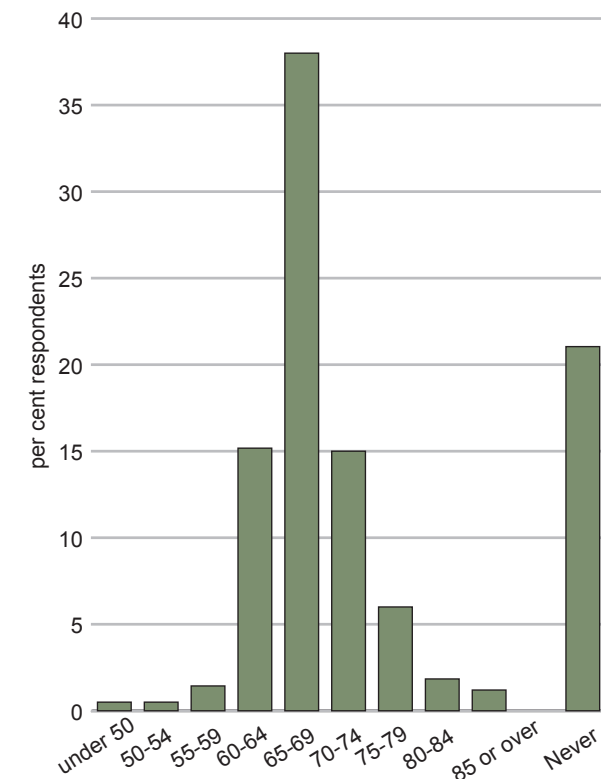
per cent	under 50	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85 or over	never
Austria	0	1	0	4	33	35	9	4	2	12
Belgium	0	0	3	20	43	17	5	1	1	9
Bulgaria*	0	1	1	27	28	11	5	1	3	23
Croatia	0	0	4	21	33	9	2	0	1	30
Czech Republic*	0	0	0	0	15	23	15	8	8	31
Denmark	0	0	0	9	54	25	4	2	1	6
Estonia*	0	0	0	10	10	30	30	0	5	15
Finland	0	1	1	30	48	8	2	1	0	7
France	0	1	1	22	38	17	6	1	2	12
Germany	0	0	1	19	61	10	3	1	1	4
Greece	1	1	1	22	37	11	3	1	1	22
Ireland	0	0	2	10	35	19	7	2	3	23
Italy	0	0	1	14	29	19	6	3	2	26
Latvia*	0	3	6	17	20	9	6	3	3	34
Luxembourg	0	1	3	23	45	14	3	1	2	9
Malta*	0	1	7	41	30	11	0	0	3	8
Netherlands*	0	0	2	27	46	14	4	2	1	4
Portugal	1	1	2	12	30	11	4	1	3	35
Romania	1	1	4	21	25	10	8	2	3	26
Slovakia	0	1	3	27	23	14	3	2	1	27
Slovenia*	0	0	2	18	33	14	6	2	2	24
Spain	0	0	0	8	41	16	5	1	2	26
Sweden	0	0	0	12	64	15	3	1	1	4
Switzerland	0	1	2	17	47	17	5	1	0	12
Turkey	9	14	14	19	15	5	3	1	1	20
United Kingdom	0	1	2	11	37	20	9	2	2	15
2014 EUR-26	1	1	2	15	38	15	6	2	1	19
2012 EUR-25	1	1	2	14	34	16	6	2	2	23
2010 EUR-23	2	3	5	20	37	13	4	1	1	14
2008 EUR-17	3	4	7	20	39	11	3	1	1	12

* caution - small sample

Netherlands: BNA Benchmark Research 2014

The chart shows two peaks in the age at which architects think they will retire. The highest peak, representing 38 per cent of architects, is age 65 to 69. The second peak (19 per cent) is 'never' - architects will continue to work as an architect until they die. Another 21 per cent say they will continue to work into their seventies, 3 per cent into their eighties.

CHART 4-10
Age at which Architects expect to retire



Almost three quarters of architects will “definitely”, or “probably”, continue to work as an architect until they retire. Eight per cent will almost certainly not continue as an architect - this is the same proportion as the 2012 survey but higher than in 2010 or 2008. The highest proportion of architects who expect to leave the profession are in Portugal (14 per cent will probably or definitely not continue to work as an architect until retirement), Spain (12 per cent) and Italy (11 per cent). These three countries, along with Greece, also have a high proportion of architects saying “not sure” (22 per cent or more).

Thirty six per cent of the profession say they will “definitely” continue to work as an architect until they retire. The proportion is highest in Romania (56 per cent) and Slovakia (50 per cent).

CHART 4-11
Likelihood of continuing to work as an Architect until retirement

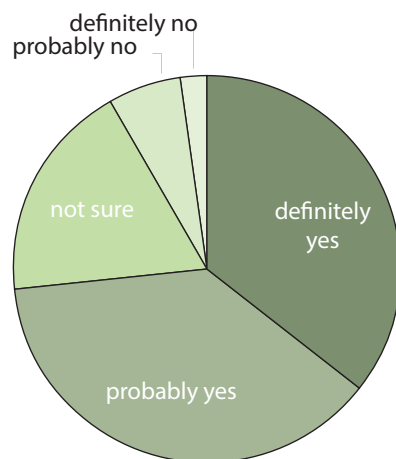


TABLE 4-9
Whether Architects will continue to practice their profession until they retire

per cent	definitely yes	probably yes	not sure	probably no	definitely no
Austria	48	46	5	1	0
Belgium	25	44	21	7	3
Bulgaria*	49	34	10	4	3
Croatia	34	51	13	2	0
Czech Republic*	38	23	23	8	8
Denmark	42	45	10	3	1
Estonia*	39	50	11	0	0
Finland	39	49	9	3	0
France	29	44	20	5	2
Germany	34	43	16	5	2
Greece	35	30	27	6	2
Ireland	34	46	13	5	1
Italy	31	34	24	8	3
Latvia*	51	31	14	3	0
Luxembourg	42	44	11	2	1
Malta*	28	53	15	4	0
Netherlands*	40	45	10	5	0
Portugal	31	29	26	12	2
Romania	56	34	8	2	0
Slovakia	50	37	11	1	1
Slovenia*	29	53	16	2	0
Spain	36	31	22	9	3
Sweden	41	43	12	4	1
Switzerland	43	42	13	2	0
Turkey	43	40	12	4	1
United Kingdom	40	42	11	6	2
2014 EUROPE-26	36	38	18	6	2
2012 EUROPE-25	35	39	18	6	2
2010 EUROPE-23	41	43	12	3	1
2008 EUROPE-17	39	42	13	4	2

* caution - small sample

Netherlands: BNA Benchmark Research 2014

4.8 Hours Worked

Architects in the private sector report longer working hours than in the public sector. Sole Principals and Partners/Directors work on average 45 hours per week, higher than in other employment fields. Private practice salaried architects record an average 44 hours, the same as Freelancers. Public sector architects average 40 hours (government) and 41 hours (other public) per week.

The longest average working hours are reported by Sole Principals in Austria and Belgium, and by Partners and Directors in Austria, Belgium and Germany - each recording over 50 hours per week. Private practice salaried architects in Turkey report the longest working week, also over 50 hours.

TABLE 4-10

Difference between average hours contracted to work and average hours worked

number of hours	difference between contracted and worked hours per week
sole principal	0.6
partner / director	3.6
private practice salaried	4.0
freelance	4.4
other private	3.7
local / central government	3.2
other public	4.6
2014 EUROPE-26	3.7
2012 EUROPE-25	3.9
2010 EUROPE-23	3.5
2008 EUROPE-17	4.9

TABLE 4-11

Average (mean) number of hours worked per week, analysed by country and field of employment

hours / week	sole principal	partner / director	private practice salaried	freelance	other private	local / central government	other public
Austria	52.0	50.5	47.5	41.0	n/a	n/a	n/a
Belgium	52.1	52.3	42.9	42.4	44.2	39.5	40.2
Bulgaria*	50.7	37.1	44.6	n/a	n/a	n/a	n/a
Croatia	43.9	45.8	39.3	n/a	n/a	38.8	60.0
Czech Republic*	n/a	n/a	45.0	n/a	n/a	n/a	40.0
Denmark	44.1	46.2	40.0	n/a	39.7	39.3	41.2
Estonia*	n/a	n/a	46.7	n/a	n/a	n/a	n/a
Finland	44.5	47.0	39.1	n/a	40.5	39.3	41.8
France	46.9	41.0	44.7	48.1	47.9	44.1	41.8
Germany	50.6	50.8	44.3	n/a	45.2	43.2	44.3
Greece	43.7	47.7	42.6	44.5	n/a	40.4	49.7
Ireland	47.7	45.3	45.0	n/a	n/a	41.5	40.0
Italy	41.4	41.4	42.3	42.3	43.2	39.6	39.0
Latvia*	46.6	45.3	42.5	n/a	n/a	n/a	n/a
Luxembourg	47.4	43.4	n/a	n/a	n/a	n/a	n/a
Malta*	50.9	n/a	45.5	n/a	46.3	43.6	n/a
Netherlands*	44.3	16.4	40.2	39.8	39.6	40.0	n/a
Portugal	42.6	41.4	43.5	43.0	45.1	39.7	40.1
Romania	43.2	45.3	43.2	n/a	n/a	n/a	34.2
Slovakia	46.4	46.0	43.8	44.4	42.7	44.5	42.2
Slovenia*	46.5	40.5	39.2	n/a	n/a	n/a	n/a
Spain	44.9	44.6	49.5	n/a	44.3	38.6	37.8
Sweden	44.2	44.8	41.1	n/a	39.6	41.3	n/a
Switzerland	48.4	47.0	45.6	n/a	46.0	44.6	46.5
Turkey	49.0	49.7	50.5	44.8	42.5	39.4	41.7
United Kingdom	47.4	45.3	43.6	n/a	42.1	39.2	44.8
2014 EUROPE-26	44.5	45.3	43.9	42.9	44.0	40.3	41.0
2012 EUROPE-25	45.3	46.1	43.2	40.2	43.1	38.1	38.9
2010 EUROPE-23	46.2	45.8	41.2	43.9	44.8	38.3	38.4
2008 EUROPE-17	51.0	50.1	46.0	47.0	46.6	42.2	43.3

* caution - small sample

Netherlands: BNA Benchmark Research 2014

4.9 Career Satisfaction

Architects were invited to rate their satisfaction with four professional areas: career; pay; business environment and quality of life. Respondents selected their satisfaction level on a scale of 0 (totally dissatisfied) to 10 (totally satisfied).

Architects are most satisfied with their choice of architecture as a career; the average score here is 6.9 out of 10. Satisfaction with the business environment (colleagues, fellow professionals, public planning bodies and so on) receives an

average score of 5.8 while satisfaction with the quality of life is slightly lower, recording an average score of 5.5. Architects are least satisfied with the amount they are paid: this receives a satisfaction score of just 4.1 out of 10.

The highest average satisfaction scores are recorded by architects in Sweden, Denmark and Finland and Switzerland. The lowest scores are most frequently reported by architects in Italy, Ireland, Portugal and Spain. These findings are similar to those from the 2012 survey.

CHART 4-12

Professional satisfaction, ranked, highest first satisfaction with ...

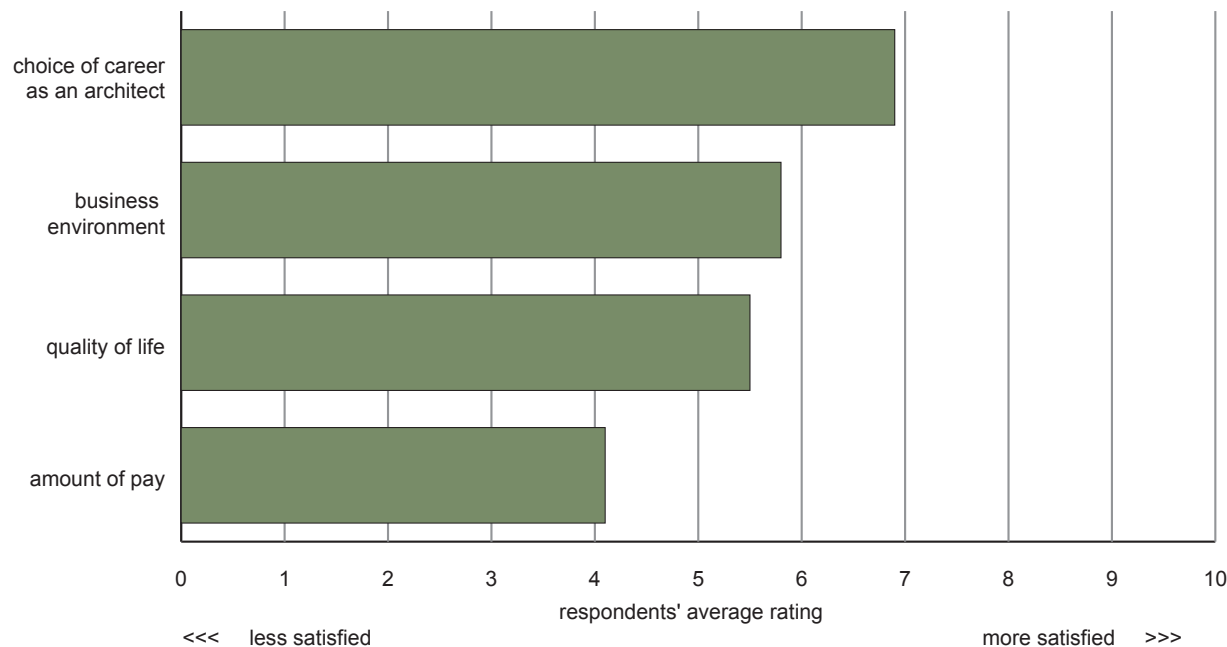


CHART 4-13

Change in architects' average rating scores - satisfaction with choice of career (all survey countries), 2008-14

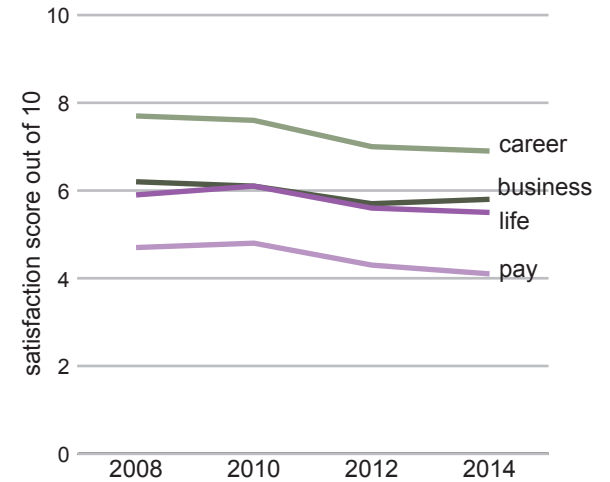


TABLE 4-12

Satisfaction with choice of career as an Architect, analysed by country

score, 0 to 10 (10= very satisfied)	ALL
Austria	8.1
Belgium	7.0
Bulgaria*	7.0
Croatia	8.0
Czech Republic*	7.8
Denmark	8.3
Estonia*	7.7
Finland	8.1
France	7.2
Germany	7.4
Greece	7.1
Ireland	6.7
Italy	6.3
Latvia*	7.4
Luxembourg	7.7
Malta*	7.3
Netherlands*	7.2
Portugal	6.4
Romania	8.1
Slovakia	7.4
Slovenia*	8.0
Spain	7.2
Sweden	8.3
Switzerland	8.3
Turkey	7.6
United Kingdom	7.4
2014 EUROPE-26	6.9
2012 EUROPE-25	7.0
2010 EUROPE-23	7.6
2008 EUROPE-17	7.7

* caution - small sample

Netherlands: BNA Benchmark Research 2014

CHART 4-14

Satisfaction with choice of architecture as a career

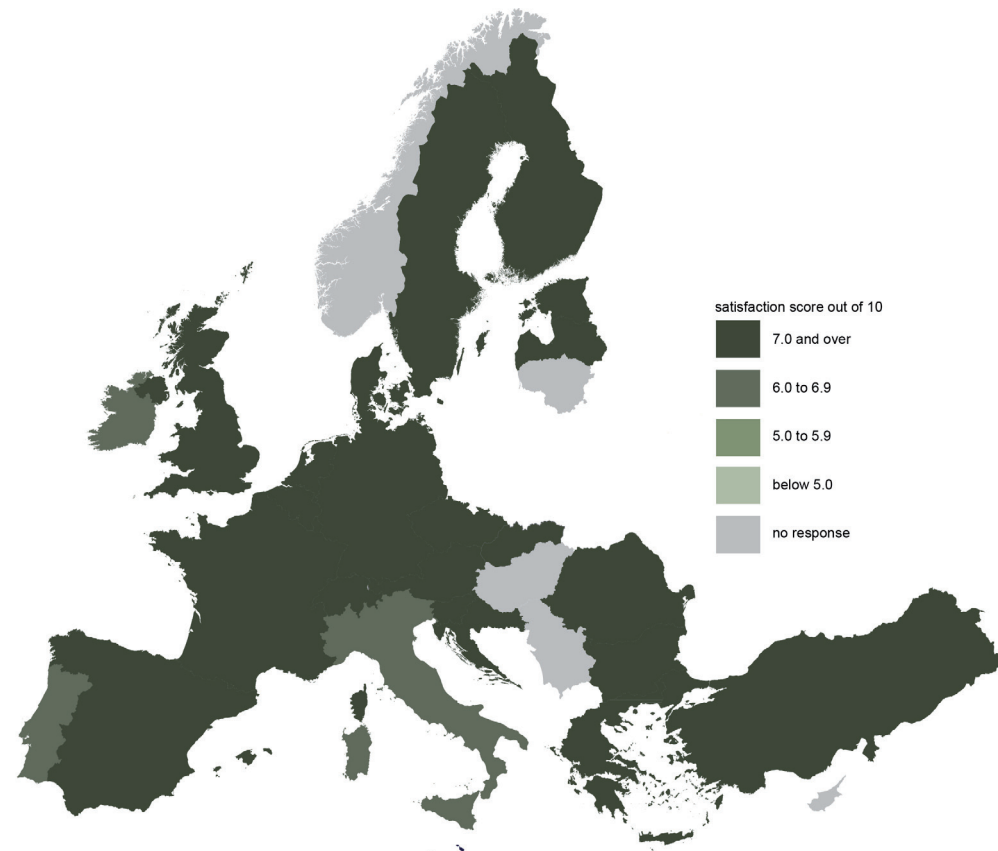


TABLE 4-13

Architects' satisfaction with the amount they are paid analysed by country

score, 0 to 10 (10= very satisfied)	ALL
Austria	4.5
Belgium	4.3
Bulgaria*	3.7
Croatia	4.5
Czech Republic*	4.5
Denmark	6.9
Estonia*	5.0
Finland	6.5
France	4.2
Germany	5.1
Greece	3.2
Ireland	3.4
Italy	3.6
Latvia*	5.0
Luxembourg	5.8
Malta*	4.4
Netherlands*	5.4
Portugal	3.0
Romania	4.3
Slovakia	3.9
Slovenia*	3.2
Spain	3.4
Sweden	6.8
Switzerland	6.8
Turkey	4.5
United Kingdom	4.8
2014 EUROPE-26	4.1
2012 EUROPE-25	4.3
2010 EUROPE-23	4.8
2008 EUROPE-17	4.7

* caution - small sample

Netherlands: BNA Benchmark Research 2014

CHART 4-15

Satisfaction with amount paid

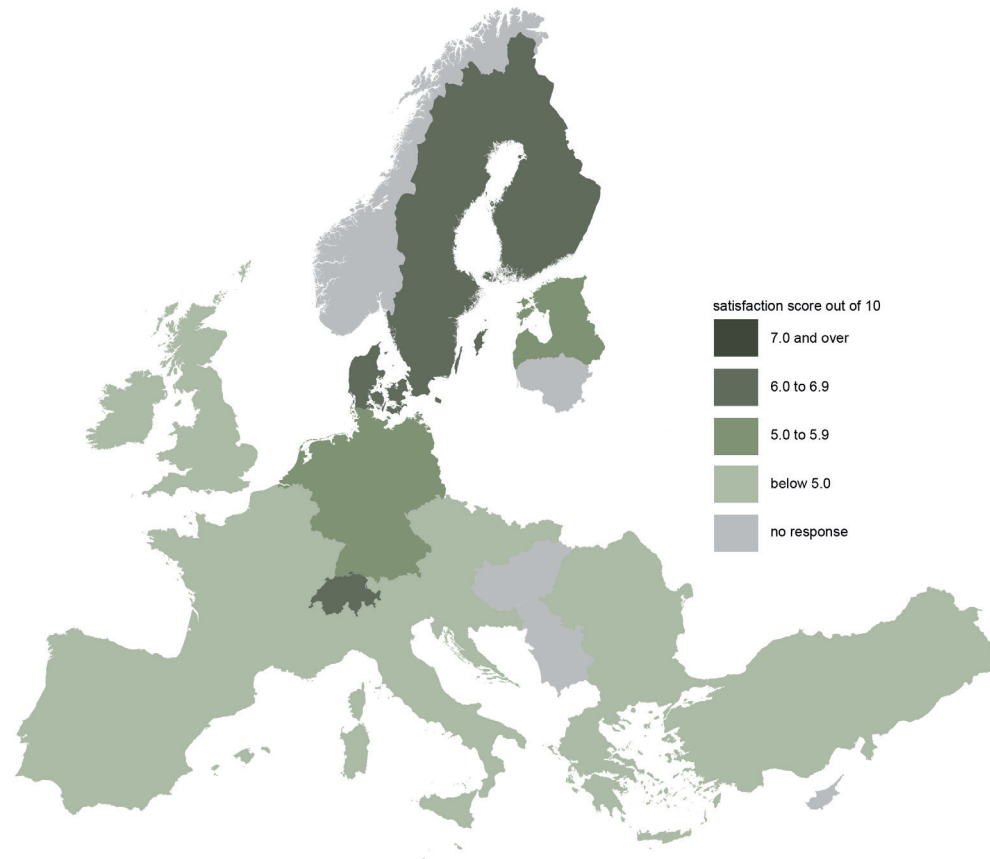


TABLE 4-14

Architects' satisfaction with their quality of life analysed by country

score, 0 to 10 (10= very satisfied)	ALL
Austria	6.3
Belgium	5.6
Bulgaria*	4.2
Croatia	5.3
Czech Republic*	6.7
Denmark	8.0
Estonia*	6.0
Finland	7.6
France	5.5
Germany	6.0
Greece	4.9
Ireland	5.4
Italy	5.1
Latvia*	6.0
Luxembourg	6.3
Malta*	5.8
Netherlands*	7.8
Portugal	4.3
Romania	5.7
Slovakia	5.6
Slovenia*	5.3
Spain	4.7
Sweden	7.6
Switzerland	7.4
Turkey	5.3
United Kingdom	6.3
2014 EUROPE-26	5.5
2012 EUROPE-25	5.6
2010 EUROPE-23	6.1
2008 EUROPE-17	5.9

* caution - small sample

Netherlands: BNA Benchmark Research 2014

CHART 4-16

Satisfaction with quality of life

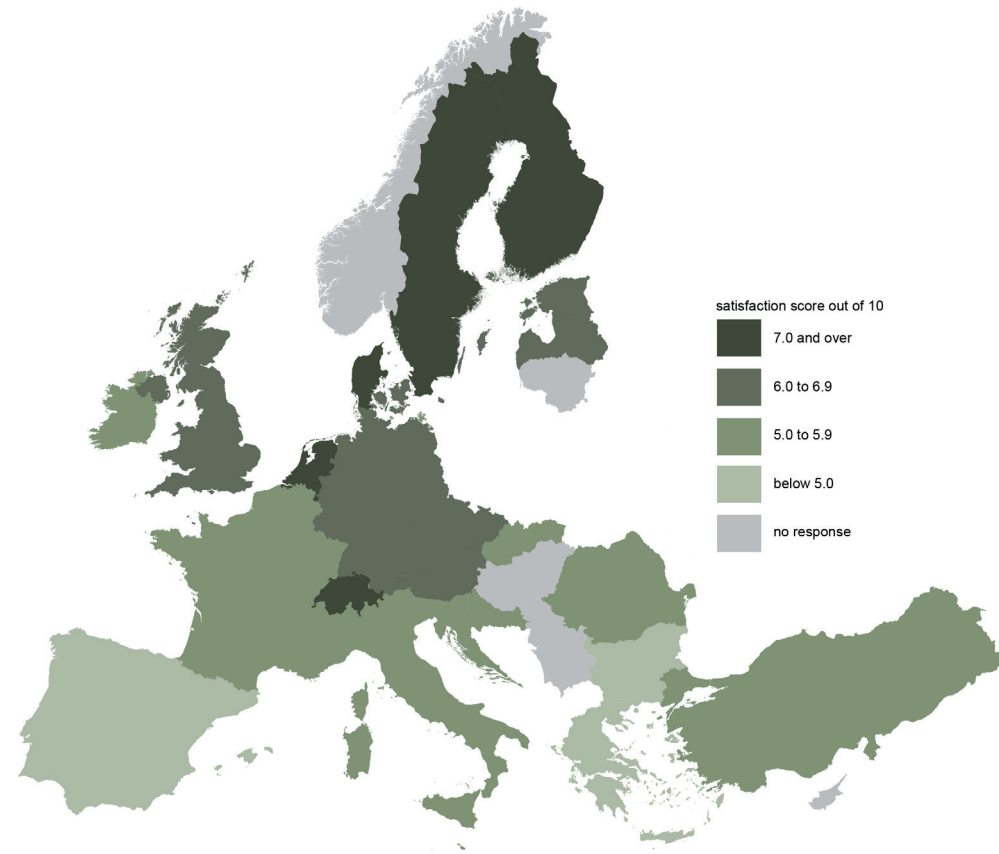


TABLE 4-15

Architects' satisfaction with the business environment in which they work analysed by country

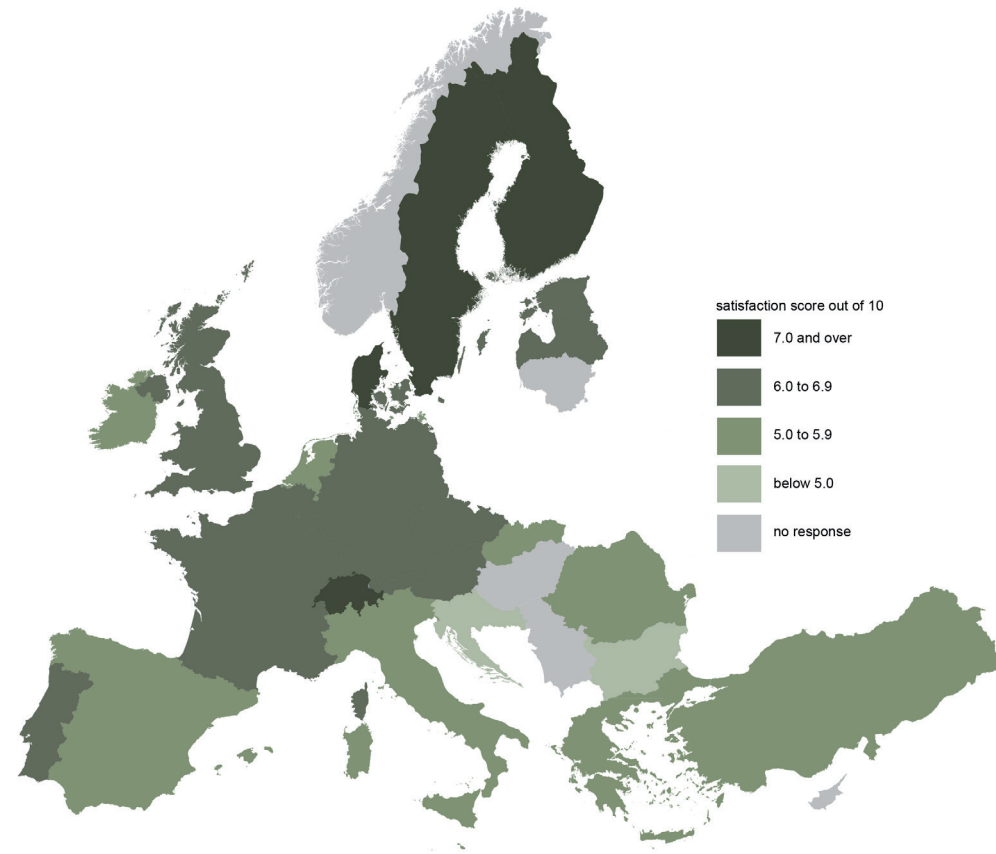
score, 0 to 10 (10= very satisfied)	ALL
Austria	6.1
Belgium	6.6
Bulgaria*	4.6
Croatia	4.5
Czech Republic*	6.2
Denmark	7.4
Estonia*	6.8
Finland	7.0
France	6.0
Germany	6.8
Greece	5.6
Ireland	5.4
Italy	5.1
Latvia*	6.0
Luxembourg	6.7
Malta*	5.7
Netherlands*	5.7
Portugal	6.1
Romania	5.7
Slovakia	5.6
Slovenia*	4.8
Spain	5.6
Sweden	7.1
Switzerland	7.4
Turkey	5.4
United Kingdom	6.4
2014 EUROPE-26	5.8
2012 EUROPE-25	5.7
2010 EUROPE-23	6.1
2008 EUROPE-17	6.2

* caution - small sample

Netherlands: BNA Benchmark Research 2014

CHART 4-17

Satisfaction with the business environment in which they work - including colleagues, fellow professionals, public planning bodies etc



4.10 Continuing Professional Development (CPD)

On average, Europe's architects undertake 20 hours of CPD per year. But the range varies considerably; from an average of zero hours CPD by architects in Turkey, to 50 or more in Spain and Bulgaria.

Similarly, personal expenditure on CPD activities varies considerably. The average across Europe is €150 per year, but is zero in several countries. Highest expenditure is reported by architects in Austria, who spend an average of €1000 per year on CPD activities. analysed by field of employment, highest average expenditure on CPD is incurred by Sole Principals. Architects in salaried positions in private practice spend an average of just €30 per year personally; while architects in the public sector say they spend nothing at all, personally, on CPD events and activities.

TABLE 4-16
 CPD hours and spend, analysed by country

	average (median) number hours CPD per year	personal expenditure on CPD, € per year (unadjusted for PPP)
Austria	40	1000
Belgium	20	121
Bulgaria*	95	204
Croatia	20	66
Czech Republic*	10	0
Denmark	25	0
Estonia*	20	150
Finland	10	0
France	0	0
Germany	20	200
Greece	30	200
Ireland	40	200
Italy	20	250
Latvia*	40	200
Luxembourg	16	400
Malta*	13	150
Netherlands*	16	250
Portugal	15	1
Romania	12	0
Slovakia	6	0
Slovenia*	20	275
Spain	50	300
Sweden	20	0
Switzerland	20	410
Turkey	0	0
United Kingdom	37	0
2014 EUROPE-26	20	150
2012 EUROPE-25	38	300
2010 EUROPE-23**	n/a	n/a
2008 EUROPE-17**	n/a	n/a

* caution small sample Netherlands: BNA Benchmark Research 2014

** question was not asked in 2008 or 2010

TABLE 4-17

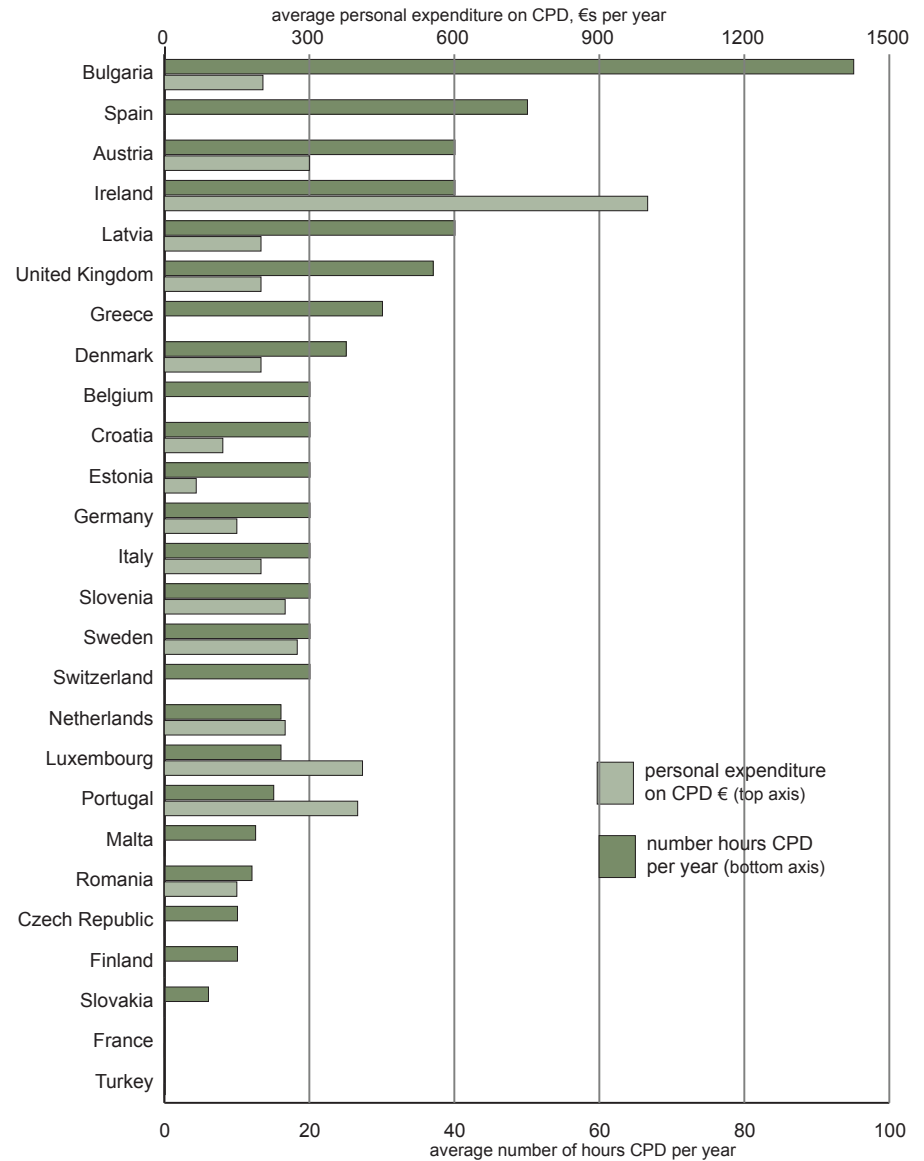
CPD hours and spend, analysed by field of employment

	average (median) number hours CPD per year	personal expenditure on CPD, € per year (unadjusted for PPP)
sole principal	20	300
partner / director	25	244
private practice salaried	20	30
freelance	20	200
other private	20	200
local / central government	20	0
other public	20	0
2014 EUROPE-26	20	150
2012 EUROPE-25	38	300
2010 EUROPE-23*	n/a	n/a
2008 EUROPE-17*	n/a	n/a

* question was not asked in 2008 or 2010

CHART 4-18

CPD hours (bottom axis) and spend (top axis), analysed by country



4.11 Building to Nearly Zero Energy Standard

TABLE 4-18

How often architects are currently being asked to design energy efficiency as a retrofit service by their clients, analysed by country

per cent respondents	less than 10% of the time	between 10% and 25% of the time	between 26% and 50% of the time	more than 50% of the time	always
Austria	27	26	24	19	4
Belgium	24	22	22	24	9
Bulgaria*	43	23	13	13	9
Croatia	63	21	11	5	0
Czech Republic*	70	20	10	0	0
Denmark	37	19	20	16	8
Estonia*	35	0	25	20	20
Finland	77	11	4	5	2
France	35	21	21	15	8
Germany	42	19	20	16	2
Greece	55	23	13	7	1
Ireland	33	17	22	22	6
Italy	60	18	14	6	2
Latvia*	32	24	26	12	6
Luxembourg	23	26	25	21	4
Malta*	70	20	7	3	0
Netherlands*	50	23	15	10	2
Portugal	60	17	13	7	3
Romania	57	20	11	8	4
Slovakia	43	28	20	7	2
Slovenia*	26	20	28	16	10
Spain	74	13	6	4	2
Sweden	73	15	7	3	2
Switzerland	27	28	23	19	3
Turkey	72	12	8	5	4
United Kingdom	55	18	15	9	2
2014 EUROPE-26	55	17	14	11	3
2012 EUROPE-25	n/a	n/a	n/a	n/a	n/a
2010 EUROPE-23	n/a	n/a	n/a	n/a	n/a
2008 EUROPE-17	n/a	n/a	n/a	n/a	n/a

* caution - small sample Netherlands: BNA Benchmark Research 2014 2008/10/12 question was not asked in previous surveys

In a new question this year, respondents say how often they are being asked to design energy efficiency as a retrofit service by their clients. Three per cent of respondents say they are “always” designing energy efficiency as a retrofit service, 11 per cent between 50 and 99 per cent of the time. The majority, 55 per cent, state they are being asked to design energy efficiency as a retrofit service less than 10 per cent of the time.

Building to Nearly Zero energy standards remains a minority issue. Only 4 per cent of architects say they do this “always”, while just 10 per cent say they build to Nearly Zero energy standards more than 50 per cent of the time. Together, 14 per cent of respondents build to Nearly Zero energy standards at least 50 per cent of the time, a slight improvement on the 2012 survey figure of 12 per cent. A further 27 per cent of architects build to Nearly Zero energy standards between 10 and 49 per cent of the time - leaving the majority, 59 per cent, building no more than 10 per cent of their designs to Nearly Zero energy standards. This is a rise on the 2012 figure of 53 per cent.

Countries which have higher proportions of architects who build to nearly zero energy standards are Austria, Luxembourg, Switzerland and Germany. For high proportions of architects designing energy efficiency as a retrofit service, these countries are joined by Belgium, Denmark, Finland, France.

TABLE 4-19

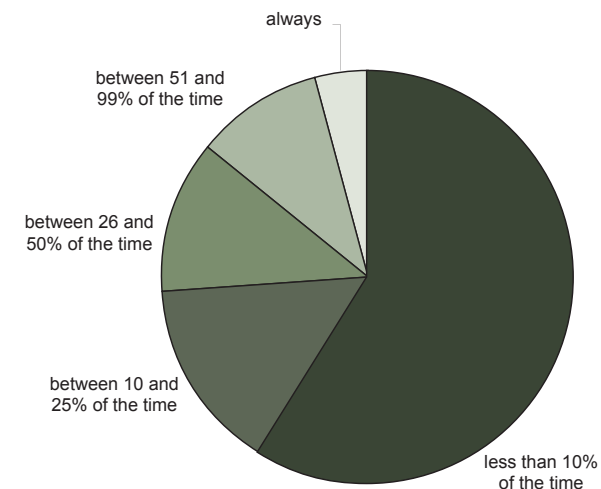
How often architects are being asked to build to Nearly Zero Energy standards, analysed by country

per cent respondents	less than 10% of the time	between 10% and 25% of the time	between 26% and 50% of the time	between 51% and 99% of the time	always
Austria	26	20	18	28	8
Belgium	64	16	9	9	2
Bulgaria*	67	11	14	4	3
Croatia	71	14	8	7	0
Czech Republic*	36	45	9	9	0
Denmark	52	15	17	12	4
Estonia*	75	20	5	0	0
Finland	65	15	9	9	1
France	56	14	12	11	8
Germany	50	18	12	15	6
Greece	62	13	13	9	3
Ireland	64	16	13	6	1
Italy	56	17	15	8	4
Latvia*	68	15	9	6	3
Luxembourg	24	24	19	25	7
Malta*	86	10	3	1	0
Netherlands*	60	18	10	10	2
Portugal	63	14	11	8	4
Romania	59	19	8	9	5
Slovakia	58	21	14	5	3
Slovenia*	64	8	8	18	2
Spain	79	9	6	2	3
Sweden	83	7	6	3	2
Switzerland	23	19	28	25	6
Turkey	68	13	9	4	6
United Kingdom	73	10	9	7	1
2014 EUROPE-26	59	15	12	10	4
2012 EUROPE-25	53	20	14	9	3
2010 EUROPE-23	58	15	15	8	4
2008 EUROPE-17*	n/a	n/a	n/a	n/a	n/a

* caution small sample Netherlands: BNA Benchmark Research 2014
2008 - question was not asked in 2008

CHART 4-19

How often respondents are currently being asked to build to Nearly Zero Energy standards by clients or through regulation



Section 2: Country Profiles



Architect: JSW/D Architekten / Chaix & Morel et Associés
Project: ThyssenKrupp Headquarter Q1
Photographer: Thomas Robbin
Place: Essen – Germany

Section 2 Contents

	page:
Austria	70
Belgium	71
Bulgaria	72
Croatia	73
Czech Republic	74
Denmark	75
Estonia	76
Finland	77
France	78
Germany	79
Greece	80
Hungary	81
Ireland	82
Italy	83
Latvia	84
Lithuania	85
Luxembourg	86
Malta	87
Netherlands	88
Portugal	89
Romania	90
Slovakia	91
Slovenia	92
Spain	93
Sweden	94
Switzerland	95
Turkey	96
United Kingdom	97



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

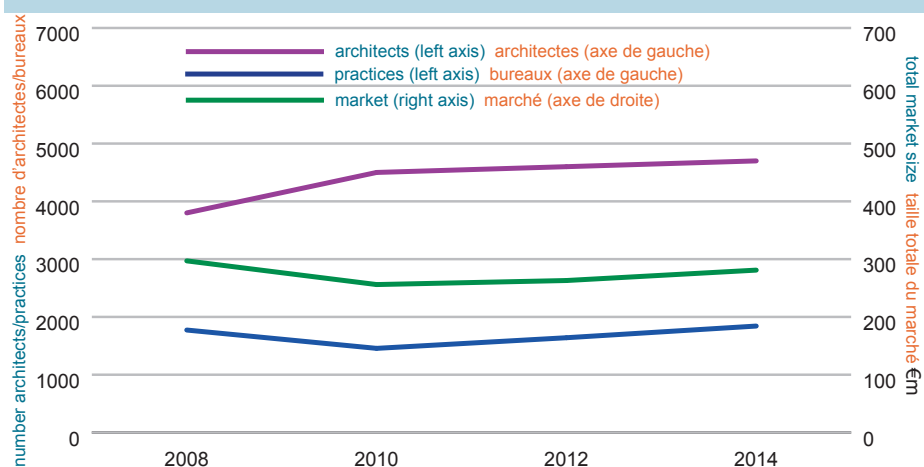
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Belgique

Belgium

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

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

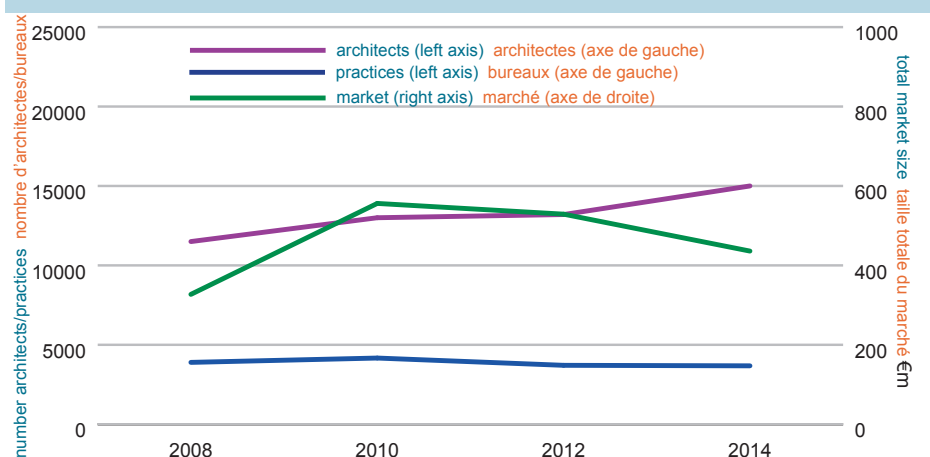
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Bulgaria

Bulgaria

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

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

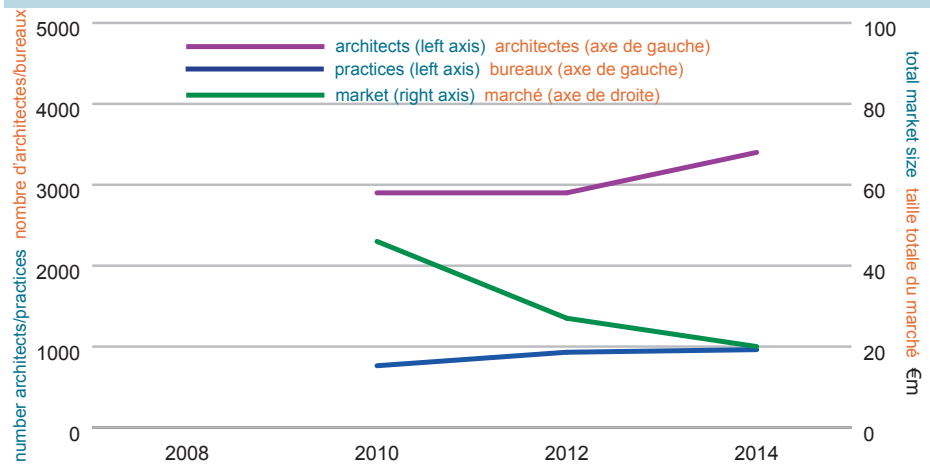
Architectural Profession Profession d'architecte

	2008	2010	2012	2014
Architects Architectes	n/a	2 900	2 900	3 400
% Male Homme	n/a	50	45	47
% Female Femme	n/a	50	55	53
% <40 years <40 ans	n/a	45	41	46
Practices Bureaux	n/a	763	930	962

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

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

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

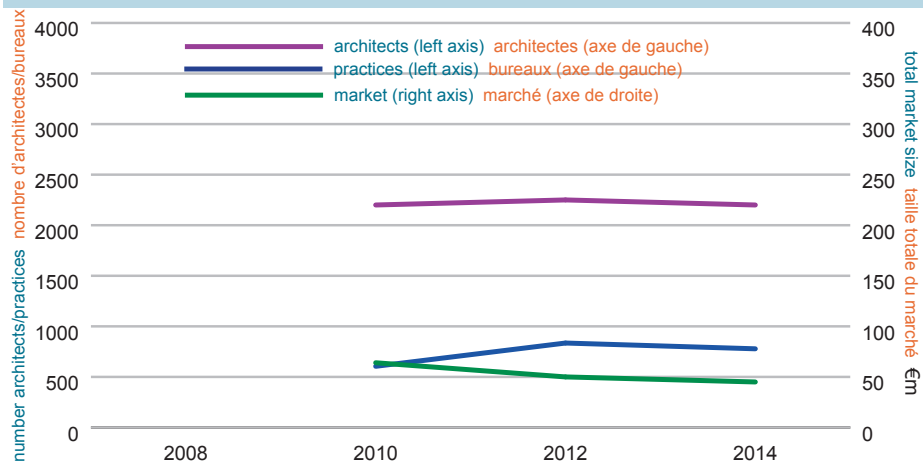
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

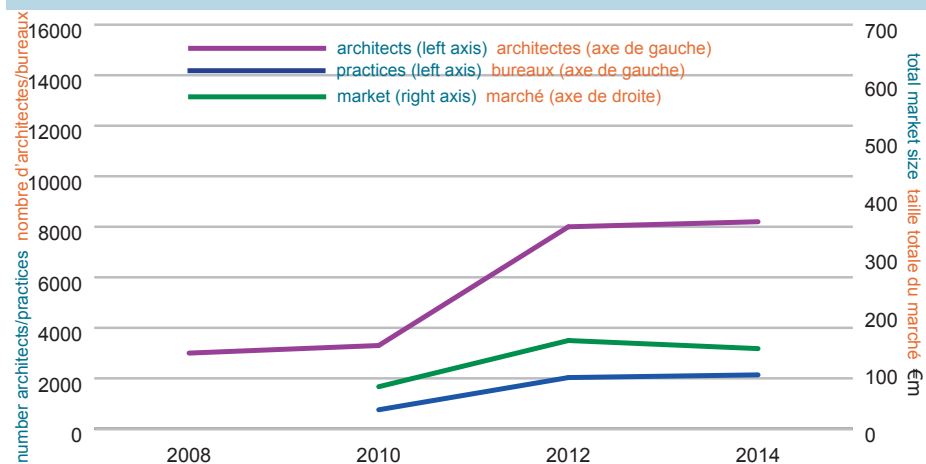
Architectural Profession Profession d'architecte * 2012 data revised

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

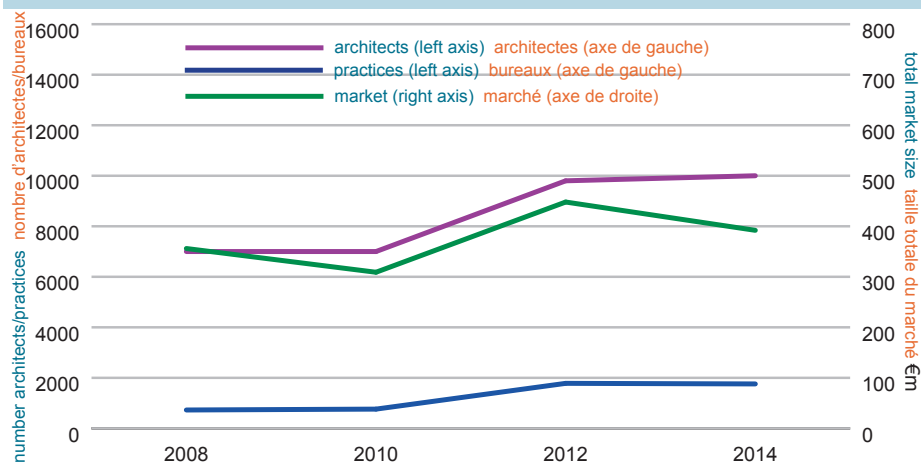
Architectural Profession Profession d'architecte * 2012 data revised

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

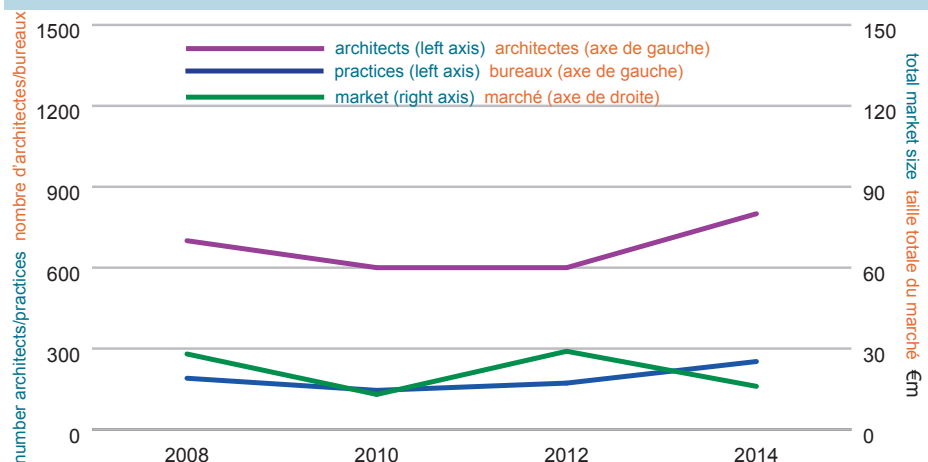
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

	Average earnings €* Revenu moyen en € *			
	2008	2010	2012	2014
Sole Principals Dirigeant unique	41 280	n/a	7 200	35 500
Partners & Directors Associé dirigeant	25 800	n/a	20 000	13 000
Private practice Salaried Salarié – Secteur privé	n/a	11 504	13 500	17 750
Private in-house L'industrie / commerce	n/a	n/a	10 000	n/a
Freelance Indépendant	n/a	15 786	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	25 800	11 504	10 080	n/a

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

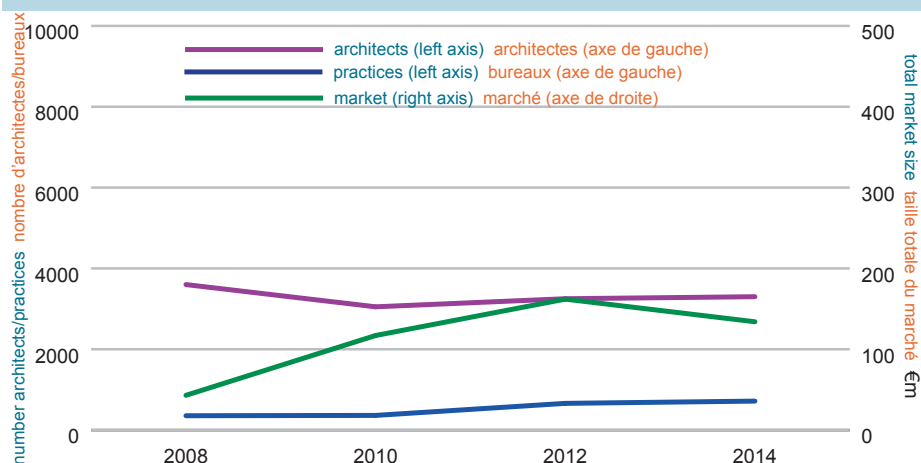
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

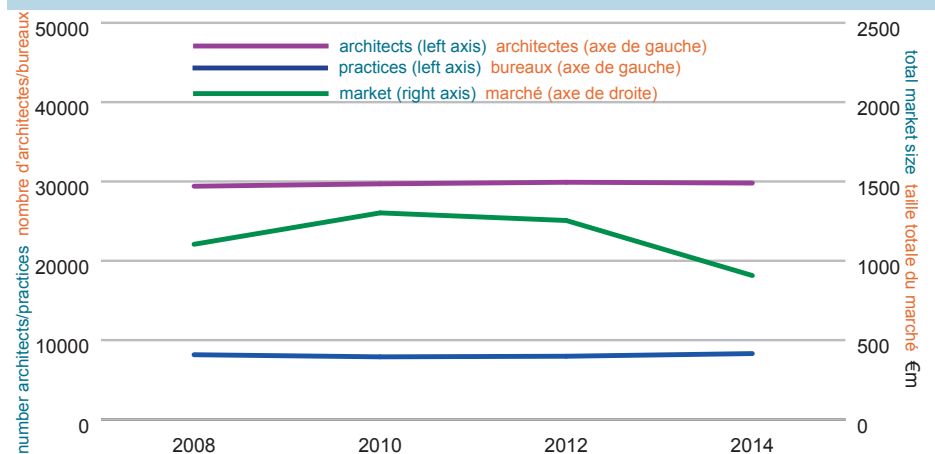
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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

France

France



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

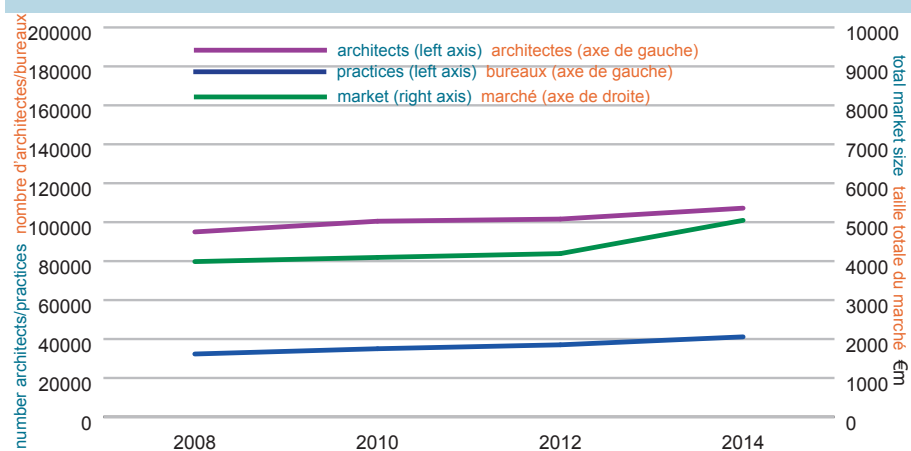
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

	2008	2010	2012	2014
Participants Répondants	3,460	393	840	1392
Accuracy of results 95% confidence Précision des résultats: 95% confiance	+/-2%	+/-5%	+/- 3.4	+/- 2.6

Allemagne



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

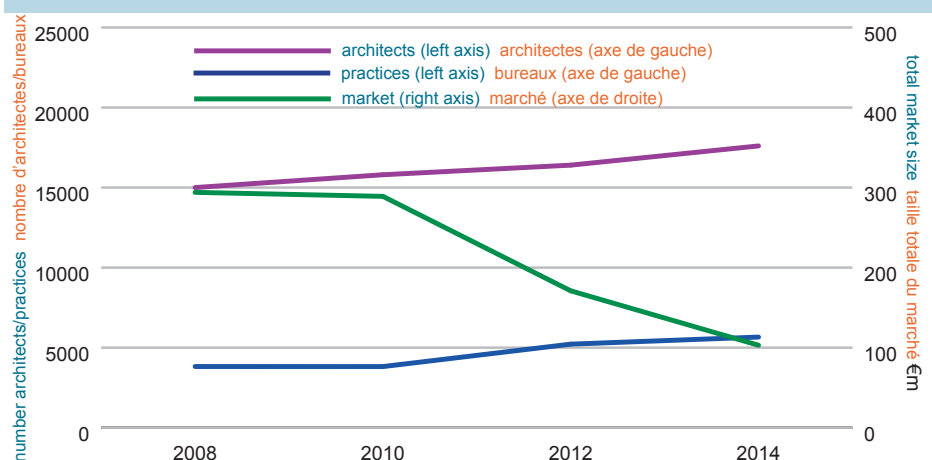
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

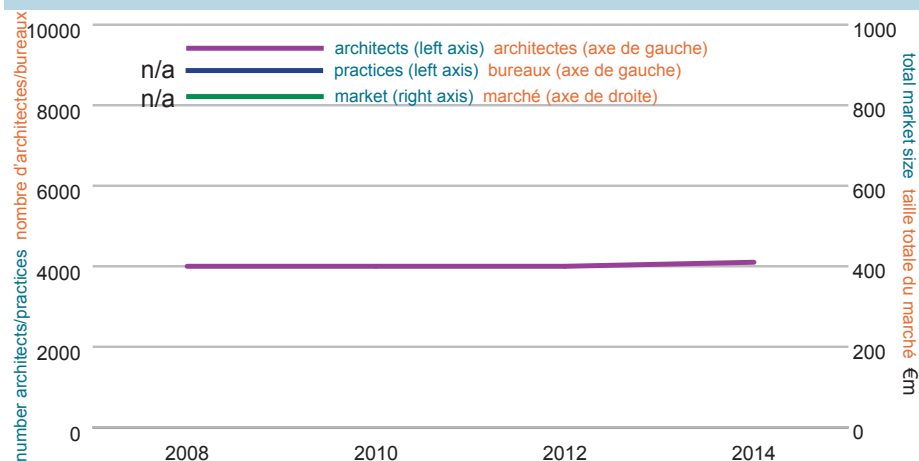
Architectural Profession Profession d'architecte

	2008	2010	2012	2014
Architects Architectes	4 000	4 000	4 000	4 100
% Male Homme	n/a	n/a	67	n/a
% Female Femme	n/a	n/a	33	n/a
% <40 years <40 ans	n/a	n/a	27	n/a
Practices Bureaux	n/a	n/a	699	n/a

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

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

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

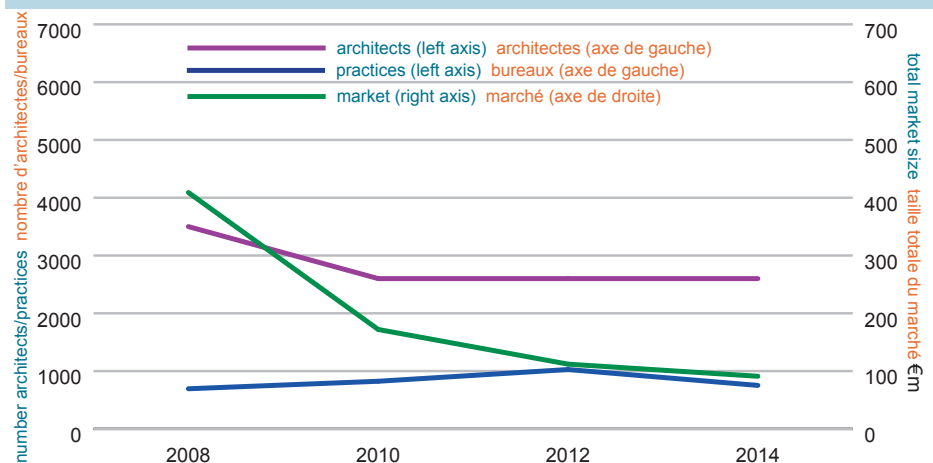
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Italy

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

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

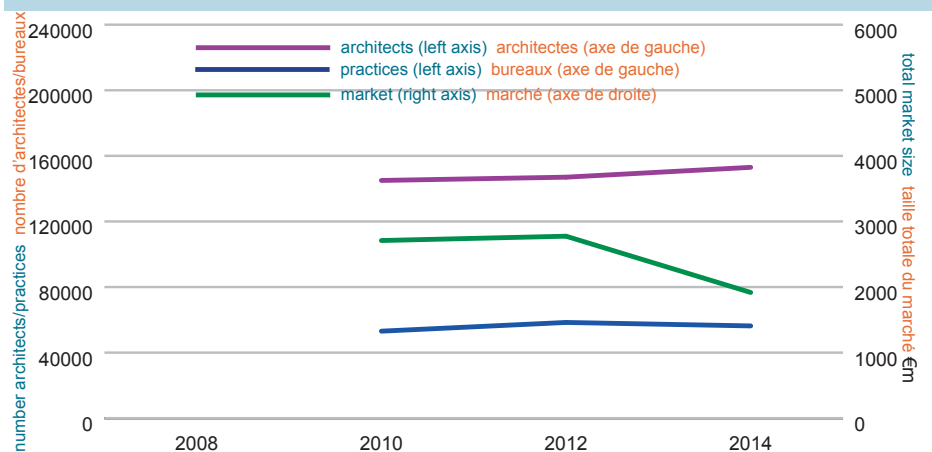
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Italie

Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

	2008	2010	2012	2014
Participants Répondants	n/a	124	14 004	8167
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-9%	+/- 0.8	+/- 1.1



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

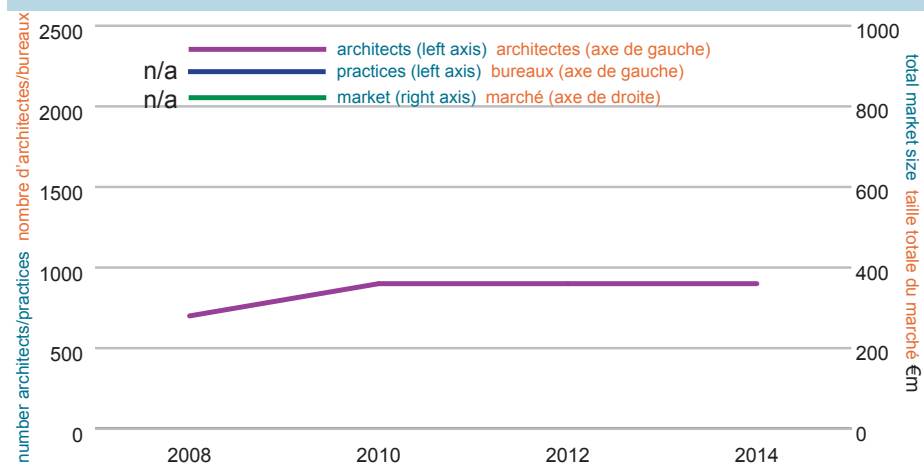
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

	Average earnings €* Revenu moyen en € *			
	2008	2010	2012	2014
Sole Principals Dirigeant unique	n/a	n/a	n/a	19 200
Partners & Directors Associé dirigeant	n/a	n/a	n/a	4 275
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	3 350
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	6 000
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	1 060
Other Public Autre – secteur public	n/a	n/a	n/a	n/a

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

Response Réponse

	2008	2010	2012	2014
Participants Répondants	n/a	5	n/a	36
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	+/-44%	n/a	+/- 16.0



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

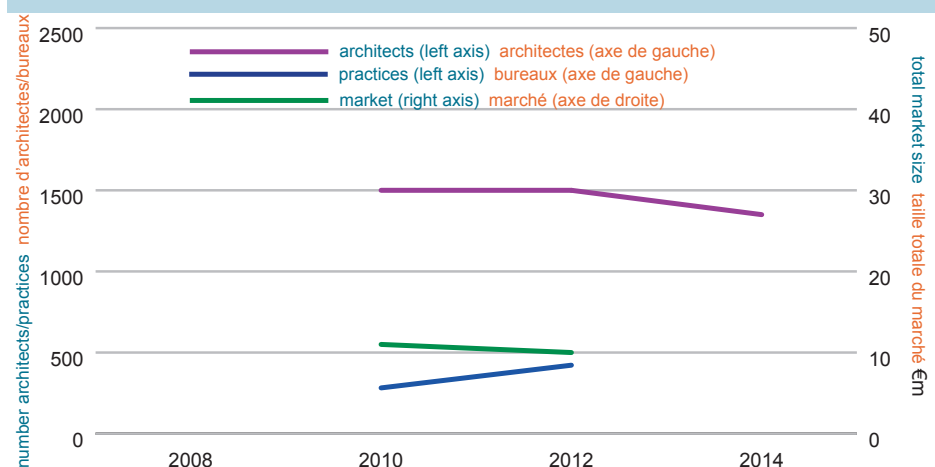
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

	Average earnings €* Revenu moyen en € *			
	2008	2010	2012	2014
Sole Principals Dirigeant unique	n/a	8 689	n/a	n/a
Partners & Directors Associé dirigeant	n/a	n/a	n/a	n/a
Private practice Salaried Salarié – Secteur privé	n/a	5 792	n/a	n/a
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	n/a
Other Private Autres – Secteur privé	n/a	n/a	n/a	n/a
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	n/a	6 951	n/a	n/a

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

Response Réponse

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



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

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

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

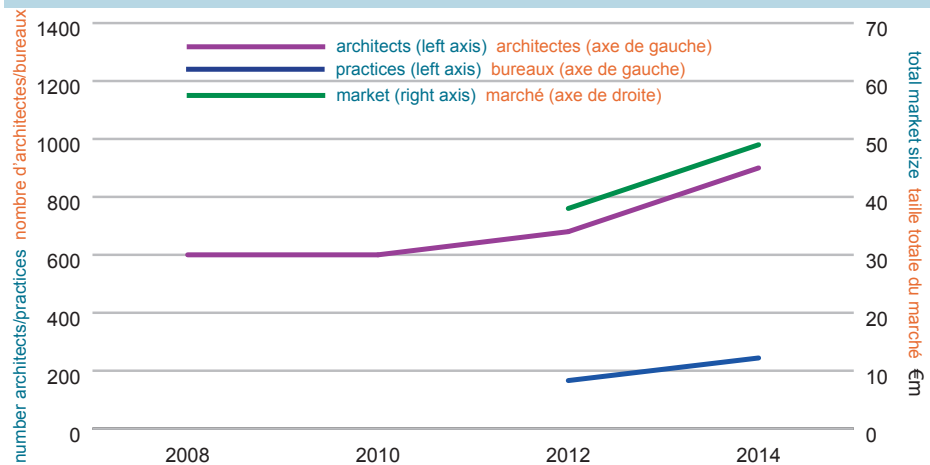
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

	Average earnings €* Revenu moyen en € *			
	2008	2010	2012	2014
Sole Principals Dirigeant unique	57 000	n/a	56 000	56 000
Partners & Directors Associé dirigeant	45 000	n/a	75 000	70 000
Private practice Salaried Salarié – Secteur privé	90 000	n/a	82 000	48 000
Private in-house L'industrie / commerce	n/a	n/a	31 000	n/a
Freelance Indépendant	50 000	n/a	50 000	57 000
Other Private Autres – Secteur privé	n/a	n/a	n/a	60 000
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	n/a
Other Public Autre – secteur public	50 000	n/a	56 400	n/a

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

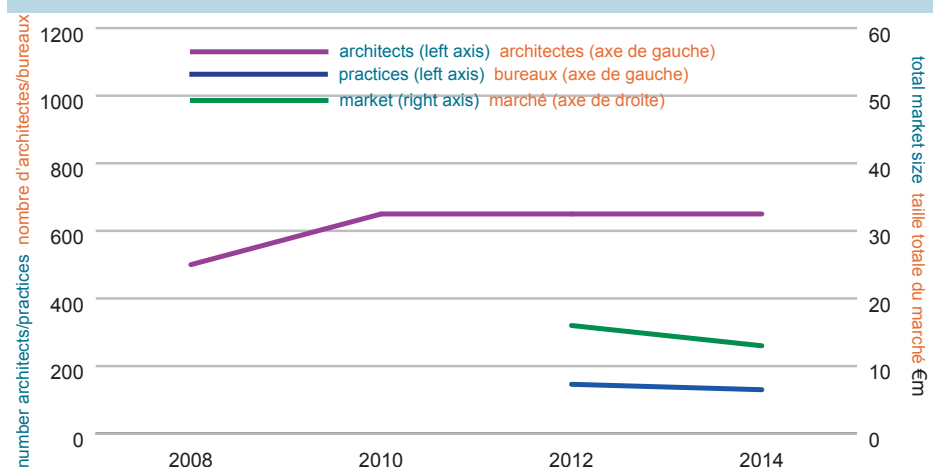
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

Architectural Profession Profession d'architecte

* 2012 / 2014: BNA Annual Benchmark Research

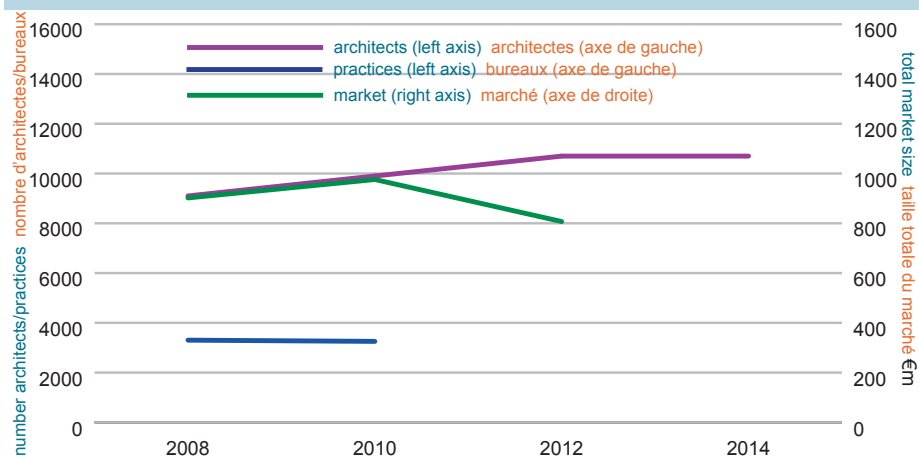
	2008	2010	2012*	2014*
Architects Architectes	9,100	9,900	10 700	10 900
% Male Homme	86	81	79	79
% Female Femme	14	19	21	21
% <40 years <40 ans	32	32	35	35
Practices Bureaux	3,304	3,255	n/a	3 714

Architectural Market Marché de l'architecture

* 2012 / 2014: BNA Annual Benchmark Research

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

Trends 2008-14 Tendances 2008-14



* 2012 / 2014: BNA Annual Benchmark Research

Field of Employment Domaine d'activité

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

Earnings Revenus

* 2012 / 2014: BNA Annual Benchmark Research

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

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

Response Réponse

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

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

Pays-Bas



MIRZA & NACEY RESEARCH

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

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

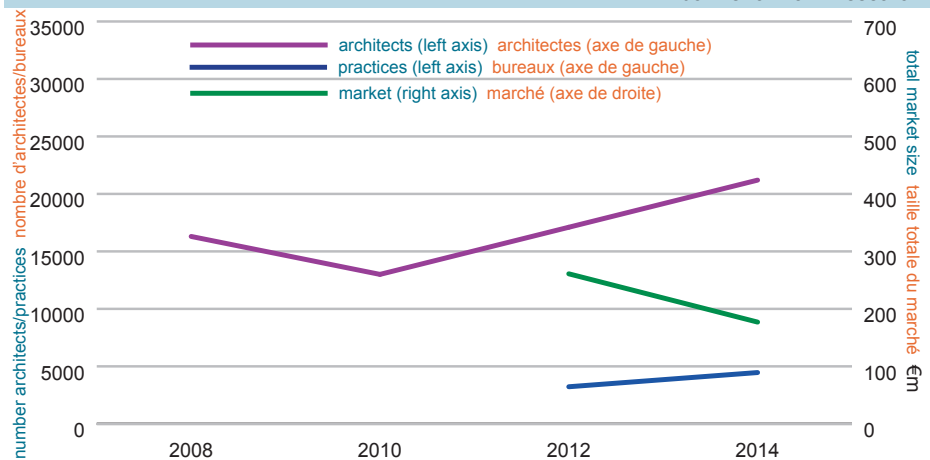
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14 * 2012 / 2014: BNA Annual Benchmark Research



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

	2008	2010	2012	2014
Participants Répondants	n/a	n/a	1,678	1836
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	+/- 2.2	+/- 2.2



MIRZA & NACEY RESEARCH



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

Romania

Roumanie

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

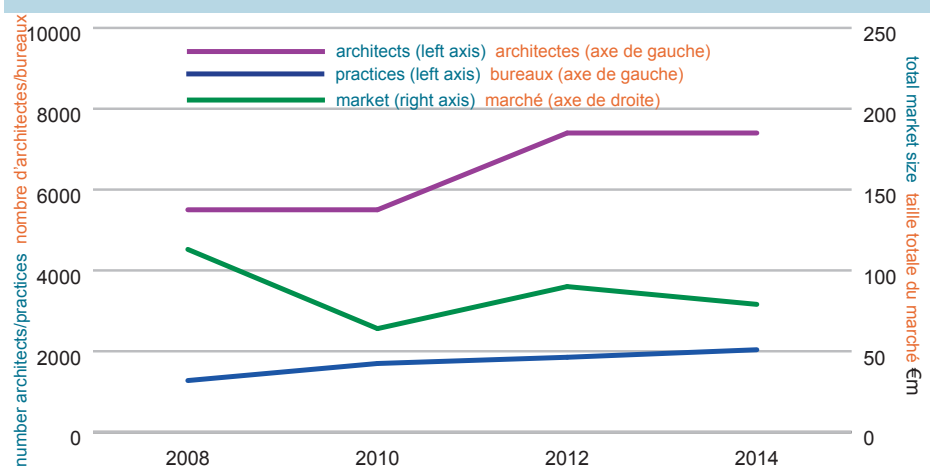
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Slovakia Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

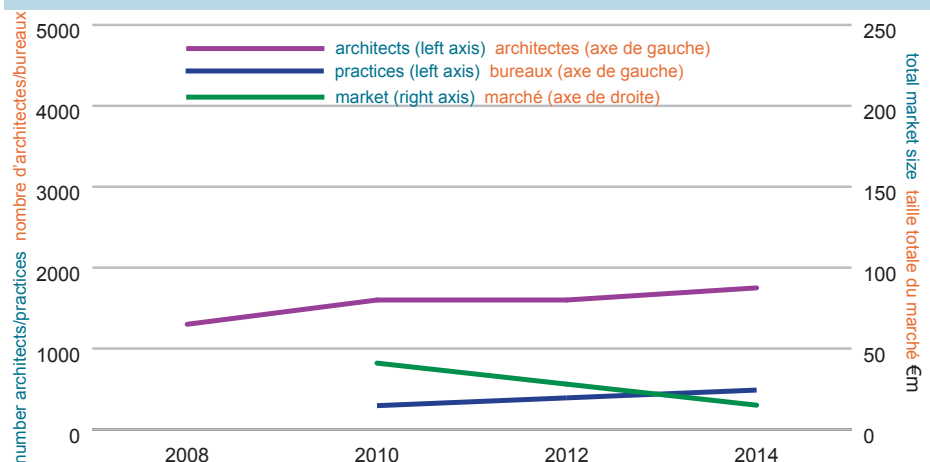
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

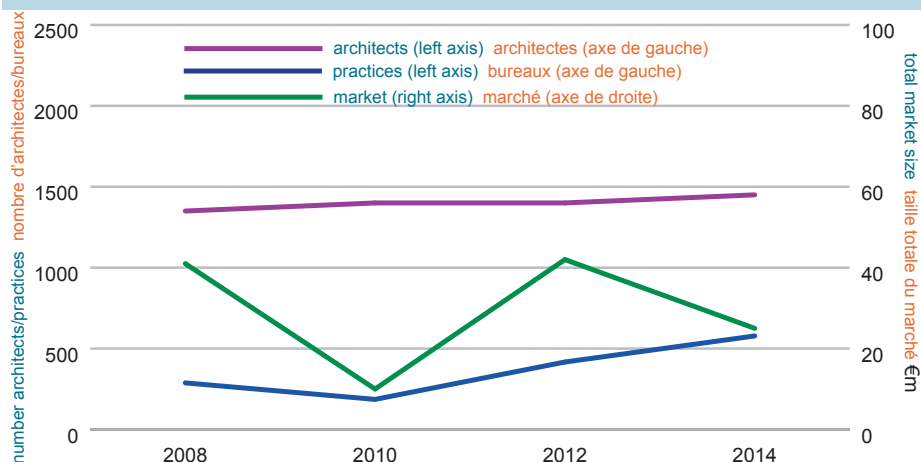
Architectural Profession Profession d'architecte

	2008	2010	2012	2014
Architects Architectes	1 350	1 400	1 400	1 450
% Male Homme	54	50	57	44
% Female Femme	46	50	43	56
% <40 years <40 ans	52	43	33	33
Practices Bureaux	288	186	417	578

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Spain

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

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

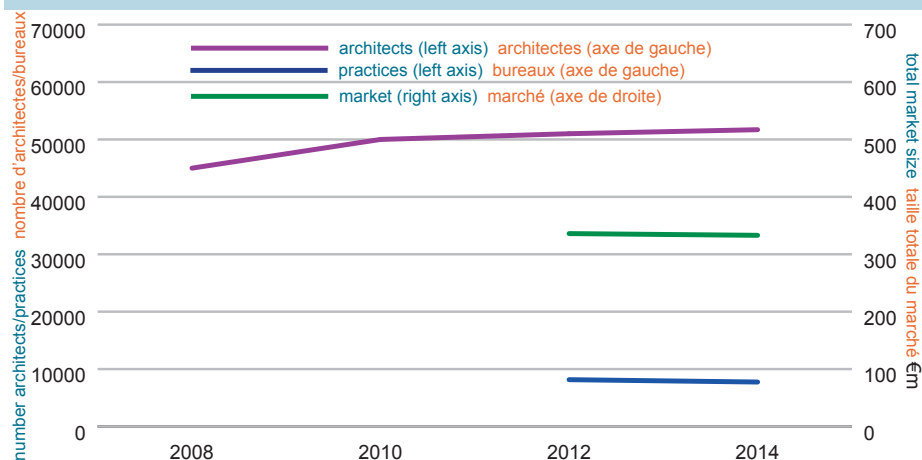
Architectural Profession / Profession d'architecte

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

Architectural Market / Marché de l'architecture

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

Trends 2008-14 / Tendances 2008-14



Espagne

Field of Employment / Domaine d'activité

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

Earnings / Revenus

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

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

Response / Réponse

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



MIRZA & NACEY RESEARCH

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

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

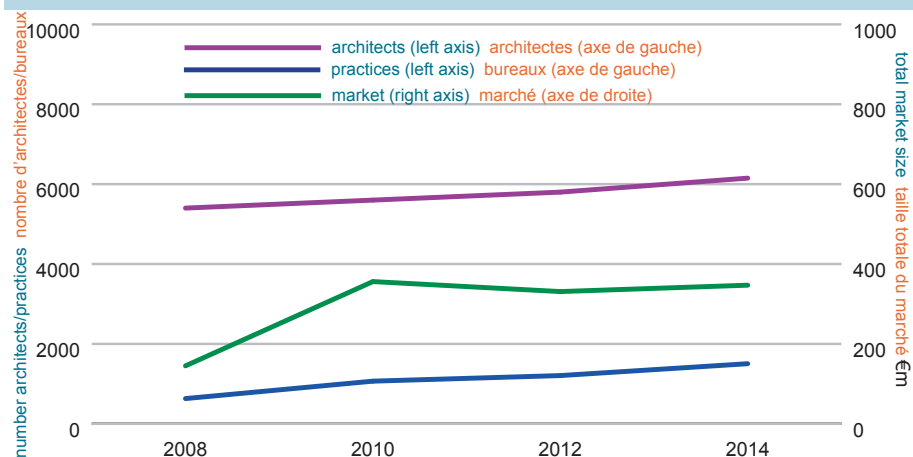
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

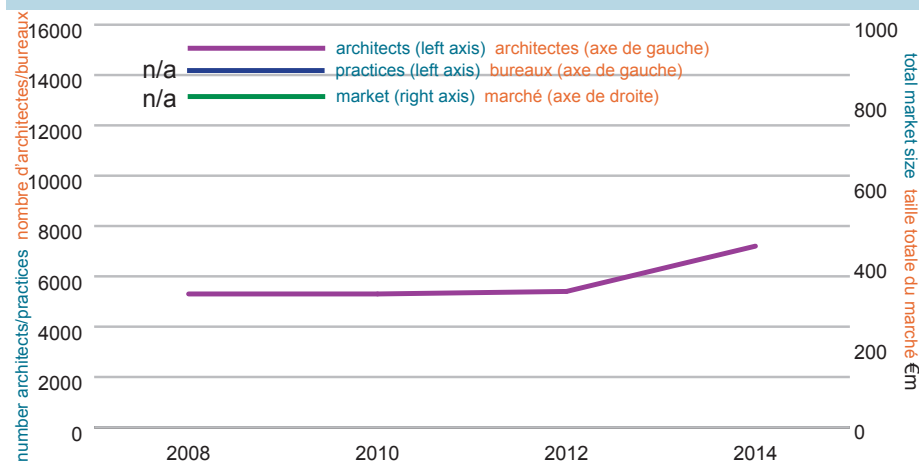
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

	Average earnings €* Revenu moyen en € *			
	2008	2010	2012	2014
Sole Principals Dirigeant unique	n/a	n/a	n/a	90 175
Partners & Directors Associé dirigeant	n/a	n/a	n/a	98 373
Private practice Salaried Salarié – Secteur privé	n/a	n/a	n/a	69 271
Private in-house L'industrie / commerce	n/a	n/a	n/a	n/a
Freelance Indépendant	n/a	n/a	n/a	59 024
Other Private Autres – Secteur privé	n/a	n/a	n/a	90 175
Local / central government Collectivité locale / gouvernement	n/a	n/a	n/a	111 489
Other Public Autre – secteur public	n/a	n/a	n/a	n/a

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

Response Réponse

	2008	2010	2012	2014
Participants Répondants	n/a	n/a	n/a	200
Accuracy of results 95% confidence Précision des résultats: 95% confiance	n/a	n/a	n/a	+/- 6.8



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

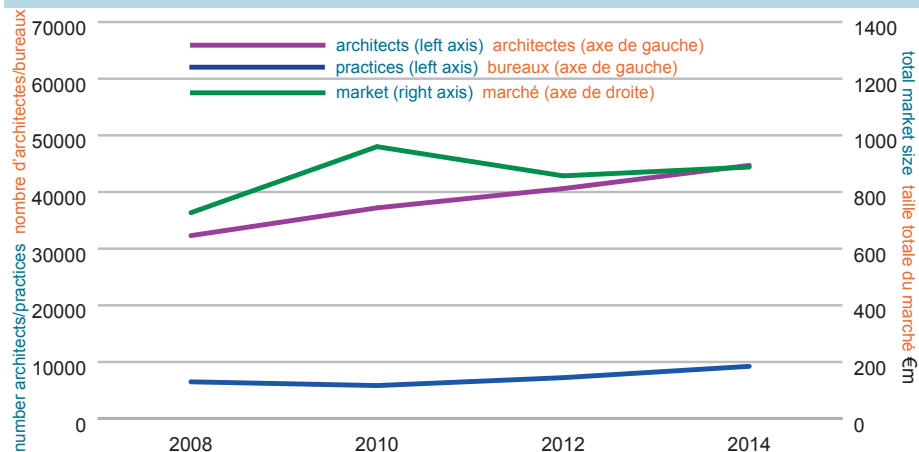
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



ARCHITECTS' COUNCIL OF EUROPE
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Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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

Turquie



MIRZA & NACEY RESEARCH

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

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

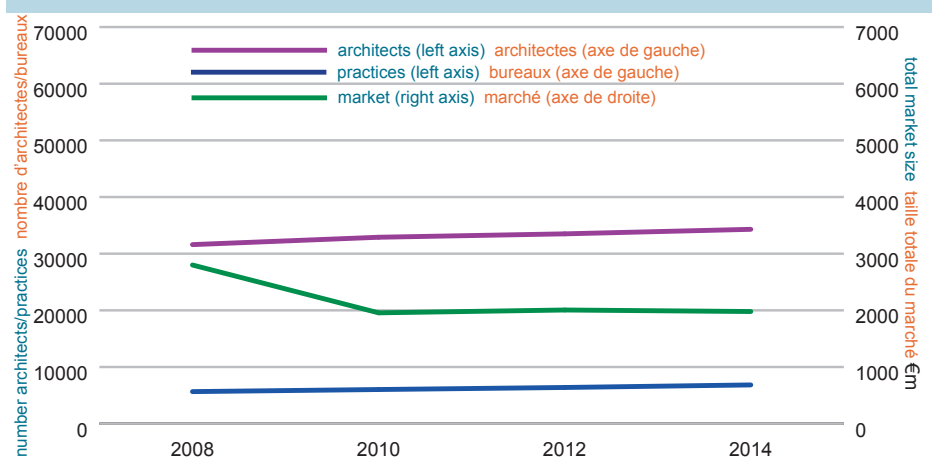
Architectural Profession Profession d'architecte

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

Architectural Market Marché de l'architecture

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

Trends 2008-14 Tendances 2008-14



Field of Employment Domaine d'activité

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

Earnings Revenus

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

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

Response Réponse

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

Royaume-Uni

A Appendix

A1 Survey Methodology

The 2014 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 regulatory 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 2014 were invited to participate and 26 countries participated.

It was with the direct cooperation of the Member Organisations of the ACE that it was possible to carry out the Study and the results obtained belong to them and to the ACE.

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

TABLE A-1
On-line survey response

	respondents to architect survey	respondents to principal survey	total number of replies	total contacted by email	response rate, %
Austria	13	237	250	2 904	8.6
Belgium	233	582	815	7 547	10.8
Bulgaria	36	47	83	2 600	3.2
Croatia	63	30	93	2 100	4.4
Czech Republic	4	9	13	n/a	n/a
Denmark	421	108	529	5 400	9.8
Estonia	6	14	20	127	15.7
Finland	291	120	411	2 000	20.6
France	183	507	690	18 216	3.8
Germany	979	413	1392	n/a	n/a
Greece	203	141	344	3 800	9.1
Ireland	111	156	267	2 036	13.1
Italy	3265	4902	8167	64 000	12.7
Latvia	18	18	36	786	4.6
Luxembourg	7	123	130	539	24.1
Malta	49	25	74	764	9.7
Netherlands	5	5	10	n/a	n/a
Portugal	1133	703	1836	n/a	n/a
Romania	76	169	245	992	24.7
Slovakia	195	221	416	985	42.2
Slovenia	21	32	53	n/a	n/a
Spain	167	478	645	43 000	1.5
Sweden	590	263	853	4900	17.4
Switzerland	67	133	200	7000	2.9
Turkey	390	215	605	31338	1.9
United Kingdom	269	197	466	16000	2.9
2014 EUROPE-26	8795	9848	18643	n/a	7.0*

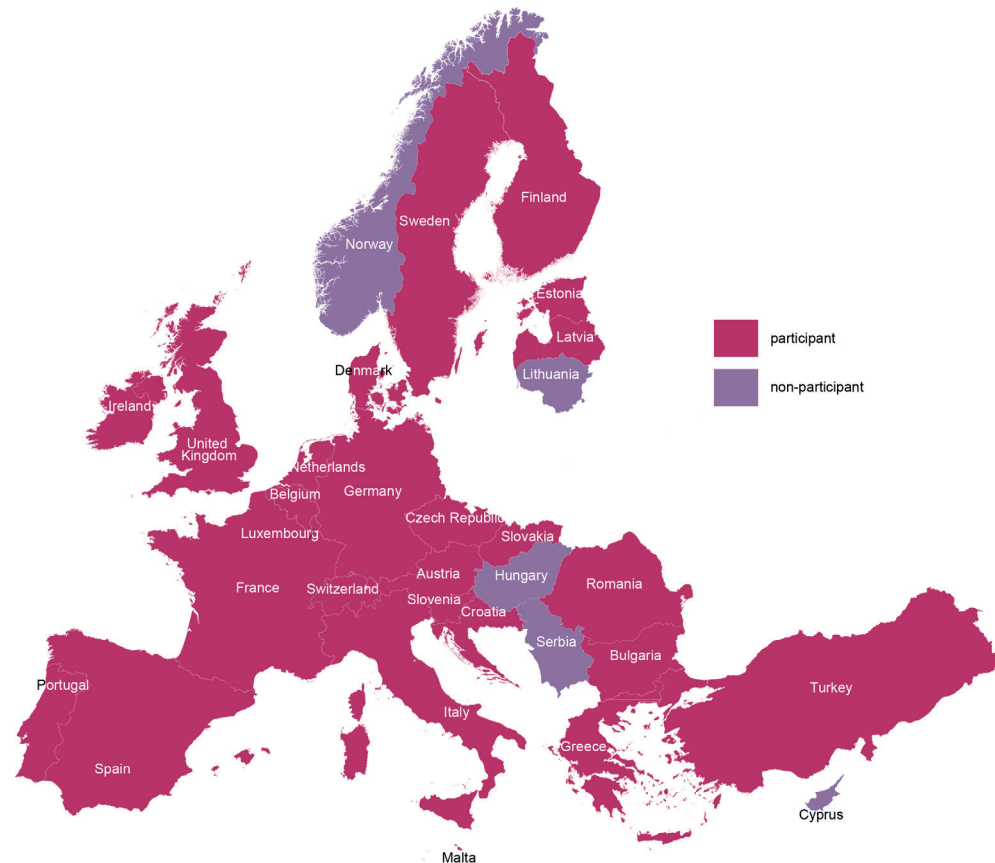
* per cent response amongst those countries where total number contacted by email was known

The Sector Study was aimed at 31 countries:

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

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'.

CHART A-1
Countries participating in the 2014 Survey



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 continues to be made available in a large number of 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 eighteen 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, a total of 18 643 architects replied. The response is considered satisfactory for the level of analysis undertaken. The statistical validity of these results is accurate to within + / - 0.7 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	6.0
Belgium	3.3
Bulgaria	10.6
Croatia	9.9
Czech Republic	27.2
Denmark	4.1
Estonia	21.7
Finland	4.5
France	3.7
Germany	2.6
Greece	5.2
Ireland	5.7
Italy	1.1
Latvia	16.0
Luxembourg	8.0
Malta	10.7
Netherlands	31.0
Portugal	2.2
Romania	6.2
Slovakia	4.2
Slovenia	13.2
Spain	3.8
Sweden	3.1
Switzerland	6.8
Turkey	4.0
United Kingdom	4.5
2014 EUROPE-26	0.7

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



A2 Definitions

Architects

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

Architectural students

Full-time or part-time students following a recognised course of architectural studies leading to a qualification listed in Annexe V7 of the Qualifications Directive (2005/36/EC).

Architectural Staff

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

Architectural Practices

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

Sole Principal

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

Revenue

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

Not Economically Active

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

Freelance Architect

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

Statistical Definitions

Confidence Level

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

Mean

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

Median

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

Quartile

An indication of the bottom or top quarter of the sample, calculated by placing all individual data in order of magnitude. The Lower Quartile is the

value one quarter of the way up and the Upper Quartile is the value three quarters of the way up this list of data. We have marked countries where accuracy is greater than plus or minus 10 with an asterisk, to denote caution when interpreting the findings. We generally avoid referring to these asterixed countries within the text commentary, although all countries are included in the charts and maps.



A3 Methodological Notes

1. Method for weighting the 'All' figure

The 'EUROPE-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. The raw survey data suggests 2 per cent of the profession is 'retired'. Experience in undertaking a regular survey of architects in the UK suggests retired architects are less likely to participate in on-line surveys. Whilst the survey was conducted amongst all members of participating institutes, including retired people, it is likely that retired people may not have felt the survey was relevant to them and declined to participate. It is also conceivable that the demographics of email addressees held are such that fewer retired architects may have

provided their email address to their institute in the first place, so any mailing based on email address alone may not have picked up sufficient numbers of retired architects. For these reasons we suspect the 'not economically active' figure is an under-estimate.

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

- (i) identify the number of economically active architects in each country – see item 2
- (ii) estimate the number of economically active architects who are in private practice: source - survey results
- (iii) estimate the number of architects working in each private practice size group and country: source - survey results
- (iv) calculate the average number of architects per practice by size group for each country: source - survey results
- (v) estimate the number of practices that each number of architects represents in each size group and country: source - survey results
e.g. if we have 300 architects working in the 3-5 size group for a given country and, from survey data, we know that, on average, 4 architects work in those practices we can estimate that there are 75 practices in this size group ie 300 architects working in practices comprising 4 architects gives us 75 practices.
- (vi) adding the number of practices in each size group gives the total number of practices per country

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

- (i) use the estimates of the number of practices in each size group (see note 4 above)
- (ii) multiply the number of practices by the average turnover for practices in that size group - repeat separately for each size group and each country
- (iii) each country's market size is calculated by adding together the values for each size group
- (iv) very occasionally the data is refined with reference to previous years' data

5. Minimum cell sizes

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