



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE



Mirza & Nacey Research

The Architectural Profession in Europe 2012

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Executive Summary

Survey now covers 95 per cent of the profession in Europe

This is the third biennial survey of architecture in Europe commissioned by the ACE. The data series is establishing itself, and year-on-year shows a consistent response profile from participants. This suggests that the data quality is good and can be viewed with increasing confidence. All large countries now participate, including, for the first time, Spain. The survey now covers 95 per cent of the profession in Europe, substantially up from the 53 per cent in 2008 and 84 per cent in 2010.

The profession continues to suffer from the economic crisis

The economic crisis throughout Europe has had a severe impact on architects. Between 2008 and 2012, construction output fell at a faster rate than GDP generally. The architectural market continues to contract at a greater rate than the fall in output. These worsening economic and market conditions have impacted on the profession's workload, salaries and profits: the proportion 'not working' has doubled, many more work part-time. Alongside this severe market slowdown the number of architects is growing. This creates an evident mis-match between demand and supply; more architects are chasing less work. The number of architects in Europe is now estimated to be 549,000; 13 per cent higher than in 2008.

But rates of decline are falling

There are signs that the situation is stabilising. The largest falls were recorded between the first two Surveys, in 2008 and 2010; the declines have been smaller between 2010 and 2012. Construction output, architectural market and practice revenue each recorded greater falls between 2008 and 2010 than between 2010 and 2012. Architects' earnings have almost stabilised. And architectural practice pre-tax profits have actually increased for all practice sizes.

Realisation of a 'new normal'

To get through this economic crisis, architects in Europe have lowered their expectations and adapted to the 'new normal'. Large practices have made deep cuts in their staff levels. But large practices are the only size of practice to have increased *both* revenues *and* profits since 2010. The shedding of staff from larger practices has contributed towards pushing the reported unemployment rate up from 3 per cent in 2008 to 6 per cent now. At the same time the number of 'micro' practices has increased, as newly redundant architects have set up new practices.

Architects cannot escape from the fundamental fact that there is less work around. More architects are now working part-time - up from 9 per cent in 2008 to 15 per cent. Sole Principals and Partners now work a shorter week, although salaried architects in private practice are working longer hours, probably as there are fewer of them. Practices report that more work is being undertaken 'at risk' with no fee. One of the biggest changes at a personal level has been an adjustment of retirement expectations - the economic crisis means architects will have to work longer before they can afford to retire. In 2008, 34 per cent said they planned to retire before the age of 65; this proportion has slipped to 18 per cent now. Conversely, 28 per cent said in 2008 they would work until they were at least 70 years old; this proportion has now increased to 49 per cent.

Europe has a north-south split

Now that this survey covers 95 per cent of Europe's architects, there is a noticeable north-south split. The extent to which architects have been affected by the economic crisis is very much greater in the south of Europe. In some northern and central European countries, construction output has started to rise again, while in much of the south, construction has not only fallen dramatically but continues to fall. Optimism for the future is highest in the north, and becomes progressively more pessimistic the further south one travels. In four of the southern European countries, more than half of respondents say they have "seriously" considered working in another European country.

Architect numbers and demography

The total number of architects in Europe-33 is estimated to be 549,000. The number continues to grow, and is 5 per cent higher than in 2010. This compares with a rise in the general population of Europe-33 of 1 per cent over the same period.

The proportion of architects who are women is 36 per cent. This is similar to the proportion in 2008 but higher than in 2010, probably due to sampling reasons. There are larger numbers of women amongst the younger age groups than older ages.

The age profile of architects has changed very little between the surveys, with a skew towards younger ages: 40 per cent are aged under 40. This implies the profession will continue to grow.

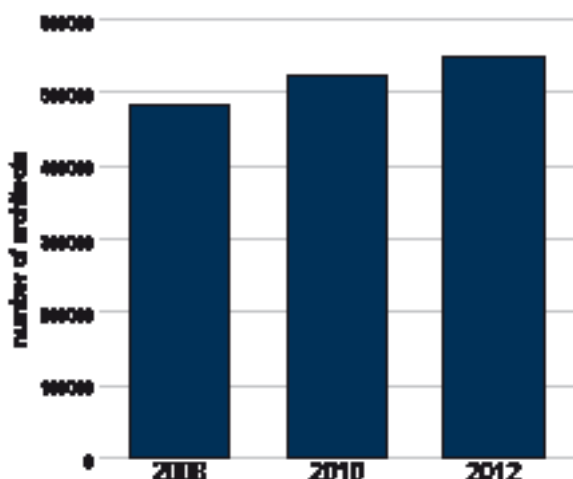


CHART S-1 The estimated number of architects in Europe continues to grow, up by over 5 per cent in 2010 to 2012. The larger increase in 2008 to 2010 is partly due to refining the methodology.

Field of employment

The majority of the profession continues to work in private practice. The largest single employment sector is Sole Principals, which at 32 per cent is higher than in 2008 but less than in 2010. The proportion of architects working as agency or freelancers has increased in 2012 to 18 per cent from 15 per cent in 2008 and 2010. The public sector accounts for 10 per cent, down from 12 per cent in 2008.

Cross-border working

A very small proportion of architects work in another European country: 3 per cent. This is the same as in 2010. But many more, 35 per cent,

have 'seriously considered' working in another country in the last 12 months. The biggest concerns about working in another country are practical, relocation or personal issues (66 per cent say these are barriers) although more than one third have insufficient language skills or insufficient knowledge of local planning or building regulations.

Market Context

Construction output in Europe continues to decline, down by an estimated 3 per cent between 2010 and 2012. This comes on top of a decline of 13 per cent between 2008 and 2010.

Architectural Market

The architectural market in Europe is estimated to be worth €15 billion. The market is estimated to have fallen at a faster rate than construction output, contracting by 11 per cent between 2009/10 and 2011/12 and by 32 per cent in total over the last four years.

Reliance on private housing is even greater than in 2008 or 2010; 42 per cent of architects' market comprises individual houses, up from around 30 per cent in both 2008 and 2010. Private developer housing is down, from 14 per cent in both 2008 and 2010 to 9 per cent now. The share of work accounted for by the public sector has shrunk, from 26 per cent in 2010 to 20 per cent in 2012.

Although building design is the dominant service offered, accounting for 50 per cent of work, it is down from 66 per cent in 2008. This is evidence of diversification as architects broaden the services offered.

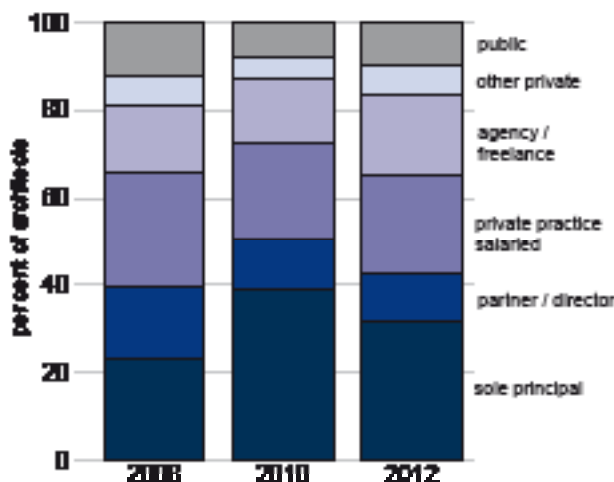


CHART S-2 Profile of architects shows more Sole Principals in 2012 and 2010 compared with 2008.

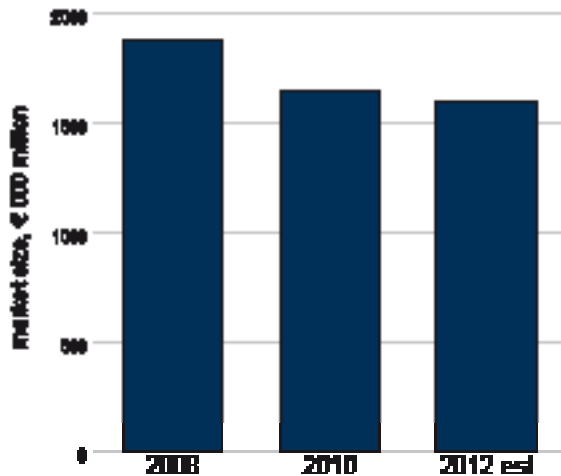


CHART S-3 Above: Construction output has fallen by an estimated 3 per cent between 2010 and 2012, on top of the 13 per cent fall 2008-10.

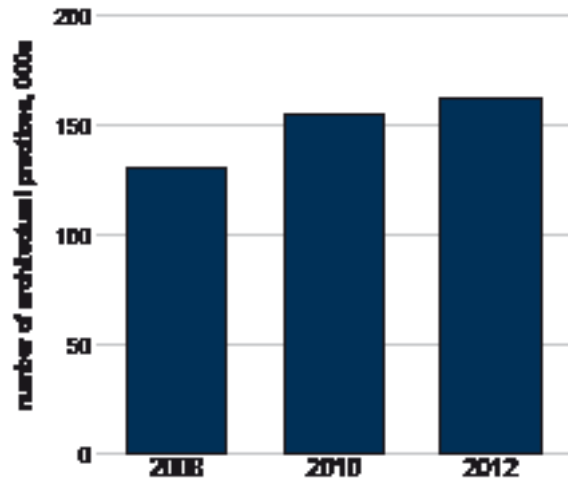


CHART S-5 Above: the estimated number of architectural practices continues to increase, largely as a result of more micro practices (1 or 2 person) being established during the recession.

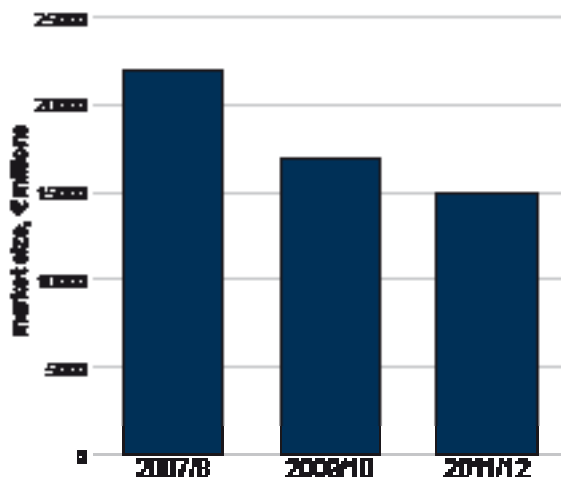


CHART S-4 The architectural market has fallen by an estimated 11 per cent between 2010 and 2012, following a fall of 22 per cent between 2007/8 and 2009/10.

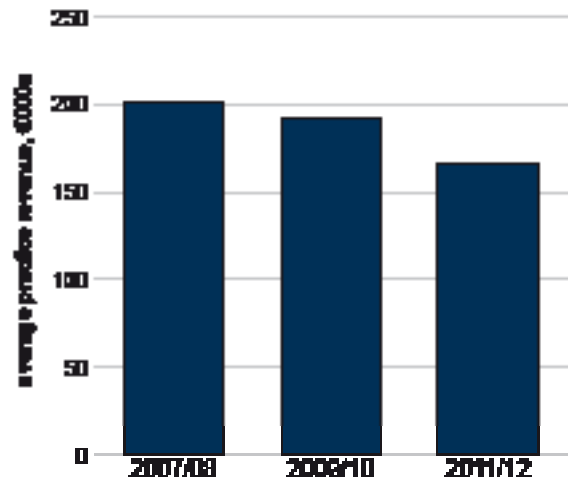


CHART S-6 Average practice revenue, per year, for a practice of size 3 to 5 staff. The fall was 3 per cent between 2008 and 2010 but 14 per cent between 2010 and 2012.

Architectural Practices

The number of architectural practices is estimated to have increased from 130,000 in 2008 to 155,000 in 2010, and now to 164,000 in 2012. This is a rise of 6 per cent since 2010 and is probably due to two factors: new practices being established by newly redundant architects, and an increase in the total number of architects in Europe.

The proportion of practices who describe themselves as 'independent architects' is sharply higher. In 2008 and 2010 just over 50 per cent were 'independent architects'; in 2012 the proportion is 67 per cent. The proportion of practices which are partnerships has halved since 2008 (18 per cent to 9 per cent).

Revenue

Average private practice revenue has fallen for small and medium sized practices in each survey since 2008. For example, the average revenue in a practice size of 6 to 10 staff fell by 7 per cent between 2008 and 2010 and by another 6 per cent between 2010 and 2012. Only in large practices have average revenues increased.

Practice profits

Pre-tax profits as a percentage of revenue fell between 2008 and 2010, but have increased between 2010 and 2012. Average profitability before tax shows this same pattern in all private practice size groups. The pre-tax profit levels recorded in 2012 are at least as high as in 2008 for 1 or 2 person firms, but are lower than 2008 levels for larger practices.

Hourly rates

Average hourly rates increased between 2008 and 2010 but have fallen in 2012. Over the four years, average rates charged by Principals are 13 per cent lower, architects are down by 12 per cent and technologists are 26 per cent lower.

Earnings

Average earnings have continued to edge lower. The Europe average in 2008, adjusted for PPP (Purchasing Power Parity), was €34,000; this fell to €29,500 in 2010, and is now just a shade lower at €29,000. Over the four years, 2008 to 2012, average earnings for Sole Principals have fallen by 23 per cent - a larger fall than the average for all architects. This reflects the growing number of architects setting themselves up as Sole Principals in the four years, up from 24 per cent to 32 per cent of the profession. Average earnings recorded by Freelance Architects are 33 per cent lower, Partners & Directors 9 per cent lower and Private Practice Salaried down by 7 per cent. Public sector salaries are 4 per cent lower over the four year period.

Male architects earn 43 per cent more than female architects, on average. Compared with 2010, average full-time male earnings have fallen by 4 per cent, while female earnings are 1 per cent lower.

Reputation

Architects feel they are less highly regarded by the general public now than in 2010 or 2008. Their own perception of how they are viewed has fallen from 37 per cent saying 'very' or 'highly' regarded in 2008 to 33 per cent. But perceived regard from clients has improved, from 48 per cent 'very' or 'highly' regarded in 2008 to 52 per cent in 2012.

Career Satisfaction

Architects are less satisfied than they were in 2008 and 2010. Satisfaction with choice of architecture as a career has slipped from a score of nearly 8 out of 10 in 2008 to 7 out of 10 now. Architects are slightly less satisfied now with all other measures - the business environment, quality of life and pay. The lowest absolute level of satisfaction continues to be pay, which scores an average 4.3 out of 10 (at least 0.3 points lower than in 2008 or 2010).

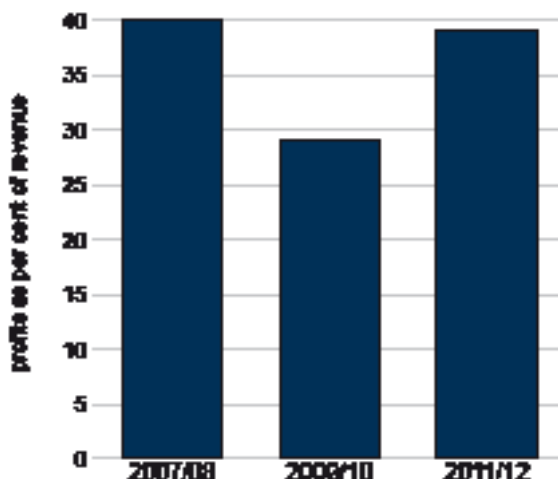


CHART S-7 Above: pre-tax profits as a per cent of revenue fell between 2007/8 and 2009/10 but have increased in 2011/12. This illustration is for medium sized practices (with between 3 and 5 staff).

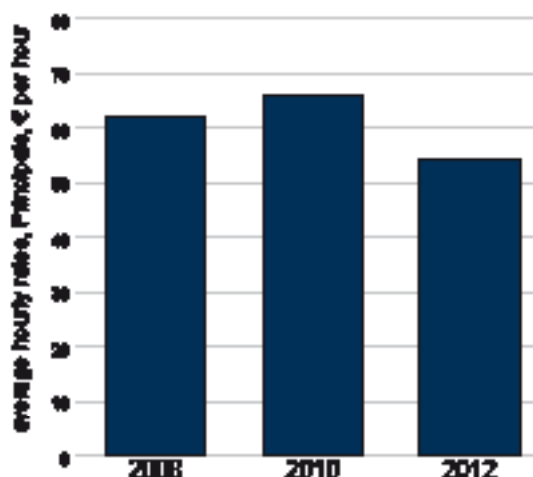


CHART S-8 Above: average hourly charge-out rates (adjusted for PPP) have fallen in 2012. The illustration shows average rates for Principals.

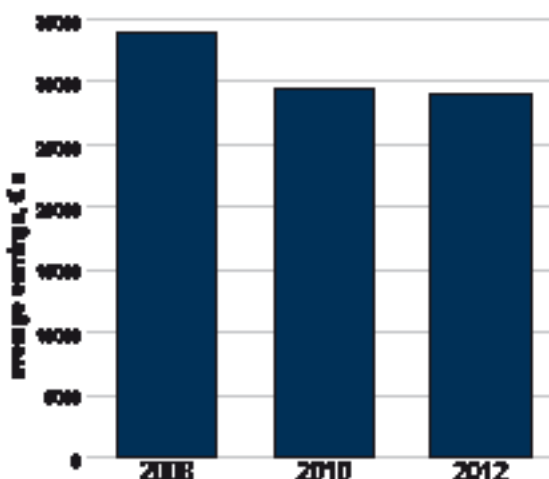


CHART S-9 Above: average earnings for all architects (adjusted for PPP) have fallen very slightly in 2012 after a substantial fall in 2008-10.

survey background

Introduction & Survey Methodology

The 2012 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 2008 and 2010 Sector Studies; the 2008 Study was the first comprehensive Study of the

architectural profession carried out in Europe. All 33 countries from which the ACE drew its membership at the time of the Study in 2012 were invited to participate and 25 countries fully participated with one further country partially participating. 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.

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	56	527	583	3406	17.1
Belgium	117	329	446	6374	7.0
Bulgaria	108	175	283	n/a	n/a
Croatia	255	168	423	2129	19.9
Czech Republic	188	258	446	3000	14.9
Denmark	558	185	743	5399	13.8
Estonia	16	35	51	154	33.1
Finland	280	104	384	2286	16.8
France	230	727	957	18216	5.3
Germany	423	417	840	n/a	n/a
Greece	269	221	490	3838	12.8
Hungary	105	86	191	n/a	n/a
Ireland	160	201	361	2300	15.7
Italy	5988	8016	14004	64230	21.8
Lithuania	9	13	22	n/a	n/a
Luxembourg	4	85	89	516	17.2
Malta	21	20	41	272	15.1
Poland	282	278	560	10272	5.5
Portugal	899	779	1678	15469	10.8
Romania	107	258	365	899	40.6
Slovenia	17	20	37	716	5.2
Spain	5	179	184	n/a	n/a
Sweden	1039	484	1523	5028	30.3
Turkey	553	357	910	26336	3.5
United Kingdom	982	846	1828	21936	8.3
EUROPE - 25	12671	14768	27439	192776	13.4

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 25 ACE

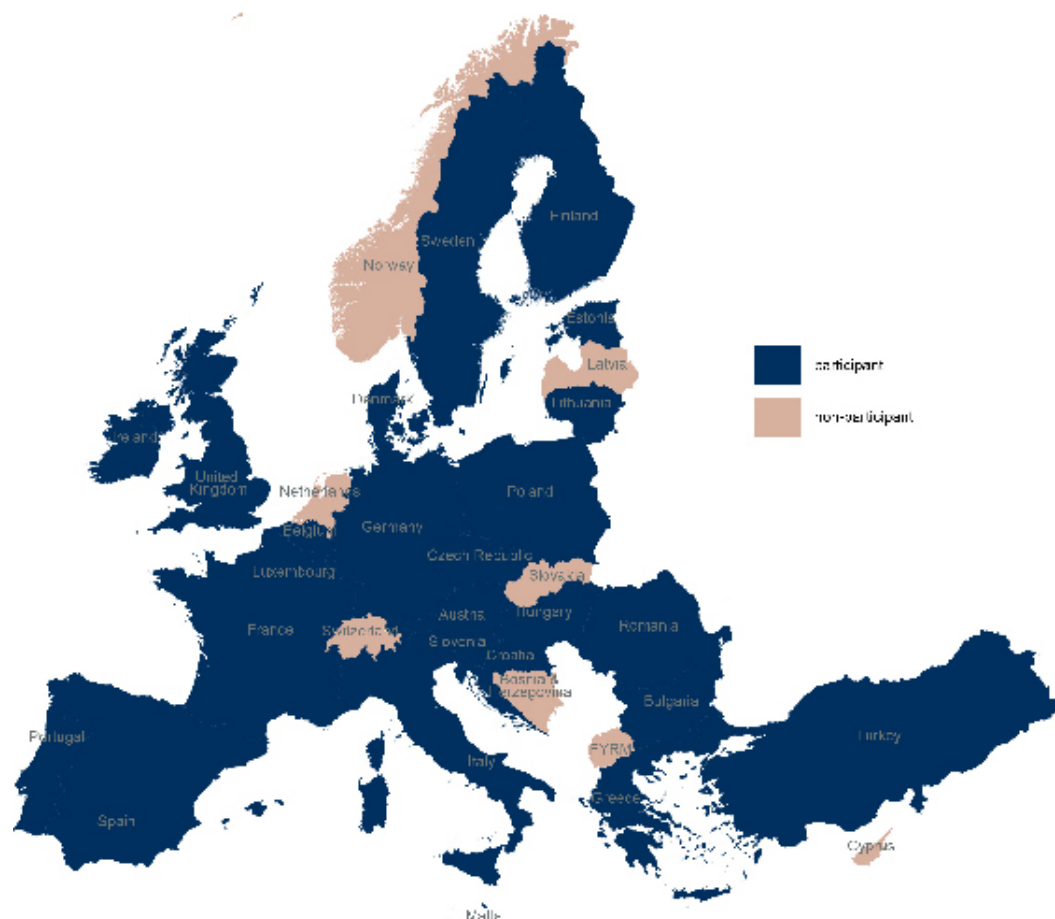
member countries. At least one Member Organisation in each of the 33 ACE member countries was invited to participate. This year the questionnaire was changed very slightly, with some additional questions and some removed. The number of language choices for respondents continues to grow; in 2008 five languages were offered, in 2010 there were fourteen; this time, respondents could choose from eighteen different languages into which the questionnaire had been translated: Bulgarian, Croatian, Czech, Dutch, Estonian, English, Finnish, French, German, Greek, Hungarian, Italian, Polish, Portuguese, Romanian, Spanish, Swedish and Turkish.

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

CHART A-1

Countries participating in the on-line survey



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.

There was one exception to this methodology. In Spain, 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 and the response rate suffered as a result.

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 25 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 27,439 architects replied. The overall response rate is 13 per cent. Compared with the 2010 survey, the number of countries fully participating grew from 23 to 25, and the total number of architects participating more than doubled (an increase of 177 per cent). Highest response rates achieved this year were in Romania, Sweden and Estonia (each over 30 per cent). The largest number of replies was from architects in Italy, the UK, Portugal and Sweden (over 1,000 responses from each country). Italy of course stands out this year with a huge response, accounting for half of respondents to the survey from all countries.

Italy also records a relatively high response rate (20 per cent). This is the first year in which Italy has fully participated in the survey.

The response is considered satisfactory for the level of analysis undertaken. The statistical validity of these results is tabulated on page 9; overall, the results are accurate to within ± 0.6 per cent at the 95 per cent confidence level. This is a higher degree of accuracy than the 2010 survey (which was accurate to within ± 1 per cent). The accuracy varies for each individual country and these \pm levels should be regarded very carefully when making comparisons between countries. Where the accuracy range is wider than ± 7 we have indicated with an asterisk that the data should be considered with caution.

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-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	3.8
Belgium	4.6
Bulgaria	5.5
Croatia	4.3
Czech Republic	4.3
Denmark	3.4
Estonia	13.1
Finland	4.7
France	3.1
Germany	3.4
Greece	4.4
Hungary	6.9
Ireland	4.8
Italy	0.8
Lithuania	20.7
Luxembourg	9.7
Malta	14.8
Poland	4.1
Portugal	2.2
Romania	5.0
Slovenia	15.9
Spain	7.2
Sweden	2.2
Turkey	3.2
United Kingdom	2.2
EUROPE - 25	0.6

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

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.

Accuracy of Results

The range of accuracy of the findings, at a given Confidence Level. So table A-2 shows that the 'Europe 25' totals are accurate to within plus or minus 0.6 per cent, at the 95% Confidence Level. This means for example that the proportion of architects who are women is quoted as being 36 per cent, but we can be 95% certain that the "true" figure lies between 35 and 37 per cent. The accuracy of results for each country differs. Taking Austria as an example, its results are accurate to within +/- 4 %. The quoted figure (table 1-2) is 18 per cent of architects are women, so we can be 95 per cent certain that the 'true' proportion of women architects in Austria lies between 14 and 22 per cent.

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.

Summary

number of countries in Sector Study: **33 = “EUROPE - 33”**

number of countries participated in on-line survey: **25 = “EUROPE - 25”**

total number of respondents to on-line survey: **27,439**

response rate: **13 per cent**

estimated number of architects in EUROPE - 33: **549,000**

estimated number of architects in EUROPE - 25: **519,000**

estimated size of construction industry in EUROPE - 33 (2011): **€1,657 billion**

estimated size of architectural market in EUROPE - 33 (2011/12): **€15 billion**

number of architectural practices in EUROPE - 33: **164,000**

The following statistics relate to **EUROPE - 25**:

average earnings of architects: **€29,000 (PPP)**

per cent women architects: **36 per cent**

per cent Freelance architects: **10 per cent**

per cent Sole Principals: **32 per cent**

per cent architects aged under 40: **40 per cent**

per cent architects aged 40 to 54: **39 per cent**

per cent architects aged 55 and over: **20 per cent**

per cent working or resident in the same country as they are registered: **97 per cent**

per cent who think architects are viewed ‘quite highly’ or ‘very highly’

by the general public: **33 per cent**

by clients: **52 per cent**

Summary: Top Five Countries

Largest number of architects

Italy	147 000
Germany	101,600
Spain	51,000
Turkey	40,600
UK	33,500

Base = EUROPE - 33

Largest architectural market

Germany	€4.2 billion
Italy	€2.8 billion
UK	€2.0 billion
France	€1.3 billion
Turkey	€857 million

Base = EUROPE - 33

Highest proportion male architects

Lithuania	86%
Austria	82%
United Kingdom	80%
Malta	76%
Spain	75%

Base = EUROPE - 25

Highest proportion female architects

Greece	59%
Croatia	55%
Bulgaria	55%
Sweden	51%
Finland	46%

Base = EUROPE - 25

Highest average earnings (adjusted for PPP)

UK	€48,000
Germany	€46,000
Luxembourg	€46,000
Denmark	€42,000
Austria	€42,000

Base = EUROPE - 25

Highest proportion of architects working outside own country

UK	15%
Ireland	13%
Portugal	9%
Poland	8%
Turkey	4%

Base = EUROPE - 25

Highest perception of reputation amongst the public

Denmark	66%
Sweden	54%
Poland	50%
Germany	46%
Finland	43%

(% rated very/quite highly)

Base = EUROPE - 25

Highest level of satisfaction

Denmark	8.0
Finland	7.6
Sweden	7.4
Czech Republic	6.5
Austria	6.1

(Quality of Life rating, 0 to 10)

Base = EUROPE - 25

Architects in Europe



The Sector Study was aimed at 33 countries:

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

The number of Architects in Europe

EUROPE - 33 has an estimated 549,000 architects. Over one quarter (27 per cent) of this number are from Italy (147,000 architects) while Germany accounts for 19 per cent of Europe's architects (101,600). Other countries with high numbers of architects are Spain (51,000), Turkey (40,600), the United Kingdom (33,500) and France (29,900).

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 (2.4 architects per 1,000 population), Denmark, Portugal, Malta, FYROM, and Greece (each records 1.5 architects per 1,000 population). The overall density of architects across Europe is 0.9 architects per 1,000 population. Lowest densities are recorded in Romania and Slovakia, where the density is 0.3 architects per 1,000 population.

The estimated number of architects is higher than the 2010 estimate of 524,000. The rise in the number of architects between the two years of 5 per cent compares with a rise of 1 per cent in the general population. Part of this rise is due to continued refining of the figures, but the rise can also be partly explained by increasing numbers of young architects entering the profession - while far fewer older architects retire.

In this report, when data refers to all of these countries it is labelled 'EUROPE - 33'.

Totals for countries that participated in the survey are labelled 'EUROPE - 25'.

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	4,600	8,443,018	0.5
Belgium	13,200	11,041,266	1.2
Bosnia & Herzegovina	3,000	3,839,265	0.8
Bulgaria	2,900	7,327,224	0.4
Croatia	2,250	4,398,150	0.5
Cyprus	900	862,011	1.0
Czech Republic	8,000	10,504,203	0.8
Denmark	9,800	5,580,516	1.8
Estonia	600	1,339,662	0.4
Finland	3,250	5,401,267	0.6
France	29,900	65,397,912	0.5
FYROM	3,000	2,059,794	1.5
Germany	101,600	81,843,743	1.2
Greece	16,400	11,290,785	1.5
Hungary	4,000	9,962,000	0.4
Ireland	2,600	4,495,351	0.6
Italy	147,000	60,850,782	2.4
Latvia	900	2,042,371	0.4
Lithuania	1,500	3,199,771	0.5
Luxembourg	680	524,853	1.3
Malta	650	420,085	1.5
Netherlands	10,700	16,730,348	0.6
Norway	3,600	4,985,870	0.7
Poland	13,700	38,208,618	0.4
Portugal	17,100	10,541,840	1.6
Romania	7,400	21,355,849	0.3
Slovakia	1,600	5,404,322	0.3
Slovenia	1,400	2,055,496	0.7
Spain	51,000	46,196,277	1.1
Sweden	5,800	9,482,855	0.6
Switzerland	5,400	7,952,555	0.7
Turkey	40,600	74,724,269	0.5
United Kingdom	33,500	62,989,550	0.5
EUROPE - 33	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 2012, 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 and 2012, we first attempted to verify all figures by looking at key sources including COAC and ArchiEuro, but these had not been updated since the 2008 Sector Study. Further verification has been undertaken using a mixture of primary and secondary sources including Member Organisations' websites and email contact with Member Organisations. Final figures are Mirza & Nacey best estimates based on these several different sources. All figures are 'latest available'.

* Some refinement of the estimate of the number of architects took place between 2008 and 2010 so the 2008 figure should be considered 'provisional'. Figures were further refined between 2010 and 2012.

CHART 1-1
Number of architects per 1000 population

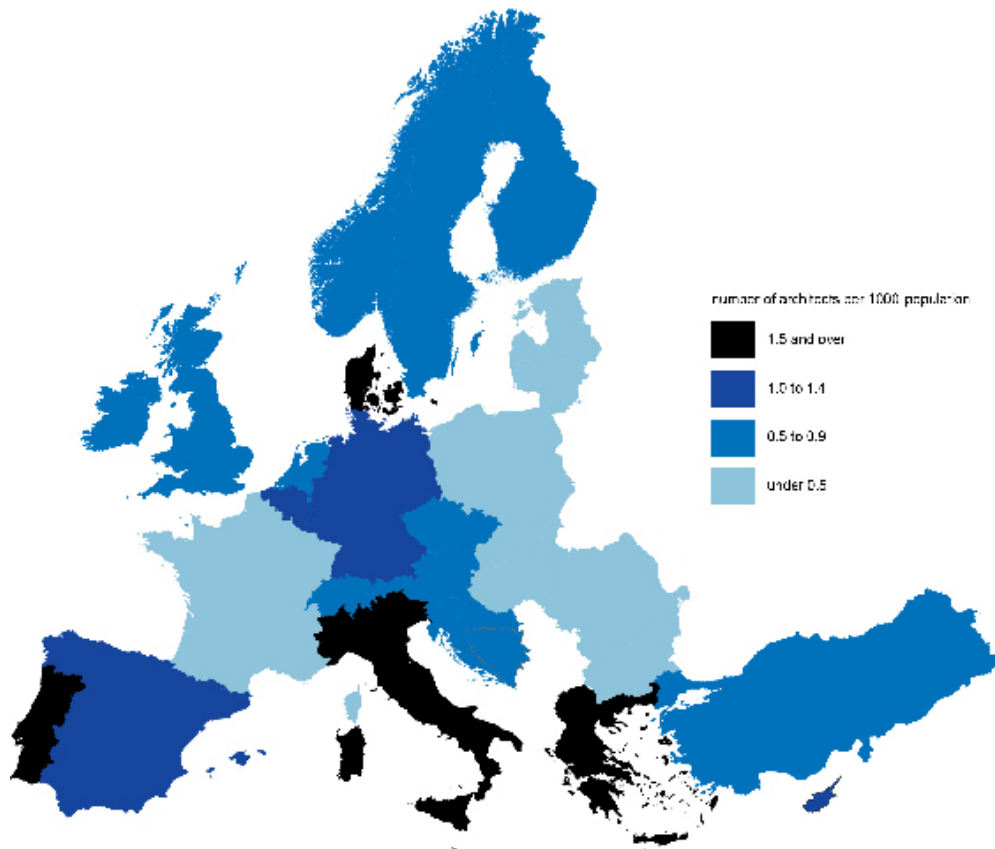


CHART 1-2
Estimated number of architects in each European country

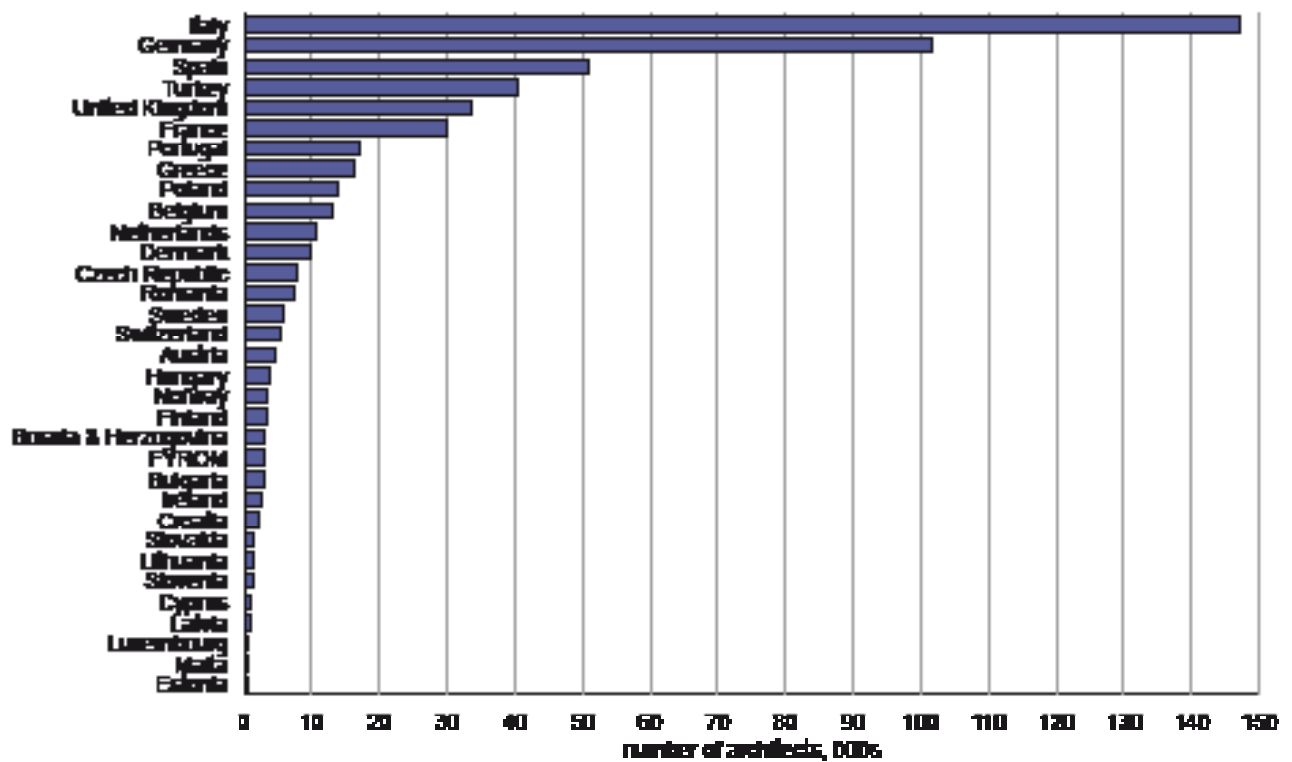
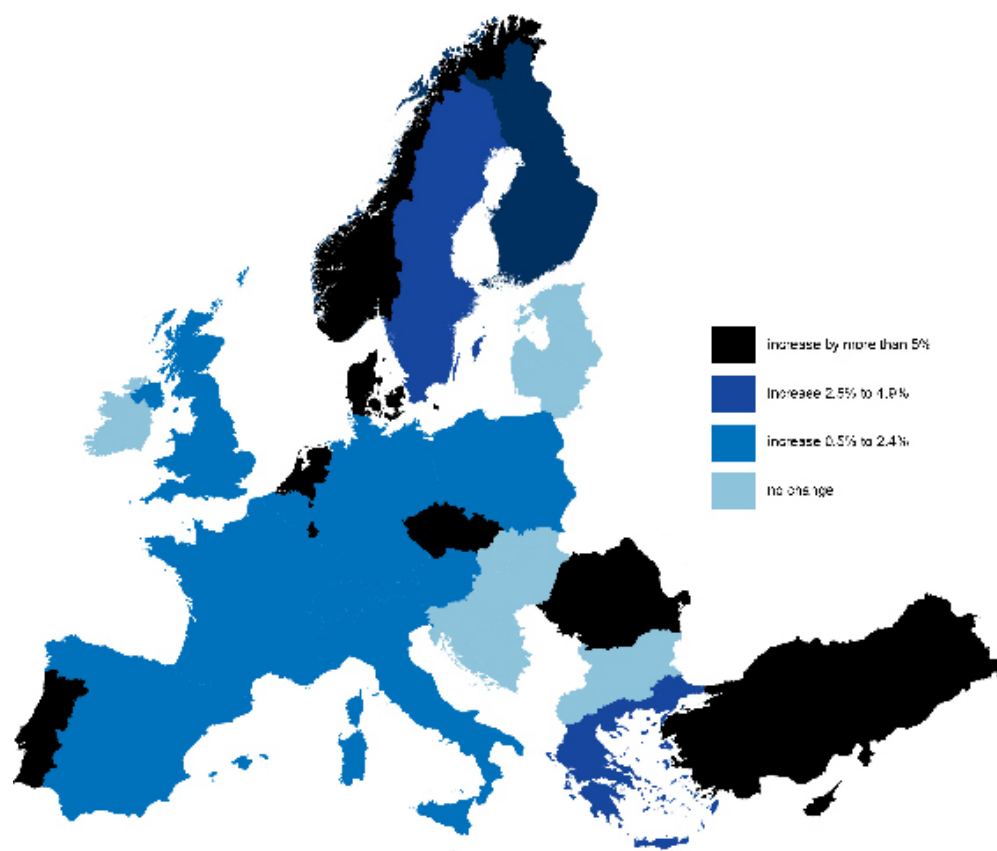


CHART 1-3
 Change in estimated number of architects by country, 2010 to 2012



Profile of Architects

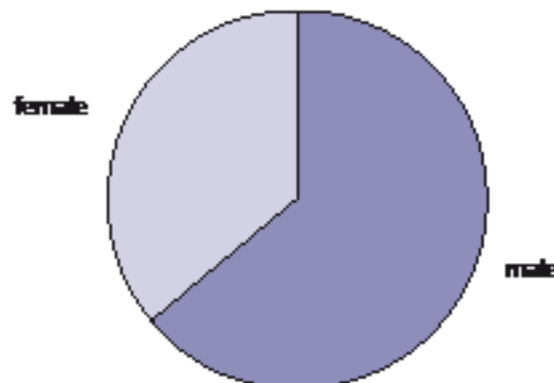
TABLE 1-2
Gender of architects analysed by country

per cent	gender of architects	
	male	female
Austria	82	18
Belgium	72	28
Bulgaria	45	55
Croatia	45	55
Czech Republic	68	32
Denmark	56	44
Estonia	69	31
Finland	54	46
France	67	33
Germany	64	36
Greece	41	59
Hungary	67	33
Ireland	69	31
Italy	63	37
Lithuania	86	14
Luxembourg	72	28
Malta	76	24
Poland	55	45
Portugal	56	44
Romania	56	44
Slovenia	57	43
Spain	75	25
Sweden	49	51
Turkey	55	45
United Kingdom	80	20
EUROPE - 25 **	64	36
2010 EUR- 23 **	69	31
2008 EUR-17**	63	37

* caution - small sample

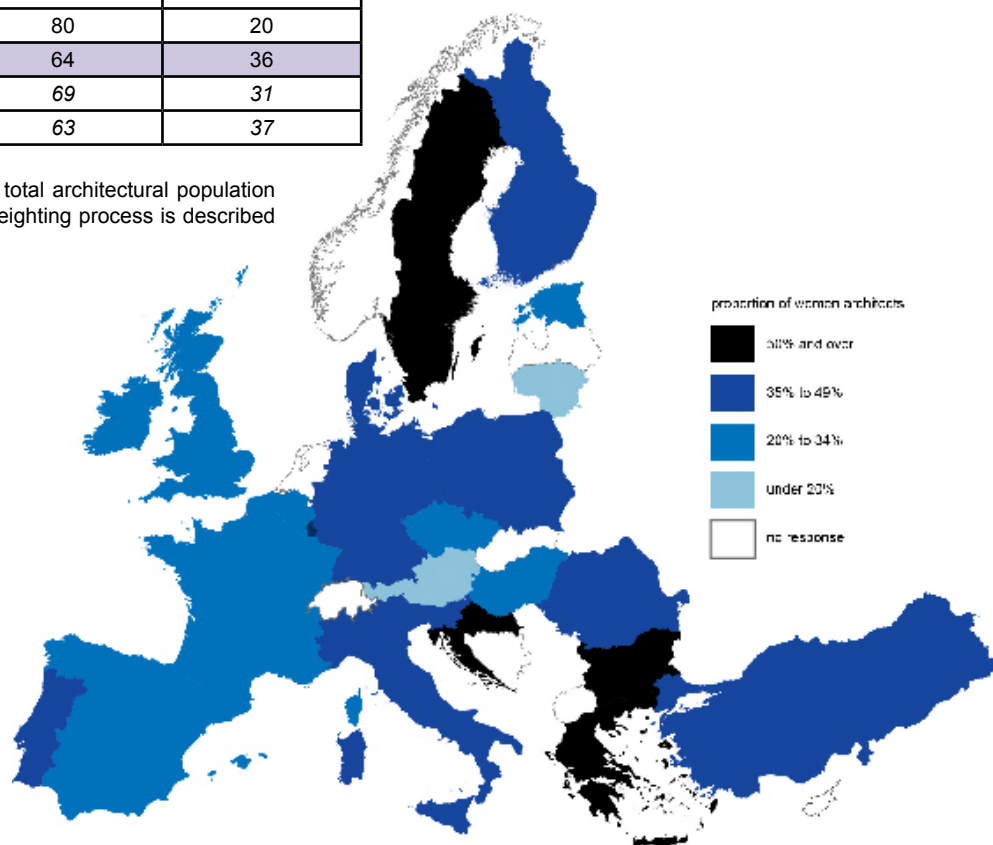
** weighted to reflect the total architectural population in all 25 countries. The weighting process is described in Appendix I.

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



Sixty four per cent of the profession in Europe is male, 36 per cent female. The most male dominated are Lithuania and Austria, each with over 80 per cent males, while in the United Kingdom, Malta and Spain male architects account for at least 75 per cent of the profession. The highest proportion of architects who are women is found in Bulgaria, Croatia, Greece and Sweden; in these countries the majority of architects are women.

CHART 1-5
Proportion of women architects



Employment Status

TABLE 1-3
Employment status of architects analysed by country

per cent	working full-time	working part-time	not working	retired
Austria	86	10	1	2
Belgium	94	4	0	1
Bulgaria	71	20	5	3
Croatia	97	2	1	0
Czech Republic	77	11	4	8
Denmark	78	10	7	5
Estonia *	84	14	0	2
Finland	89	8	3	0
France	92	7	1	1
Germany	80	15	2	2
Greece	67	22	10	1
Hungary *	69	9	7	15
Ireland	70	20	9	1
Italy	72	19	7	2
Lithuania *	95	5	0	0
Luxembourg *	91	7	0	2
Malta *	93	7	0	0
Poland	82	11	3	5
Portugal	67	12	20	0
Romania	77	14	3	6
Slovenia *	86	8	5	0
Spain *	61	23	16	0
Sweden	85	13	2	1
Turkey	84	9	4	3
United Kingdom	80	12	3	5
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 25/23/17 countries. The weighting process is explained in the Appendix.

CHART 1-6
Employment status of architects



Seventy six per cent of architects are working full-time, 15 per cent working part-time, and 6 per cent not working. The proportions who are working part-time and not working are higher than in 2010 or 2008.

Highest levels of reported unemployment or not working for other reasons are recorded amongst architects in Portugal, Spain and Greece. The highest levels of part-time employment are in Spain, Greece, Ireland and Bulgaria.

In previous years 2010 and 2008, the original survey results were amended to take account of a perceived under-reporting of retired and not economically active respondents. This under-representation may still exist but the data - including back data - is no longer adjusted.

Field of Employment

CHART 1-7
Field of Employment

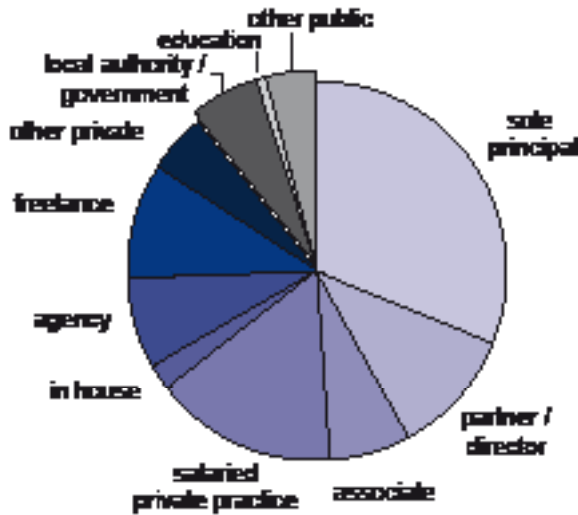


TABLE 1-4
Field of Employment of Architects

	per cent architects working
sole principal	32
partner / director	11
associate	7
private practice salaried	16
in - house	2
agency	8
freelance	10
other private	5
local authority - municipal	4
local authority - regional	1
central government	1
education	1
health	0
other public	3
EUROPE - 25 **	100

** weighted to reflect the total architectural population in all 25 countries.

The largest single group of architects describe themselves as Sole Principals (32 per cent). The highest proportions of Sole Principals are to be found in Austria (64 per cent) and Greece (56 per cent). Eleven per cent are Partners or Directors (highest proportions in Lithuania, the United Kingdom, Ireland, Austria and Luxembourg), while 16 per cent are salaried architects working in private practice (highest proportion of around 40 per cent in Turkey and Finland).

Ten per cent describe themselves as 'Freelance' architects, and another 8 per cent as Agency. At least 20 per cent of architects in Belgium, Czech Republic and France are Freelance while Agency accounts for at least 20 per cent

of architects in Spain, Belgium, France and Romania.

The proportion of architects working in the public sector is 10 per cent, half of those work for local government at either municipal or regional level. Denmark has the highest proportion of architects working for local authorities (21 per cent), along with Finland and Sweden (19 per cent). Denmark and Sweden also have the highest proportions of architects working in central government (4 per cent, compared with a Europe average of 1 per cent), as well as Malta (but small sample size).

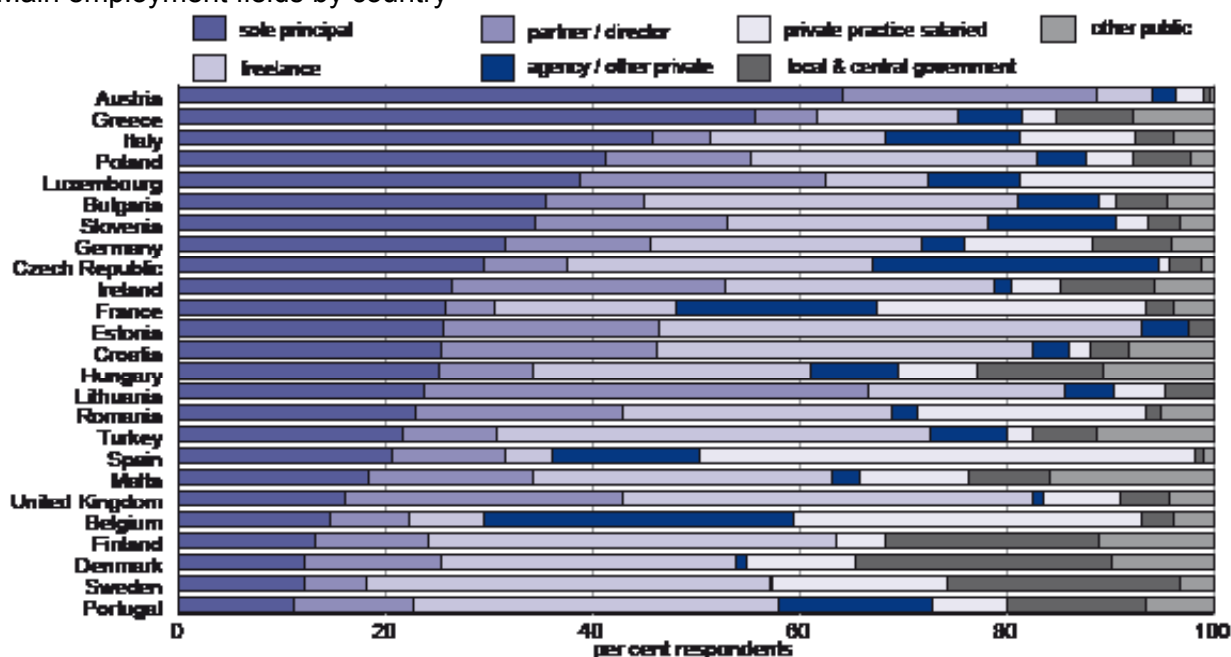
TABLE 1-5
Architects' field of employment by country

per cent	sole principal	partner / director	associate	private practice salaried	in-house	agency	freelance	other private	local authority	central govt	education	other public
Austria	64	25	1	4	0	0	2	2	1	0	0	0
Belgium	15	8	6	2	0	32	30	1	3	0	0	3
Bulgaria	36	10	12	24	1	0	8	1	5	0	2	3
Croatia	25	21	4	32	0	1	3	1	4	0	3	5
Czech Republic	30	8	13	16	0	0	27	1	3	0	1	1
Denmark	12	13	3	26	2	2	1	6	21	4	7	2
Estonia *	26	21	28	19	0	0	5	0	2	0	0	0
Finland	13	11	1	39	1	1	0	2	19	2	4	7
France	26	5	13	4	0	24	20	2	3	0	0	3
Germany	32	14	1	25	7	1	4	5	8	0	1	3
Greece	56	6	9	4	0	2	6	2	5	2	2	6
Hungary *	25	9	11	15	5	0	8	3	11	2	5	5
Ireland	26	26	7	19	0	2	2	3	6	3	2	4
Italy	46	6	11	6	2	0	13	9	4	0	1	3
Lithuania *	24	43	10	10	0	0	5	5	5	0	0	0
Luxembourg *	39	24	9	1	0	19	9	0	0	0	0	0
Malta *	18	16	5	24	0	0	3	11	0	8	0	16
Poland	41	14	3	25	2	1	5	2	5	0	1	1
Portugal	11	12	3	33	1	2	15	3	12	1	3	4
Romania	23	20	6	20	1	20	3	2	1	0	3	2
Slovenia *	34	19	6	19	0	0	13	3	3	0	3	0
Spain *	21	11	4	1	0	44	14	4	1	0	0	1
Sweden	12	6	8	31	1	15	0	1	19	4	2	1
Turkey	22	9	2	40	0	1	7	1	5	2	5	6
United Kingdom	16	27	12	27	2	1	1	5	3	1	2	2
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

** weighted to reflect the total architectural population in all 25 countries.

CHART 1-8
Main employment fields by country



Years Qualified as an Architect

TABLE 1-6

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	3	11	12	18	15	15	22
Belgium	6	7	11	15	16	9	8	29
Bulgaria	2	4	13	13	12	9	7	40
Croatia	6	6	16	15	21	12	9	15
Czech Republic	0	0	5	11	17	10	9	48
Denmark	4	3	8	10	14	12	12	37
Estonia *	0	0	2	2	6	12	22	57
Finland	2	3	6	9	19	14	14	33
France	4	4	12	12	14	12	13	30
Germany	1	2	12	14	19	12	15	24
Greece	3	6	21	22	10	6	8	25
Hungary *	2	2	3	9	15	12	12	45
Ireland	0	1	6	12	19	18	12	32
Italy	2	3	11	17	23	13	11	19
Lithuania *	5	0	0	9	14	14	5	55
Luxembourg *	0	1	9	15	27	16	4	28
Malta *	0	7	24	7	17	12	7	24
Poland	0	0	10	19	22	11	8	28
Portugal	5	7	23	24	19	8	7	8
Romania	0	1	15	18	17	7	6	37
Slovenia *	0	0	8	14	31	17	11	19
Spain *	4	5	12	24	21	10	9	14
Sweden	2	4	11	14	17	10	9	34
Turkey	9	9	13	12	13	8	9	26
United Kingdom	3	3	7	9	14	11	11	42
EUROPE - 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

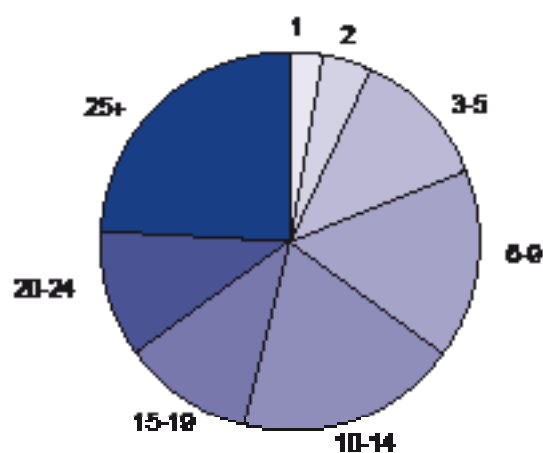
** weighted to reflect the total architectural population in all 25 countries.

About one quarter of architects (24 per cent) have been fully qualified as an Architect for 25 years or more. Another 22 per cent have been qualified for between 15 and 24 years; so approaching half the profession has been qualified for 15 years or more. Nineteen per cent of architects have been qualified for 5 years or less.

Highest levels of the most experienced architects are recorded in Estonia (57 per cent qualified for 25 years or more), Lithuania (55 per cent), Czech Republic (48 per cent) and Hungary (45 per cent). The highest proportion of architects qualified for five years or less are recorded in Portugal (35 per cent), Turkey (31 per cent), Malta (31 per cent) and Greece (30 per cent).

CHART 1-9

Number of years architects have been qualified



Age Profile of Architects

Forty per cent of the profession is aged under 40, 39 per cent is aged between 40 and 54, while 20 per cent is aged 55 and over. The age profile of the profession peaks at age 35 to 39, with numbers after this peak falling consistently as age increases. Highest levels of younger architects are recorded in Portugal,

Spain, Malta, Turkey, Greece, Luxembourg and Belgium, where more than 60 per cent of architects are aged under 45.

The age profile is younger for women than it is for men: 51 per cent of women are aged under 40, compared with 29 per cent of men.

CHART 1-10

 Age profile of architects

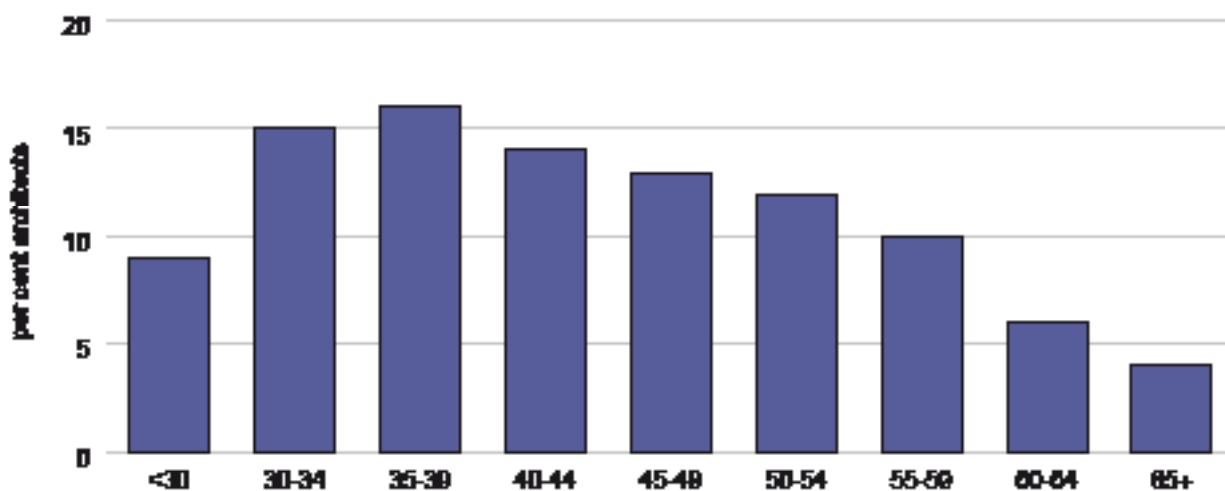


CHART 1-11

 Proportion of architects aged under 45

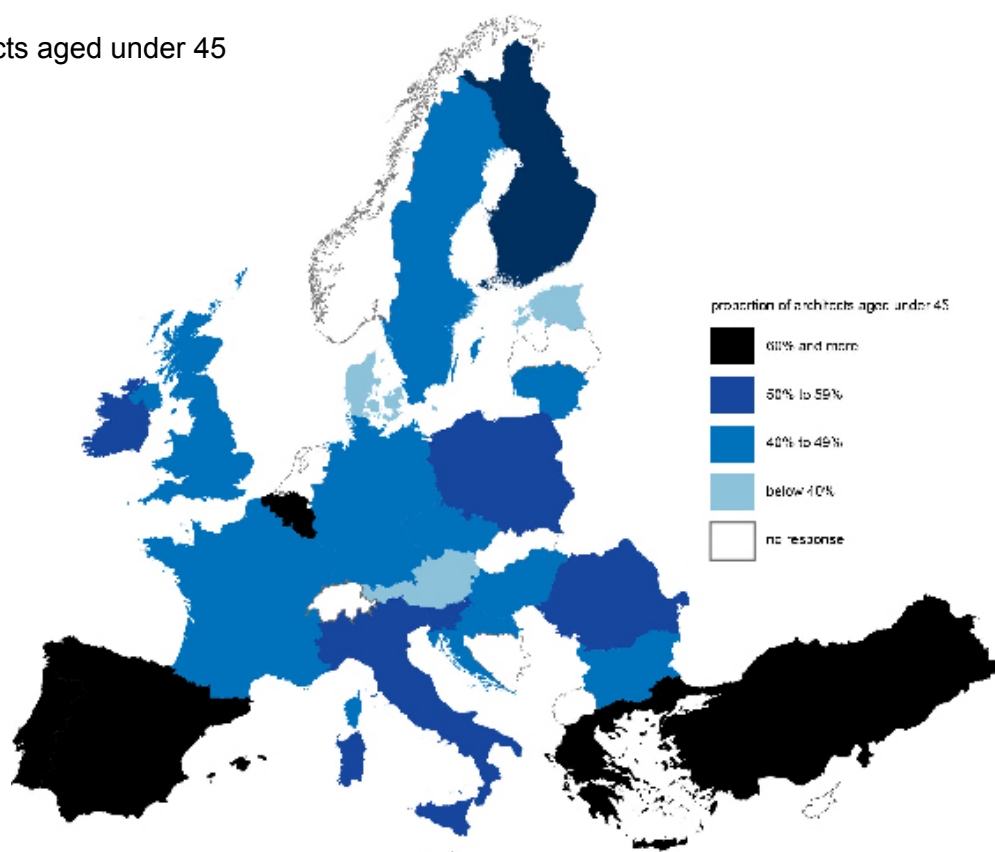


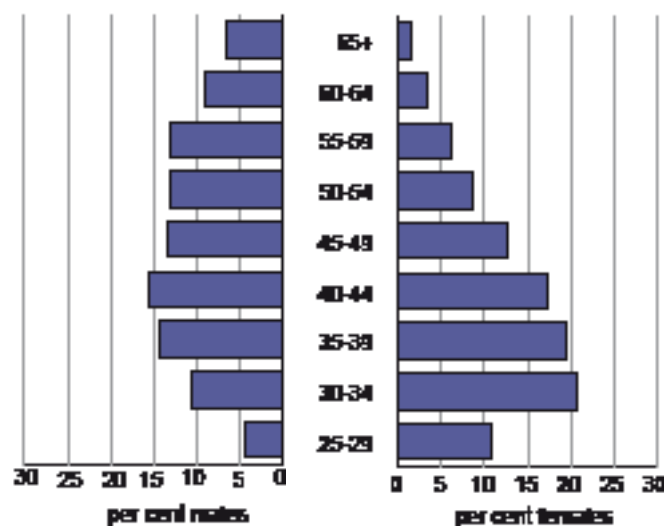
TABLE 1-7
Age of Architects analysed by country

per cent	age of architects								
	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	1	3	14	19	18	15	12	8	10
Belgium	22	16	16	9	7	12	8	5	5
Bulgaria	17	13	11	8	7	12	16	11	4
Croatia	1	14	16	16	14	15	12	9	2
Czech Republic	1	11	17	11	8	14	16	12	10
Denmark	5	10	12	11	13	12	12	14	11
Estonia *	2	2	8	14	12	18	20	20	6
Finland	5	9	13	14	18	12	15	11	3
France	7	9	14	13	14	16	14	8	5
Germany	5	13	17	13	18	13	8	8	5
Greece	17	26	13	9	6	10	13	5	1
Hungary *	4	12	11	13	13	13	14	11	9
Ireland	2	14	20	16	12	9	13	8	5
Italy	4	13	17	20	15	12	10	5	3
Lithuania *	5	18	14	5	0	45	14	0	0
Luxembourg *	2	15	21	26	8	12	9	6	1
Malta *	29	15	12	12	7	7	7	7	2
Poland	6	23	22	9	7	8	13	6	6
Portugal	21	32	20	10	6	6	3	2	1
Romania	9	25	13	9	3	7	16	13	5
Slovenia *	0	3	30	22	16	14	14	3	0
Spain *	8	26	22	13	11	11	4	3	2
Sweden	5	13	14	13	11	10	14	13	7
Turkey	30	16	11	9	8	9	9	5	3
United Kingdom	5	11	14	11	12	12	14	11	11
EUROPE - 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

** weighted to reflect the total architectural population in all 25 countries.

CHART 1-12
Population pyramid - analysis of architects by age and gender



The Profession's Reputation

Architects' reputation is measured here by how architects *themselves* feel they are perceived by others - a form of secondary reporting. It is important to clarify these figures, so for example in Table 1-8, 30 per cent of architects responding to this survey say they think the public regards them "quite highly". This is of course different from saying 30 per cent of the public view architects "quite highly" - the survey was not conducted amongst members of the public, nor amongst clients (table 1-9).

Fifty two per cent of architects feel they are regarded "very" or "quite" highly by their clients. But architects feel that only 33 per cent of the general public regard them "very" or "quite" highly. At least half of architects in Denmark,

Sweden and Poland think they are "very" or "quite" highly regarded by the general public. This proportion falls to less than 20 per cent in Ireland, Lithuania, Hungary and Slovenia. Czech, Danish and Swedish architects feel they are most highly rated by their clients, while regard by clients is considered to be lowest in Turkey, Slovenia and Croatia.

The perception ratings are very similar to those recorded in 2008 and 2010.

CHART 1-13

How well architects think they are regarded by the general public

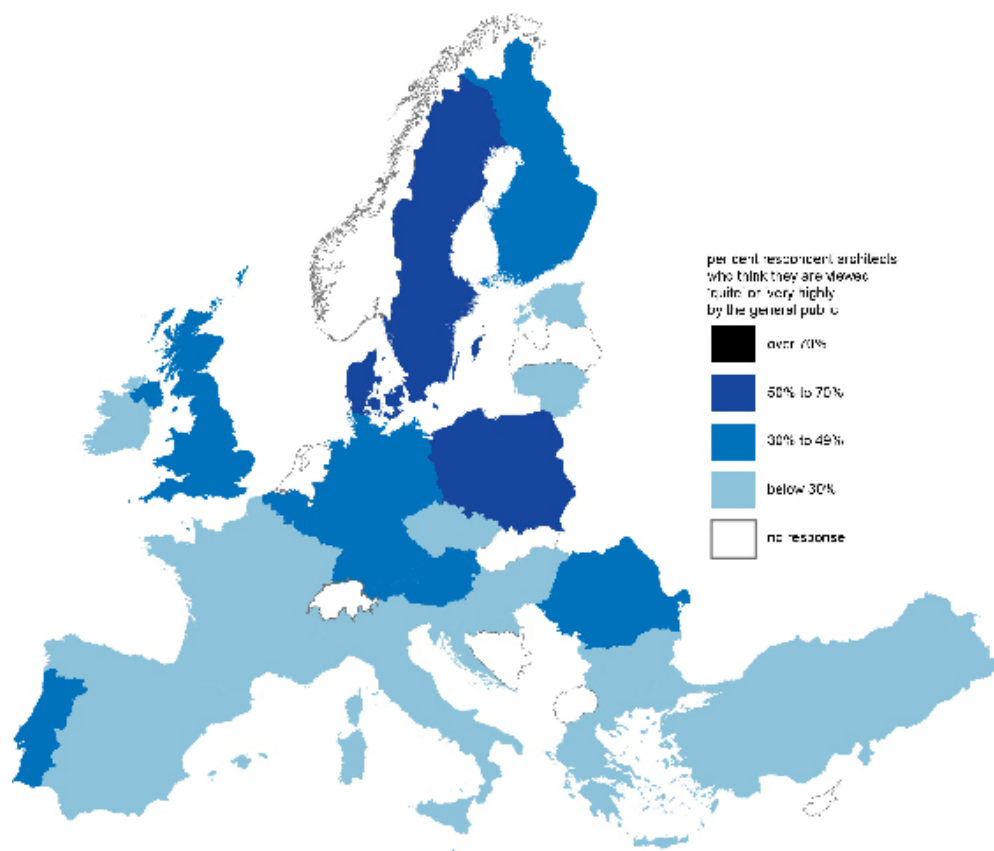


TABLE 1-8

How well Architects think they are regarded by the general public - country analysis

per cent	perception of architects				
	very poorly	quite poorly	neutral	quite highly	very highly
Austria	4	25	34	32	5
Belgium	7	35	34	21	3
Bulgaria	9	23	43	22	3
Croatia	12	31	37	18	2
Czech Republic	5	28	41	25	2
Denmark	1	8	25	59	7
Estonia *	6	29	35	29	0
Finland	5	22	30	40	3
France	10	47	22	19	2
Germany	2	21	31	39	7
Greece	14	28	35	20	3
Hungary *	8	28	48	12	4
Ireland	12	41	34	11	2
Italy	4	27	39	28	2
Lithuania *	5	27	55	14	0
Luxembourg *	2	22	37	34	5
Malta *	5	22	39	29	5
Poland	1	14	34	43	7
Portugal	10	27	33	27	3
Romania	2	24	39	31	5
Slovenia *	11	39	33	14	3
Spain *	10	35	34	20	1
Sweden	2	14	30	47	7
Turkey	8	24	42	23	3
United Kingdom	7	28	31	32	3
EUROPE - 25 **	5	26	36	30	3
2010 EUROPE-23	5	25	34	31	5
2008 EUROPE-17	5	24	33	32	5

* caution - small sample ** weighted to reflect the total architectural population in all 25 countries.

CHART 1-14

How well Architects think they are regarded by the general public - ranked, highest first

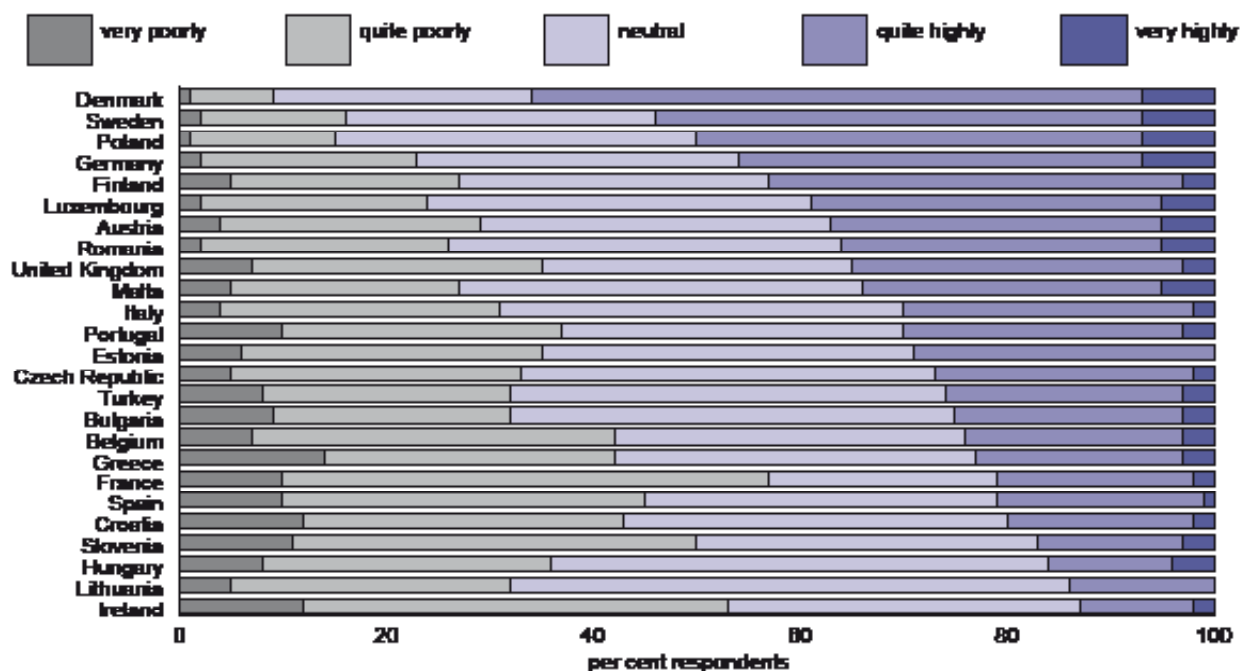
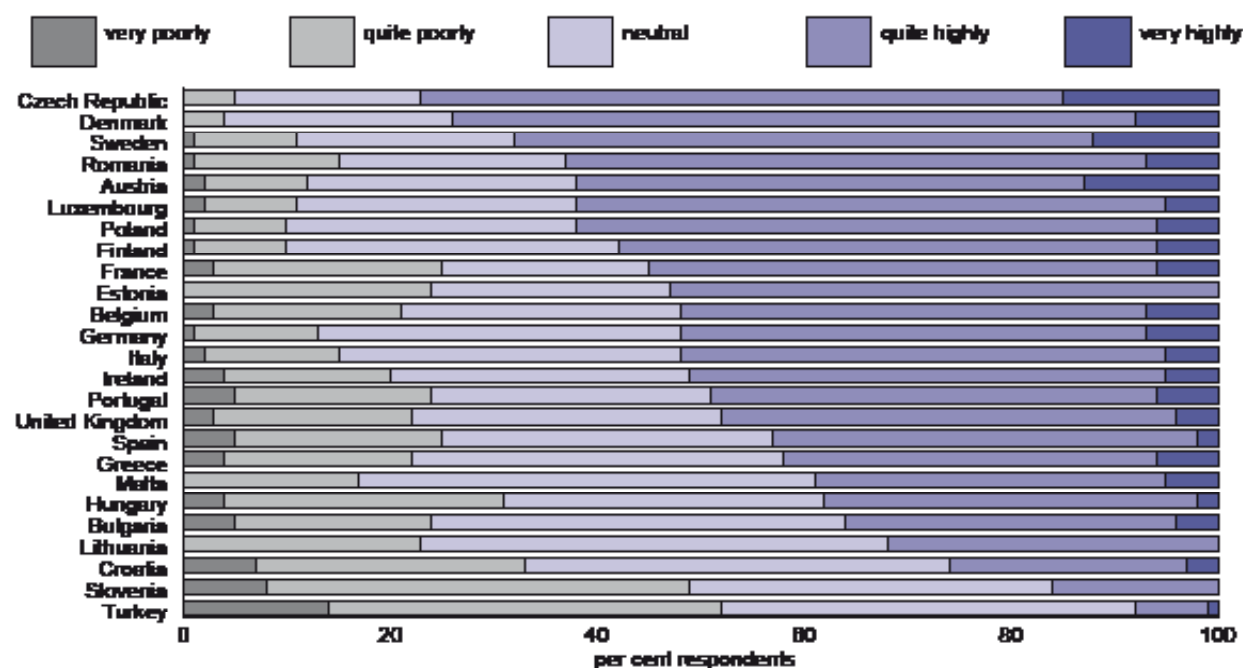


TABLE 1-9
How well Architects think they are regarded by clients - country analysis

per cent	perception of architects				
	very poorly	quite poorly	neutral	quite highly	very highly
Austria	2	10	26	49	13
Belgium	3	18	27	45	7
Bulgaria	5	19	40	32	4
Croatia	7	26	41	23	3
Czech Republic	0	5	18	62	15
Denmark	0	4	22	66	8
Estonia *	0	24	24	53	0
Finland	1	9	32	52	6
France	3	22	21	49	6
Germany	1	12	34	45	7
Greece	4	18	36	36	6
Hungary *	4	27	31	35	2
Ireland	4	16	29	46	5
Italy	2	13	33	47	5
Lithuania *	0	23	45	32	0
Luxembourg *	2	9	26	57	5
Malta *	0	17	44	34	5
Poland	1	9	28	56	6
Portugal	5	19	27	43	6
Romania	1	14	22	56	7
Slovenia *	8	41	35	16	0
Spain *	5	20	32	41	2
Sweden	1	10	21	56	12
Turkey	14	38	40	7	1
United Kingdom	3	19	31	44	4
EUROPE - 25 **	3	15	31	46	6
2010 EUROPE-23	3	14	28	48	7
2008 EUROPE-17	3	15	33	43	5

* caution - small sample ** weighted to reflect the total architectural population in all 25 countries.

CHART 1-15
How well Architects think they are regarded by clients - ranked, highest first



Architecture - the Market

2

The Construction Market in Europe

The total value of the European construction market ('EUROPE - 33') was estimated to be worth €1,657 billion in 2011. This includes civil engineering and infrastructure work.

The five countries with the highest construction output - Germany, the UK, France, Italy and Spain - account for two thirds of Europe's total output.

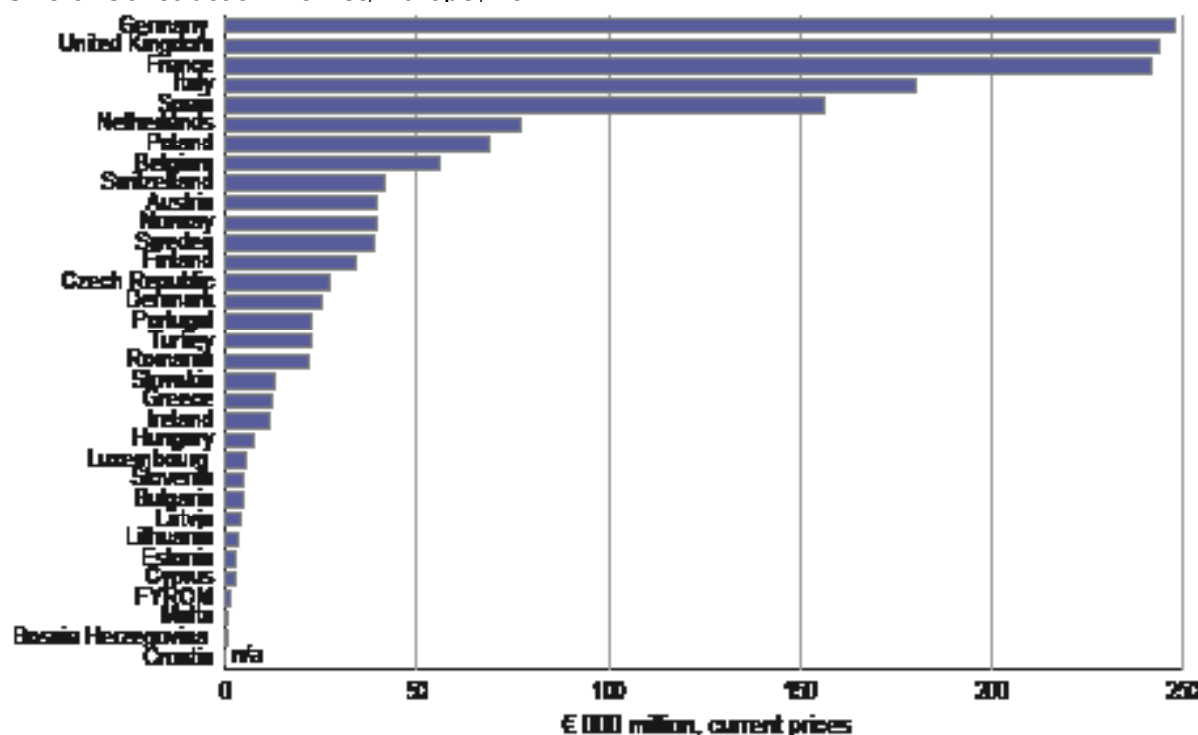
Construction output for 2011 measured per head of the general population averages €2,755 per

person. The highest output per head in 2011 is in Luxembourg and Norway - each is over €7,000 per person.

Construction output across Europe peaked in 2008, and fell quite sharply in 2009 and less sharply in 2010. Output in 2011 (provisional figures) appears to be similar to that of 2010, although figures for the first two quarters of 2012 suggest a further fall. Chart 2-2 shows the most recent changes (first six months of 2012 - provisional figures) for each European country.

CHART 2-1

Size of Construction Market, Europe, 2011



Base: all 33 European countries

Source: compiled from Eurostat, Turkstat and Bosnia Herzegovina Federal Office of Statistics data. Mirza & Nacey estimates where latest data is not available.

TABLE 2-1
Size of construction market Millions of Euros Current Prices

€ millions	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Austria	28,609	28,097	28,569	30,428	32,004	32,667	35,098	38,881	42,521	41,223	39,574	39,574
Belgium	35,862	36,688	36,394	37,595	40,175	42,716	48,553	51,453	56,278	54,078	53,158	56,135
Bosnia Herzegovina(1)	n/a	n/a	n/a	n/a	n/a	288	270	348	484	351	315	n/a
Bulgaria	1,507	1,727	1,813	2,088	2,866	3,999	5,321	6,794	7,596	6,517	5,585	4,859
Croatia (2)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Cyprus	1,234	1,324	1,453	1,599	1,834	2,117	2,385	2,788	3,097	2,792	2,569	2,325
Czech Republic	12,880	14,255	17,011	17,904	18,686	21,004	25,640	29,087	34,510	30,321	28,107	27,124
Denmark	20,550	21,408	21,550	22,492	23,311	25,075	28,856	29,978	29,793	25,505	23,624	24,924
Estonia	938	1,058	1,252	1,352	1,600	2,064	2,780	3,613	3,322	2,218	2,030	2,572
Finland	19,248	19,822	19,770	20,196	21,879	24,128	25,911	29,863	32,229	27,609	30,894	33,922
France	157,605	165,636	170,250	177,465	190,175	205,435	227,059	249,307	262,849	249,444	236,722	241,930
FYROM	666	562	575	626	710	723	799	878	937	915	1,054	1,412
Germany	225,270	214,460	199,390	195,730	189,570	184,740	197,350	206,640	217,350	217,910	218,564	247,633
Greece	21,213	23,011	22,739	24,869	25,850	24,939	29,455	30,204	26,739	23,989	16,984	12,110
Hungary	5,421	6,586	8,172	8,004	8,879	9,762	9,924	10,306	10,625	9,074	8,131	7,496
Ireland	:	:	28,825	31,594	37,723	44,087	51,504	44,448	31,558	20,134	14,033	11,662
Italy	138,840	148,197	156,842	163,900	173,908	184,823	192,576	201,392	204,401	192,348	185,616	180,233
Latvia	1,224	1,426	1,627	1,841	2,575	3,167	4,607	6,592	7,241	4,300	3,293	3,705
Lithuania	1,348	1,465	1,713	2,131	2,434	2,916	3,873	5,347	5,904	3,002	2,762	3,378
Luxembourg	2,810	3,067	3,511	3,700	3,787	4,010	4,281	4,803	5,281	5,255	5,202	5,306
Malta	339	328	399	361	387	457	478	513	546	504	503	501
Netherlands	60,287	64,656	64,880	63,650	63,675	66,646	71,561	78,210	85,665	82,777	73,672	76,913
Norway	18,154	19,291	21,625	20,663	21,921	25,847	29,595	35,866	38,806	33,995	38,221	39,482
Poland	31,790	34,928	31,244	26,164	27,280	35,680	43,232	55,045	68,672	57,284	59,346	68,723
Portugal	24,376	26,226	26,912	25,708	27,167	27,940	29,691	29,900	29,541	27,591	25,246	22,671
Romania	4,568	5,489	6,159	6,717	8,114	11,429	15,882	24,291	31,814	24,703	21,392	22,034
Slovakia	3,939	4,012	4,605	4,774	5,482	7,014	8,943	10,558	14,149	13,621	13,022	12,761
Slovenia	3,978	3,859	4,151	4,597	4,966	5,537	6,604	8,397	9,428	7,867	6,537	4,864
Spain	127,335	146,380	185,434	212,041	232,266	277,803	321,664	323,774	270,999	240,376	191,820	156,525
Sweden	23,676	23,556	24,655	24,987	27,447	28,759	32,265	36,073	35,143	33,913	35,914	38,608
Switzerland	28,585	29,730	31,912	31,181	32,289	33,944	34,534	34,280	37,304	39,776	40,531	41,261
Turkey (3)	14,658	11,430	10,940	10,922	13,349	17,296	18,184	23,316	23,572	16,944	20,113	22,365
United Kingdom	201,818	214,421	230,849	227,986	250,884	245,458	248,894	254,619	251,309	222,157	238,374	243,857
EUROPE - 33 (€ 000 millions)	1,219	1,273	1,365	1,403	1,493	1,602	1,757	1,867	1,879	1,718	1,642	1,657

Source of all data except Turkey and Bosnia Herzegovina: Eurostat, National Accounts by 31 branches - aggregates at current prices. Copyright © Eurostat. All Rights Reserved.

* Where data is asterisked, these figures are marked n/a in the Eurostat National Accounts statistics and the figure above is a Mirza & Nacey estimate based on data from the latest Eurostat Construction Output Production Indices

(1) Source: Derived from raw data sourced from Federal Office of Statistics, Federation of Bosnia and Herzegovina, Statistical Year Book. Raw data converted from Bosnia KM 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. For information the figure for 2011 for output from firms with over 20 employees is € 2139 million

(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. NB, conversion rates changed significantly over the period 1997 to 2001, more stable since 2002. Data from 2010 has been adjusted by applying the percentage change in Eurostat's Construction Production Index to pre 2010 data.

Construction output includes civil engineering and infrastructure work.

CHART 2-2
Changes in Construction Output, 6 months Q1 and Q2 2012

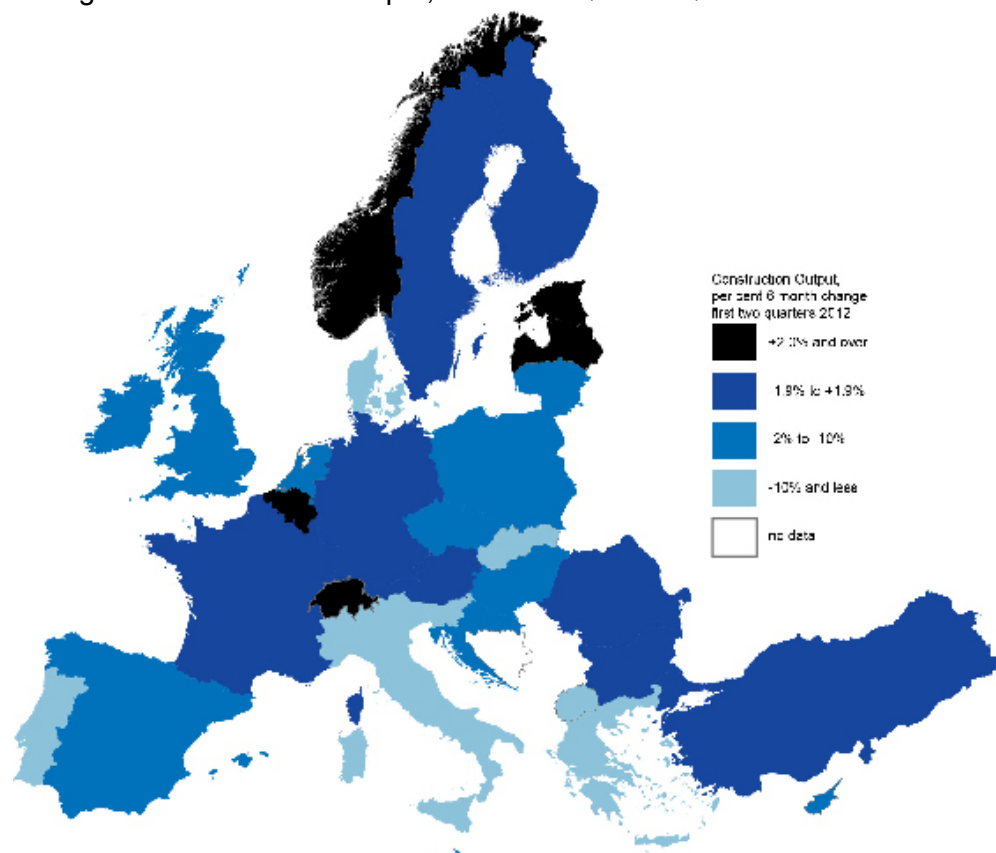
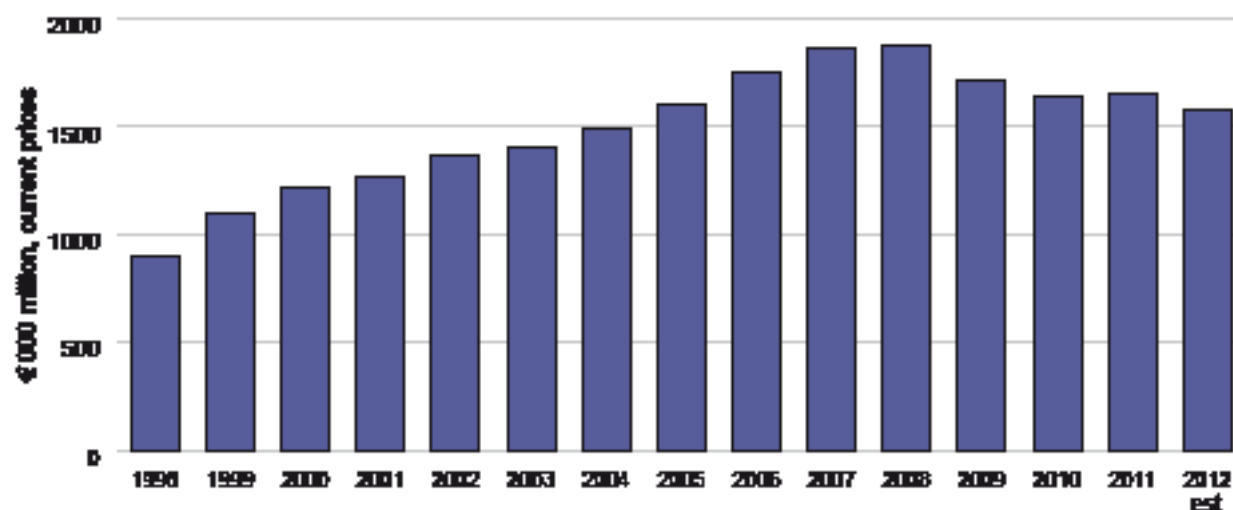


CHART 2-3
Trends in European Construction Output, 1998 to 2012



Base: all 33 European countries

Source: compiled from Eurostat, Turkstat and Bosnia Herzegovina Federal Office of Statistics data. Mirza & Nacey estimates where latest data is not available.

The 2012 figure is an estimate based on the change between Quarter 4 2011 and Quarter 2, 2012 (sourced from Output Production Indices, Eurostat)

TABLE 2-2
Estimated size of construction market, 2011 by country, and comparative values

	construction output (€millions)	population (number as at 01.01.2012)	construction output per head of population (€s)	architects (estimated number)
Austria	39,574	8,443,018	4,687	4,600
Belgium	56,135	11,041,266	5,084	13,200
Bosnia Herzegovina (2010)	315	3,839,265	82	3,000
Bulgaria	4,859	7,327,224	663	2,900
Croatia	n/a	4,398,150	n/a	2,250
Cyprus	2,325	862,011	2,697	900
Czech Republic	27,124	10,504,203	2,582	8,000
Denmark	24,924	5,580,516	4,466	9,800
Estonia	2,572	1,339,662	1,920	600
Finland	33,922	5,401,267	6,280	3,250
France	241,930	65,397,912	3,699	29,900
FYROM	1,412	2,059,794	686	3,000
Germany	247,633	81,843,743	3,026	101,600
Greece	12,110	11,290,785	1,073	16,400
Hungary	7,496	9,962,000	752	4,000
Ireland	11,662	4,495,351	2,594	2,600
Italy	180,233	60,850,782	2,962	147,000
Latvia	3,705	2,042,371	1,814	900
Lithuania	3,378	3,199,771	1,056	1,500
Luxembourg	5,306	524,853	10,110	680
Malta	501	420,085	1,192	650
Netherlands	76,913	16,730,348	4,597	10,700
Norway	39,482	4,985,870	7,919	3,600
Poland	68,723	38,208,618	1,799	13,700
Portugal	22,671	10,541,840	2,151	17,100
Romania	22,034	21,355,849	1,032	7,400
Slovakia	12,761	5,404,322	2,361	1,600
Slovenia	4,864	2,055,496	2,366	1,400
Spain	156,525	46,196,277	3,388	51,000
Sweden	38,608	9,482,855	4,071	5,800
Switzerland	41,261	7,952,555	5,188	5,400
Turkey*	22,365	74,724,269	299	40,600
United Kingdom	243,857	62,989,550	3,871	33,500
EUROPE - 33	1,656,864	601,451,878	2,755	548,530

source: Construction output and population data - Eurostat Copyright © Eurostat. All Rights Reserved. Data for Bosnia and Herzegovina derived from raw data sourced from Federal Office of Statistics, Federation of Bosnia and Herzegovina. Data for Turkey derived from raw data from Turkstat. Where marked by an asterisk, the 2011 data has been derived from Eurostat construction output index rather than absolute figures. The total for EUROPE-33 is therefore a Mirza & Nacey estimate.

Construction output includes civil engineering and infrastructure work.

The Architectural Market in Europe

The architectural market in the 25 surveyed countries is estimated to be worth €14.4 billion in 2011/12. 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 33 European countries, the total estimated value of the architectural market in Europe would be €15 billion. This figure is 11 per cent less than the €17 billion estimated value in 2010/11.

Germany has the largest market by size, worth an estimated €4.2 billion. Next largest is Italy, (€2.8 billion) followed by the UK (€2 billion), and France (€1.3 billion). Compared with 2009/10, the largest falls are recorded in Greece and Ireland, while the largest rises have been in Finland and Denmark.

Analysed per architect, the highest values are recorded by architects in Austria, the United Kingdom, Sweden and Luxembourg. In each of these countries the average market size per architect is greater than €50,000.

CHART 2-4

Value of Architectural Market, average per Architect

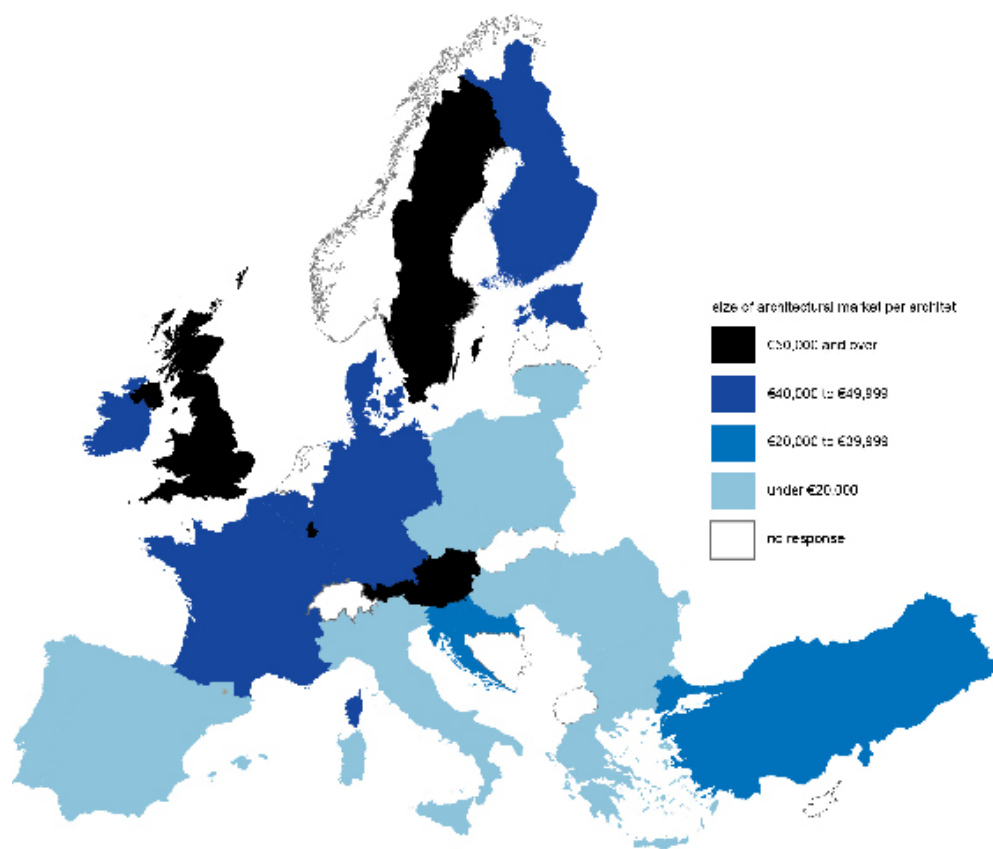


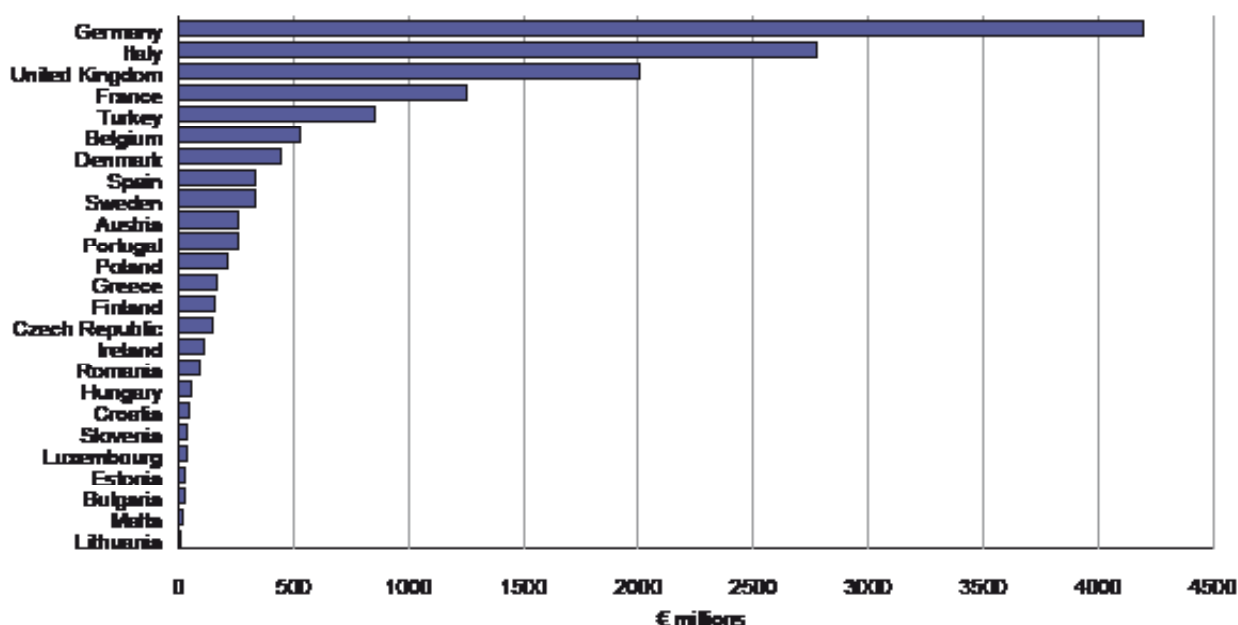
TABLE 2-3
Estimated size of architectural market 2011/12, by country, and comparative values

	market size (€000s)	value per architect (€s)	value per 1000 population (€s)	architectural market as per cent construction	2010 market size (€000s)	2008 market size (€000s)
Austria	262,774	57,125	31,123	0.7	256,292	296,789
Belgium	529,292	40,098	47,938	0.9	556,280	327,108
Bulgaria	26,792	9,239	3,656	0.6	46,116	n/a
Croatia	50,235	22,327	11,422	n/a	64,290	n/a
Czech Republic	153,433	19,179	14,607	0.6	73,045	n/a
Denmark	447,607	45,674	80,209	2.0	308,697	356,228
Estonia *	29,277	48,796	21,854	1.1	12,667	27,524
Finland	161,704	49,755	29,938	0.5	117,456	42,580
France	1,254,376	41,952	19,181	0.5	1,301,699	1,103,778
Germany	4,192,657	41,266	51,228	1.7	4,094,601	3,988,103
Greece	170,961	10,424	15,142	1.6	289,623	294,149
Hungary *	60,566	15,142	6,080	0.9	n/a	n/a
Ireland	112,102	43,116	24,937	1.1	172,362	408,855
Italy	2,775,280	18,879	45,608	1.7	2,708,910	n/a
Lithuania *	9,676	6,450	3,024	0.3	11,455	n/a
Luxembourg *	38,264	56,271	72,905	0.7	n/a	31,828
Malta *	15,565	23,947	37,053	3.0	n/a	13,320
Poland	210,575	15,370	5,511	0.3	258,803	n/a
Portugal	261,110	15,270	24,769	1.3	n/a	n/a
Romania	90,111	12,177	4,219	0.4	63,551	112,659
Slovenia *	42,110	30,079	20,486	1.0	10,359	40,501
Spain *	336,420	6,596	7,282	0.2	n/a	n/a
Sweden	330,785	57,032	34,882	0.9	356,300	145,073
Turkey	856,591	21,098	11,463	3.8	960,371	726,778
United Kingdom	2,006,403	59,893	31,853	0.9	1,955,929	2,800,042
EUROPE - 25	14,424,668	27,770	25,870	1.0		
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 2011/12. The market size has been estimated, see Appendix I for an explanation of the methodology.

* caution - small sample

CHART 2-5
Estimated value of Architectural Market



The Architectural Market analysed by building sector

Private housing now accounts for more than half of the market. Housing includes work to individual homes - the largest sector accounting for 42 per cent of all work - and 'other' private housing, including flats and housing developments; another 9 per cent of work. So in total 51 per cent of architects' work is from private sector housing. This makes housing an even more dominant sector than in previous years, having increased its share of the market from 44 per cent in 2010 and 45 per cent in 2008.

Commercial work - offices, retail, industrial, leisure and other - accounts for 29 per cent of all work, about the same as in 2010. The public

sector accounts for another 20 per cent, down from 26 per cent in 2010.

The highest shares of individual housing are to be found in Greece (57 per cent of all work), Italy (53 per cent), Belgium (41 per cent) and Luxembourg (40 per cent). 'Other' private housing is highest in Bulgaria and Turkey (23 and 22 per cent respectively). Office work has the highest share in Sweden and Estonia, while the highest share of retail work is found in Lithuania and Portugal. Education accounts for over 10 per cent of the market in Denmark and Germany, while public housing is at least 10 per cent of the market in Austria and Finland.

CHART 2-6

Proportion of market by building sector

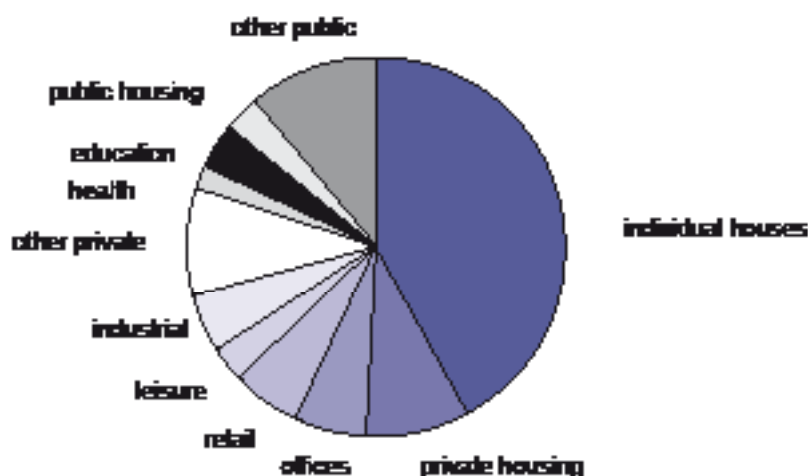


TABLE 2-4

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	52	92
offices	6	68
retail	6	65
leisure and the arts	3	60
industrial	5	64
health	2	58
education	4	61
public housing	3	58
other private	9	67
other public	11	68

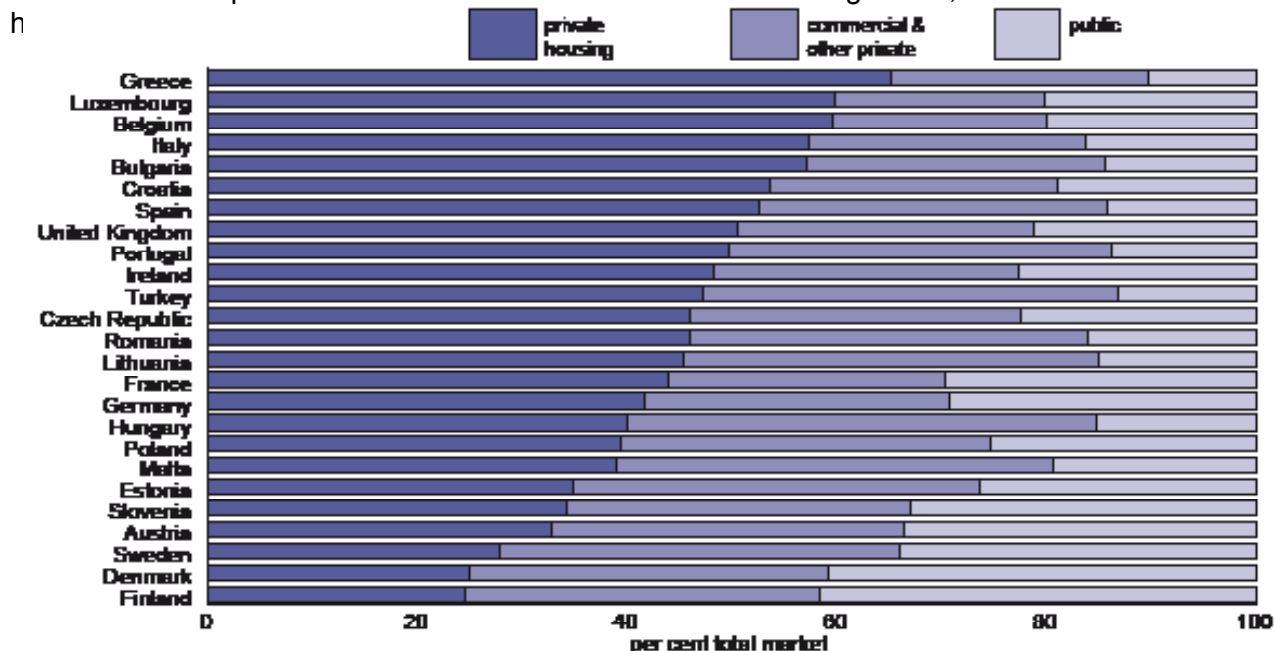
TABLE 2-5

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	21	12	10	5	4	6	5	7	13	8	8	100
Belgium	41	19	5	4	1	5	3	4	7	6	6	100
Bulgaria	34	23	9	1	1	10	3	1	6	8	5	100
Croatia	33	21	7	4	2	4	2	3	1	10	12	100
Czech Republic	31	15	9	2	5	6	2	6	2	10	13	100
Denmark	19	6	12	2	7	5	7	13	5	8	15	100
Estonia *	19	16	14	5	1	11	5	8	2	7	12	100
Finland	11	14	11	7	6	3	4	9	10	7	19	100
France	27	17	7	5	4	4	4	8	8	7	10	100
Germany	26	16	9	4	3	7	4	11	2	6	12	100
Greece	57	8	4	3	2	5	1	3	0	12	6	100
Hungary *	23	17	5	9	7	12	4	4	0	12	6	100
Ireland	39	10	5	6	5	2	8	8	1	11	5	100
Italy	53	5	4	6	2	5	1	2	1	10	13	n/a
Lithuania *	28	18	4	12	9	14	1	2	5	1	7	100
Luxembourg *	40	20	10	2	1	3	1	9	3	4	8	100
Malta *	25	14	7	2	2	9	1	5	0	23	13	100
Poland	22	17	10	4	2	11	3	4	5	8	13	100
Portugal	38	11	5	11	3	6	4	4	1	11	5	100
Romania	31	15	6	5	6	8	3	4	4	12	6	100
Slovenia *	25	9	9	7	2	6	1	8	8	9	15	100
Spain *	38	15	4	6	2	4	2	2	3	18	7	100
Sweden	14	13	14	7	6	4	3	9	4	7	18	100
Turkey	25	22	8	9	4	9	3	2	2	10	6	100
United Kingdom	33	17	7	5	5	3	4	8	4	8	5	100
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 2-7 Proportion of work undertaken in each main building sector, ranked in order of



The Architectural Market analysed by type of client

The single most important client group for architects is individual clients. They account for 45 per cent of clients. The proportion is highest in Greece, Portugal, Spain and Belgium and lowest in Sweden, Finland, Estonia and Denmark. The next most important source of clients is the public sector, accounting for 18 per cent of clients. The proportion is highest in Denmark, Finland and Sweden, and lowest in Greece, Lithuania and Portugal. Compared with 2009/10, the client base has moved away from public sector and more towards individual clients. Currently, public sector clients account for 18 per cent of architects' clients, compared with 23 per cent in 2010 and 22 per cent in 2008.

CHART 2-8

Proportion of market by client type

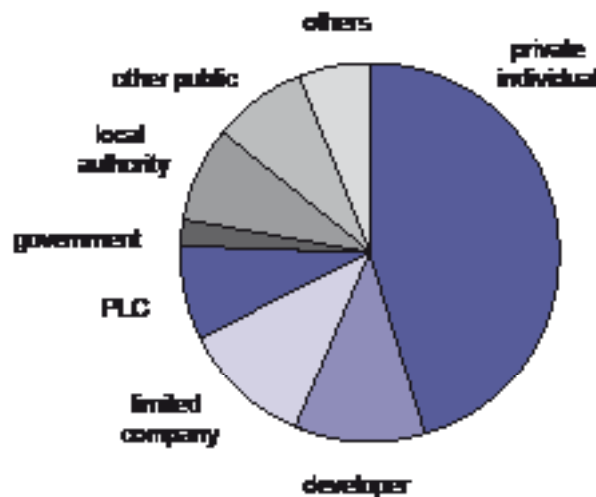


TABLE 2-6

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	43	9	11	3	14	9	4	8	100
Belgium	53	13	10	2	1	6	10	4	100
Bulgaria	43	16	15	7	2	7	2	7	100
Croatia	44	4	29	4	1	11	2	3	100
Czech Republic	39	12	12	6	1	22	5	3	100
Denmark	25	8	11	8	11	17	11	10	100
Estonia *	24	26	8	15	7	10	7	4	100
Finland	20	15	25	2	3	15	17	4	100
France	39	12	9	1	1	12	17	9	100
Germany	43	6	11	2	7	17	6	8	100
Greece	69	9	2	8	1	5	3	3	100
Hungary *	36	7	28	5	1	9	6	7	100
Ireland	48	8	11	4	6	4	10	10	100
Italy	48	11	10	11	0	7	8	6	100
Lithuania *	41	25	21	0	2	3	5	3	100
Luxembourg *	49	23	4	3	7	7	8	1	100
Malta *	31	14	16	7	13	1	10	9	100
Poland	35	18	14	6	2	11	6	7	100
Portugal	53	11	11	6	2	6	3	8	100
Romania	44	10	19	3	1	7	10	6	100
Slovenia *	28	11	22	2	2	24	4	7	100
Spain *	55	8	8	4	1	6	10	7	100
Sweden	19	16	24	6	8	13	10	4	100
Turkey	34	5	25	16	1	4	7	9	100
United Kingdom	40	19	14	5	3	5	8	7	100
EUROPE - 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

The Architectural Market analysed by type of service

Building design is the dominant service offered and accounts for exactly 50 per cent of the market. It is above 60 per cent in more than half of the countries surveyed and lowest in Denmark, Italy and Malta.

Interior design accounts for 14 per cent of the market, while project management, feasibility studies and planning each account for between 6 and 7 per cent of revenue. Compared with previous surveys, building design accounts for a smaller proportion, having dropped overall from 69 per cent in 2010 to 50 per cent now. Rises are recorded by interior design and 'other' services.

CHART 2-9

Proportion of market by type of service

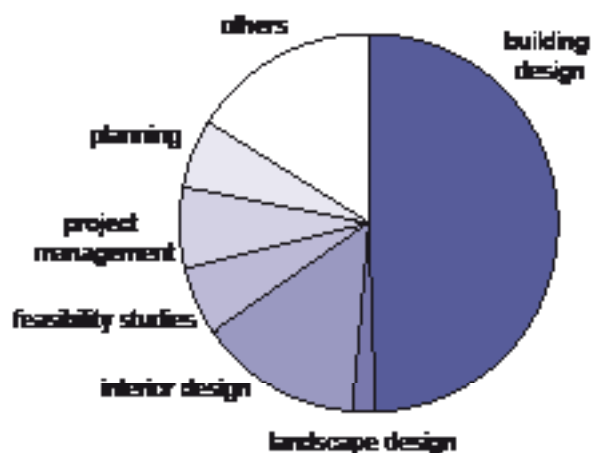


TABLE 2-7

Proportion of work undertaken by each service type

per cent	building design	landscape design	interior design	feasibility studies	project management	planning	other service	TOTAL
Austria	67	1	8	8	4	3	10	100
Belgium	66	0	7	5	11	3	8	100
Bulgaria	61	2	10	7	5	10	5	100
Croatia	62	3	12	2	8	6	8	100
Czech Republic	47	8	15	1	6	14	9	100
Denmark	44	6	9	2	13	9	19	100
Estonia *	53	7	19	1	6	12	3	100
Finland	65	1	9	1	1	13	9	100
France	65	1	7	10	7	5	6	100
Germany	57	8	10	3	3	6	12	100
Greece	47	4	16	2	4	4	23	100
Hungary *	55	0	6	4	7	6	22	100
Ireland	63	2	6	6	9	3	11	100
Italy	43	3	17	5	6	5	21	n/a
Lithuania *	60	5	17	4	9	6	0	100
Luxembourg *	68	1	7	4	8	6	6	100
Malta *	33	0	7	3	33	0	23	100
Poland	66	1	12	2	6	6	8	100
Portugal	53	1	14	5	8	8	11	100
Romania	61	1	9	9	5	8	7	100
Slovenia *	61	5	15	4	5	7	4	100
Spain *	52	1	9	2	8	5	22	100
Sweden	54	3	10	10	6	11	6	100
Turkey	53	2	13	3	12	3	14	100
United Kingdom	63	2	7	10	7	3	9	100
EUROPE - 25	50	2	14	6	7	6	16	100
2010 EUR-23	69	2	8	4	6	7	4	100
2008 EUR-17	66	3	9	3	5	4	9	100

* caution - small sample

Future Prospects

Forty three per cent of respondents anticipate 'no change' to their workloads in the next 12 months. But nearly as many, 35 per cent, expect workloads to fall. The proportion who anticipate a rise is 21 per cent.

The highest levels of pessimism are expressed by architects in Greece, Portugal, Slovenia, Spain and Italy - where at least half of architects predict workloads to fall. At least 37 per cent of architects in Turkey, Lithuania, Finland, Sweden, the UK and Denmark say they expect workloads to rise. Greatest stability is anticipated by architects in Estonia and Germany, where more than 60 per cent of respondents say they expect "no change".

The 'balance' figure - which reports on the difference between optimists and pessimists - is negative in 12 out of 25 countries. Mapping the balance figures below shows a broad north / south split (although there are exceptions for example Turkey). Since the first survey in 2008, the proportion of architects expecting workloads to fall has increased in each successive survey, from 28 per cent in 2008 through 32 per cent in 2010 to 35 per cent now.

Larger practices appear to be more optimistic than smaller ones; less than 20 per cent of practices with 30 or more staff say they expect workloads to fall over the next 12 months, compared with about 40 per cent of practices with five or fewer staff.

CHART 2-10
Workload predictions for 2013

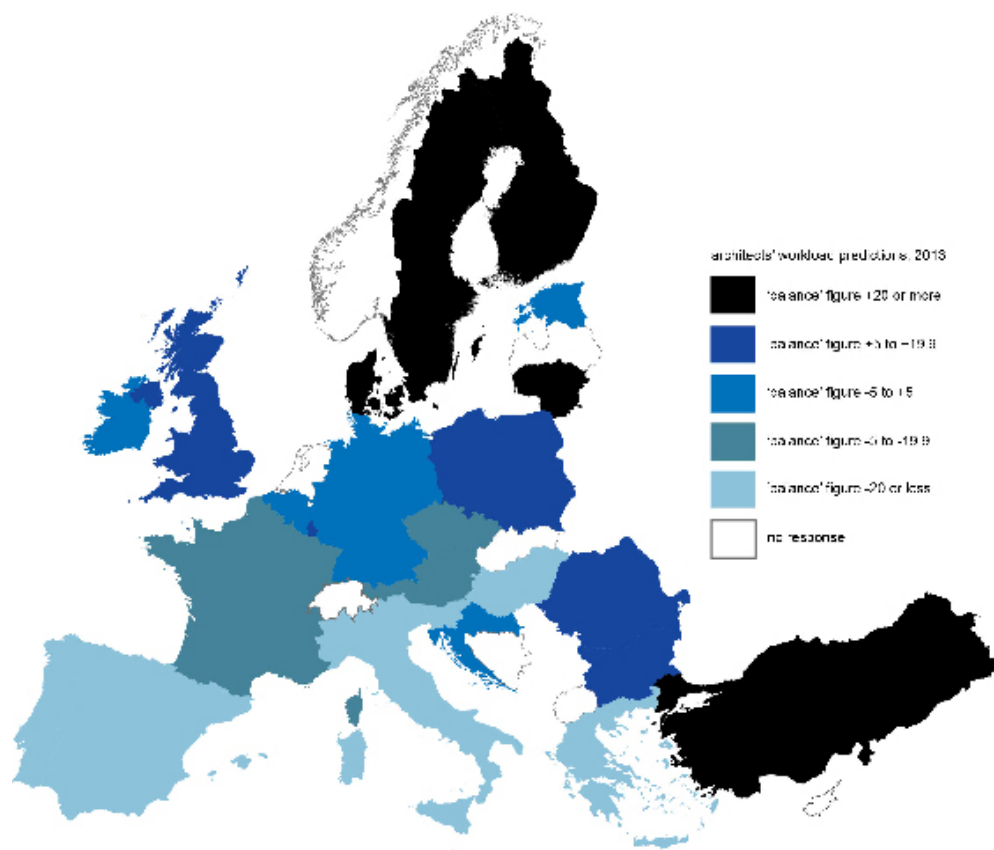


CHART 2-11

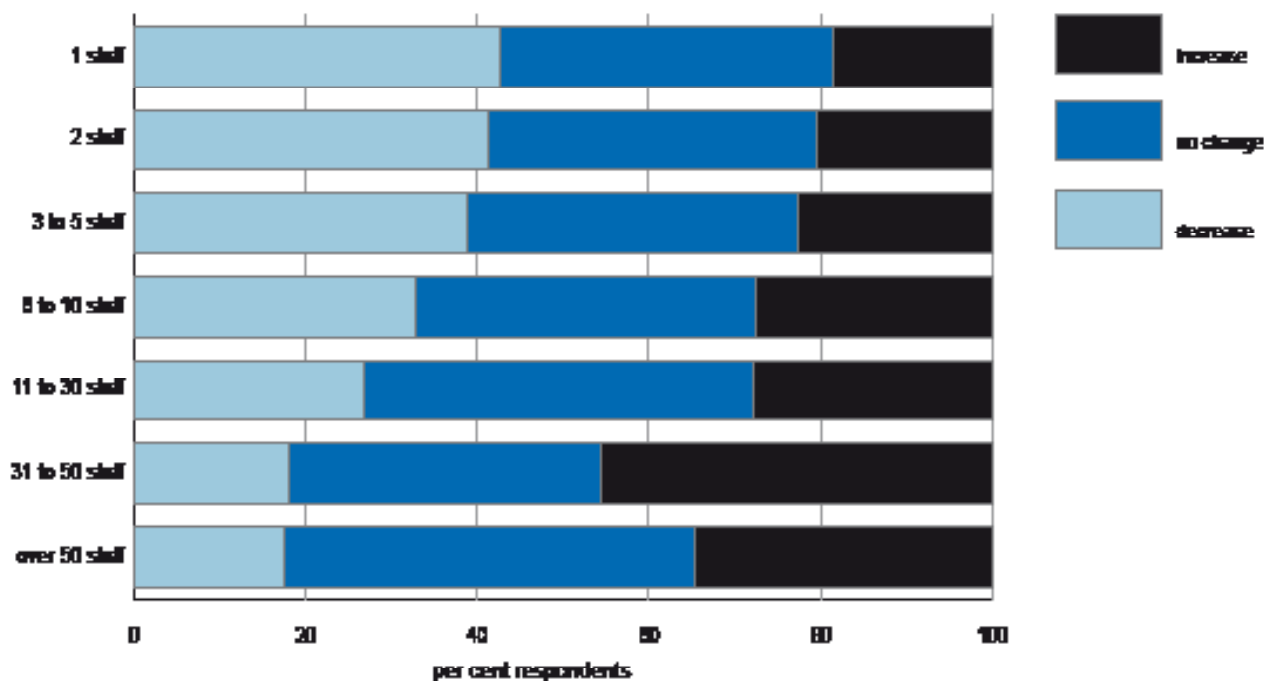


TABLE 2-8
Future workload prospects for 2013, analysed by country

per cent	per cent of Principals who expect their practice workloads to change over the coming 12 months			balance**
	up	no change	down	
Austria	21	51	28	-8
Belgium	26	47	27	-1
Bulgaria	29	47	24	+5
Croatia	29	40	31	-2
Czech Republic	19	48	33	-14
Denmark	37	49	13	+24
Estonia *	12	76	12	0
Finland	38	53	10	+28
France	26	41	33	-7
Germany	20	61	19	0
Greece	7	28	65	-59
Hungary *	19	39	42	-23
Ireland	31	42	27	+4
Italy	15	36	50	-35
Lithuania *	46	38	15	+31
Luxembourg *	34	49	17	+17
Malta *	25	35	40	-15
Poland	36	44	21	+15
Portugal	11	24	65	-54
Romania	31	49	20	+10
Slovenia *	10	35	55	-45
Spain *	8	40	52	-44
Sweden	38	51	12	+26
Turkey	44	40	16	+28
United Kingdom	38	42	21	+17
EUROPE - 25	21	43	35	-14
<i>2010 EUROPE-23</i>	<i>24</i>	<i>44</i>	<i>32</i>	<i>-8</i>
<i>2008 EUROPE-17</i>	<i>28</i>	<i>45</i>	<i>28</i>	<i>0</i>

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

Architecture - the Practice

3

Profile of Architectural Practices

The number of private architectural practices in Europe-25 is estimated to be 156,000. 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 33 European countries produces an estimate of 164,000 private architectural practices in Europe, 6 per cent higher than the 2010 estimate of 155,000 practices.

The practice profile shows a very significant skew towards small businesses. A clear majority - 63 per cent - are one person practices. Eighteen per cent have two staff, while 15 per cent have between 3 and 5 staff. This means that just 4 per cent of architectural practices across Europe have more than five architectural staff. In numerical terms, there are an estimated 6,700 practices in Europe-25 who employ more than five architectural staff.

CHART 3-1
Average size of architectural practices

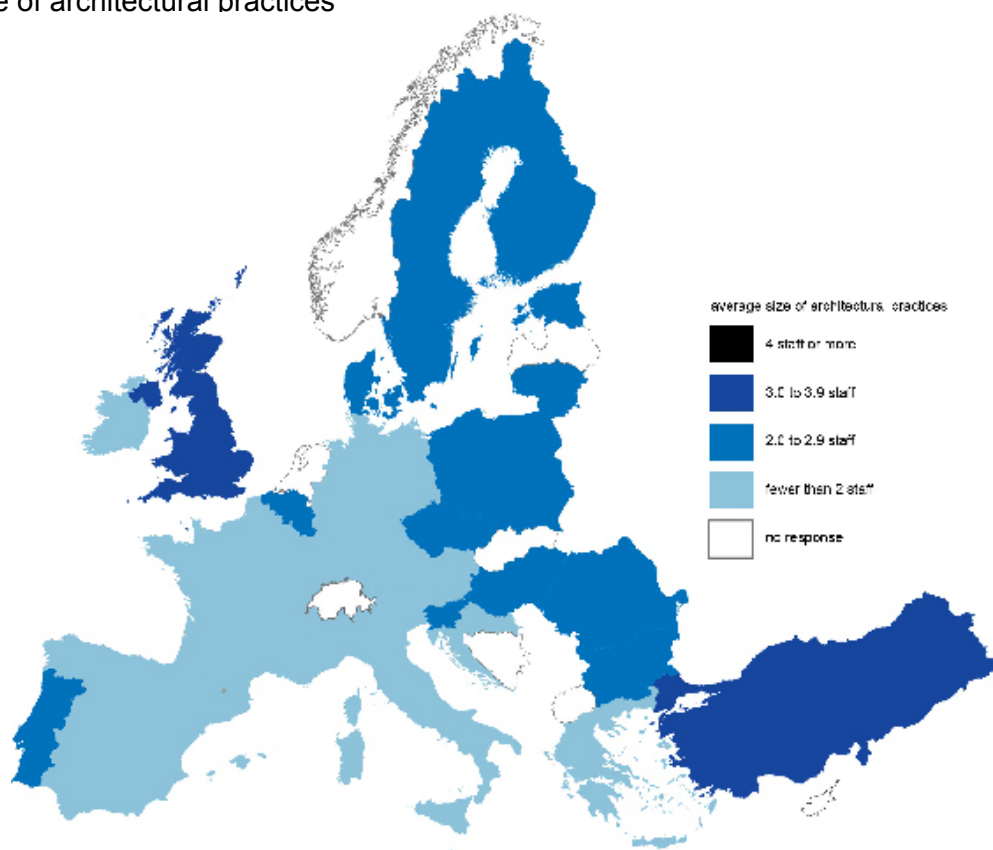


TABLE 3-1
Estimated number and size of architectural practices

	size of architectural practice (number of architectural staff)							TOTAL
number (estimate)	1 staff	2 staff	3 to 5 staff	6 to 10 staff	11 to 30 staff	31 to 50 staff	over 50 staff	
Austria	754	482	302	88	14	0	0	1,640
Belgium	2,241	612	500	287	65	3	1	3,709
Bulgaria	457	211	205	50	6	1	0	930
Croatia	436	219	138	33	8	0	0	835
Czech Republic	1,082	416	381	125	27	0	0	2,031
Denmark	1,106	333	202	84	45	10	2	1,782
Estonia *	52	39	59	20	3	1	0	172
Finland	379	83	130	41	27	0	0	661
France	5,323	1,082	1,256	262	41	3	1	7,968
Germany	21,813	9,060	4,577	1,274	249	46	8	37,026
Greece	2,892	992	1,188	113	34	0	0	5,219
Hungary *	262	170	208	48	11	0	0	699
Ireland	686	171	131	24	14	1	0	1,027
Italy	44,484	7,722	5,436	681	71	2	1	58,397
Lithuania *	182	103	65	59	14	0	0	422
Luxembourg *	85	31	29	15	7	0	0	166
Malta *	56	47	34	0	9	0	0	146
Poland	2,516	921	623	287	72	2	2	4,423
Portugal	1,485	741	781	183	36	0	0	3,226
Romania	756	448	544	81	19	2	0	1,851
Slovenia *	202	57	120	25	12	0	0	417
Spain *	5,143	1,247	1,585	178	0	0	0	8,153
Sweden	786	182	128	78	26	5	2	1,207
Turkey	1,097	1,986	3,076	832	227	11	2	7,232
United Kingdom	3,915	775	965	379	270	65	16	6,385
EUROPE - 25	98,193	28,134	22,663	5,247	1,305	151	35	155,725
per cent of practices	63	18	15	3	1	<1	<1	100
2010 EUR-23	86,049	19,477	18,963	5,814	1,973	279	83	132,643
2008 EUR-17	37,369	13,489	10,868	5,318	2,014	449	344	69,851

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

* caution - small sample

CHART 3-2
Practices analysed by size

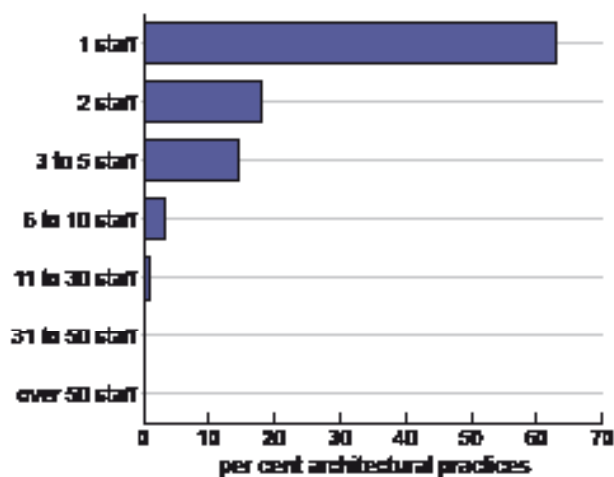
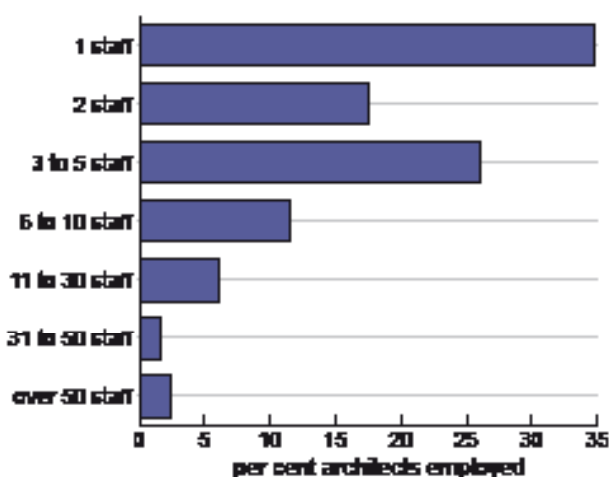


CHART 3-3
Proportion of architects employed in practices of different sizes



Legal Formation of Practices

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

Two thirds (67 per cent) of all Principals consider their business formation to be an 'independent architect'. This may include Sole Principals and Freelancers. Twenty one per cent of businesses are limited companies, another 2 per cent are PLCs.

More than 80 per cent of practices are 'independent architects' in Greece and Italy. Partnerships are more commonly found in Estonia, Czech Republic, Denmark, and

Lithuania - where they account for over 25 per cent of practices. The highest proportion of architectural practices that are limited companies are found in Hungary, Sweden, Croatia, Bulgaria, Romania and Turkey, where at least 50 per cent of practices are limited. There is only one country, Finland, where the majority of practices are PLCs (60 per cent); elsewhere PLCs are not a common form of practice.

Compared with 2008 and 2010, the proportion of independent architects has increased markedly, from 51 per cent in 2010 to 67 per cent in 2012. This is partly accounted for by the inclusion of different countries in the latest survey.

CHART 3-4

Proportion of architectural practices that are limited companies / PLCs / corporations

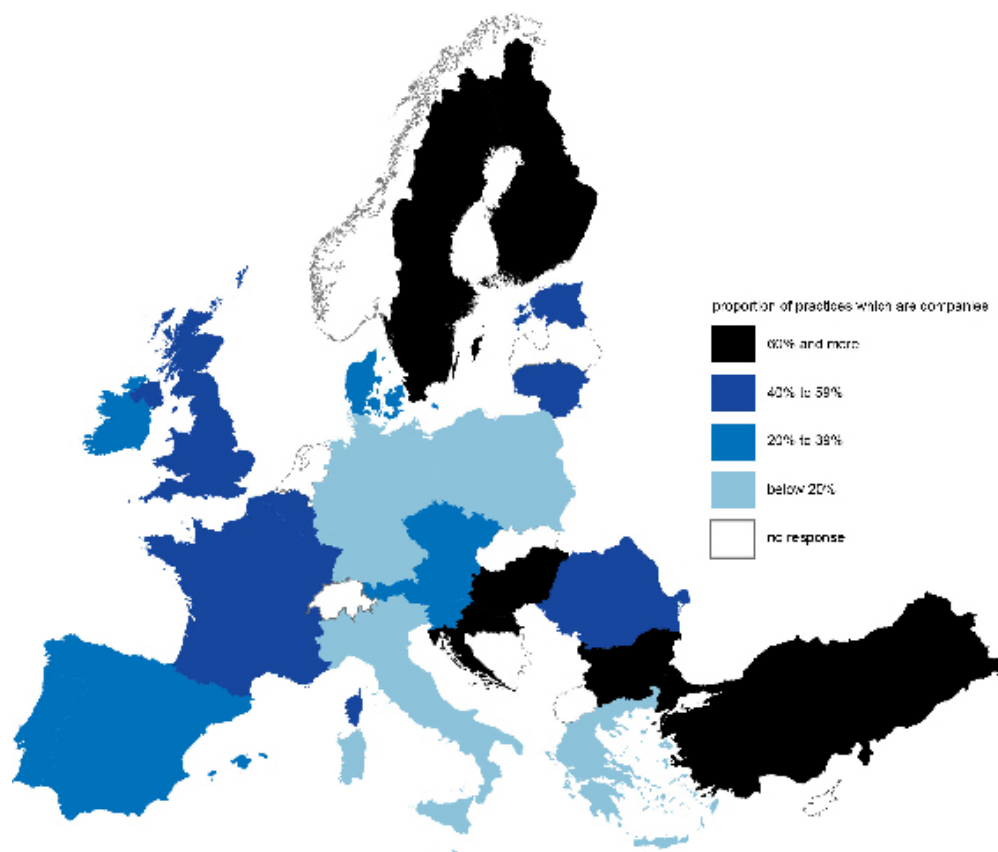
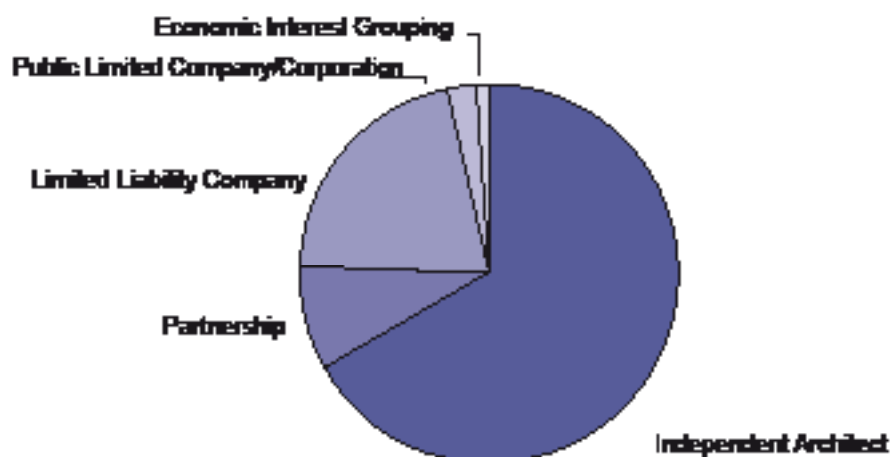


TABLE 3-2
Legal formation of architectural practices - based on type of practice in which Principals work

per cent	independent architect	partnership	limited company	PLC (public limited company) / corporation	economic interest group
Austria	63	10	25	2	1
Belgium	49	3	43	5	0
Bulgaria	33	5	61	0	1
Croatia	26	2	68	4	0
Czech Republic	35	30	32	1	3
Denmark	49	28	15	8	1
Estonia *	18	41	32	9	0
Finland	32	2	5	60	0
France	56	2	39	4	0
Germany	74	14	11	1	0
Greece	87	6	3	3	0
Hungary *	17	6	73	1	2
Ireland	54	9	37	1	0
Italy	89	8	2	0	1
Lithuania *	25	25	42	8	0
Luxembourg *	45	4	40	11	0
Malta *	56	17	22	6	0
Poland	71	11	16	2	0
Portugal	63	11	23	3	0
Romania	40	2	58	0	0
Slovenia *	47	16	37	0	0
Spain *	64	6	23	1	6
Sweden	23	2	70	4	1
Turkey	34	6	55	5	0
United Kingdom	36	12	46	7	0
EUROPE - 25	67	9	21	2	1
<i>2010 EUR-23</i>	<i>51</i>	<i>10</i>	<i>31</i>	<i>5</i>	<i>2</i>
<i>2008 EUR-17</i>	<i>52</i>	<i>18</i>	<i>22</i>	<i>4</i>	<i>3</i>

* caution - small sample

CHART 3-5
Type of architectural businesses



Practice Revenue

The average revenue of architectural practices in Europe rises in line with practice size. A practice with between 3 and 5 staff reports average revenue four times that of a one person practice; while a practice with between 6 and 10 staff has an average revenue more than ten times that of a one person practice. 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 2011, 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 each of the survey years for small and medium sized practices. For example, the average revenue recorded by a practice with between 3 and 5 architectural staff fell by 4 per cent between 2008 and 2010 and by a further 14 per cent between 2010 and 2012.

TABLE 3-3

Average revenue per practice analysed by country and practice size

€s	size of practice (number of architectural staff)						
	1	2	3 to 5	6 to 10	11 to 30	31 to 50	51+
Austria	62,460	107,774	290,614	643,469	1,342,856	n/a	n/a
Belgium	70,402	78,786	207,080	439,862	1,139,673	n/a	n/a
Bulgaria	9,979	17,783	64,794	76,255	n/a	n/a	n/a
Croatia	26,376	74,660	93,741	160,050	470,251	n/a	n/a
Czech Republic	26,817	57,967	129,208	259,958	699,211	n/a	n/a
Denmark	68,886	160,624	424,881	771,921	2,042,185	4,133,904	19,426,123
Estonia *	37,667	57,574	337,800	116,288	n/a	n/a	n/a
Finland	94,312	131,209	391,238	629,257	1,386,000	n/a	n/a
France	59,590	169,294	331,050	883,467	1,796,424	n/a	n/a
Germany	59,779	94,088	202,032	440,416	1,065,000	n/a	n/a
Greece	21,773	33,861	37,002	71,500	n/a	n/a	n/a
Hungary *	14,116	17,311	201,530	146,850	n/a	n/a	n/a
Ireland	43,154	101,324	240,674	501,000	1,378,483	n/a	n/a
Italy	36,640	60,380	88,541	253,669	294,218	n/a	5,651,357
Lithuania *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg *	73,933	154,000	272,718	683,115	1,355,000	n/a	n/a
Malta *	42,300	86,125	42,750	n/a	n/a	n/a	n/a
Poland	20,791	24,566	72,482	132,438	696,961	n/a	n/a
Portugal	33,239	35,078	82,528	508,499	775,900	n/a	n/a
Romania	16,430	52,789	51,269	175,358	464,048	n/a	n/a
Slovenia *	28,200	n/a	88,750	n/a	n/a	n/a	n/a
Spain *	25,111	58,452	63,094	193,125	n/a	n/a	n/a
Sweden	81,099	196,857	500,503	700,687	1,825,127	3,676,083	26,270,585
Turkey	34,272	47,648	109,263	225,491	n/a	n/a	n/a
United Kingdom	48,566	120,700	342,232	760,354	1,956,043	4,214,074	18,623,402
EUROPE - 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

Figures are averages (means) and refer to the year 2011/12

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

How Practices Charge for their Services

Forty three per cent of current jobs are charged as a percentage of the contract value. But nearly as many, 36 per cent, are charged as a lump sum. The gap between these two methods of charging has been narrowing since the first survey in 2008, when 56 per cent of jobs were charged on a percentage basis. Charging as a percent of the contract value is still the method

used for at least half of jobs in 11 of the 25 countries surveyed. Twelve per cent of jobs are charged by the hour but this rises to 60 per cent in Sweden and 41 per cent in Finland, well above levels recorded elsewhere. Greek architects report the highest proportion of jobs (16 per cent) which are undertaken at risk.

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	57	24	17	2
Belgium	63	17	19	2
Bulgaria	36	42	13	9
Croatia	50	27	12	11
Czech Republic	39	41	16	3
Denmark	31	36	29	5
Estonia *	27	52	16	5
Finland	12	45	41	2
France	72	20	6	2
Germany	60	16	22	2
Greece	25	52	7	16
Hungary *	47	26	16	10
Ireland	35	46	14	5
Italy	41	40	7	12
Lithuania *	77	14	1	7
Luxembourg *	69	16	13	3
Malta *	42	30	16	12
Poland	33	30	32	5
Portugal	45	32	12	10
Romania	50	34	8	9
Slovenia *	66	20	10	5
Spain *	54	32	9	5
Sweden	3	32	60	4
Turkey	53	30	3	13
United Kingdom	33	44	20	4
EUROPE - 25	43	36	12	9
<i>2010 EUROPE-23</i>	<i>49</i>	<i>29</i>	<i>18</i>	<i>5</i>
<i>2008 EUROPE-17</i>	<i>56</i>	<i>23</i>	<i>16</i>	<i>6</i>

Hourly charge-out rates

The variation in hourly rates between countries is wide. 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 Europe-25 average hourly charge-out rate for Principals, adjusted for PPP, is €54 per hour; for Architects it is €44 while Technologists average €29 per hour. These figures are the averages charged to clients for an hour of their work, before tax.

The PPP hourly charge-out rates (table 3-5) are highest for Principals in the United Kingdom, Luxembourg, Austria and Denmark. 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.

Average hourly rates adjusted for PPP had increased between 2008 and 2010 surveys, but have now fallen. The average rate for Principals was €62 in 2008, rose to €66 in 2010 and has now fallen to €54. This partly reflects the inclusion of different countries in the sample. This pattern is repeated for average rates for all three staff types.

TABLE 3-5

Average hourly charge-out rates ADJUSTED to take account of Purchasing Power Parity

€s	average hourly charge-out rates ADJUSTED to take account of Purchasing Power Parities (PPP), Euros		
	principals	architects	technologists
Austria	82	70	56
Belgium	58	49	40
Bulgaria	50	40	19
Croatia	36	33	18
Czech Republic	21	18	13
Denmark	80	71	57
Estonia *	44	44	23
Finland	64	56	44
France	77	68	54
Germany	70	58	46
Greece	26	11	8
Hungary *	27	27	16
Ireland	69	54	43
Italy	34	29	10
Lithuania *	n/a	n/a	n/a
Luxembourg *	82	66	49
Malta *	51	38	32
Poland	20	10	6
Portugal	29	11	9
Romania	11	9	4
Slovenia *	36	22	5
Spain *	25	18	10
Sweden	75	69	60
Turkey	21	10	7
United Kingdom	90	76	54
EUROPE - 25	54	44	29
2010 EUROPE-23	66	56	43
2008 EUROPE-17	62	50	39

* caution - small sample

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.

CHART 3-6

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

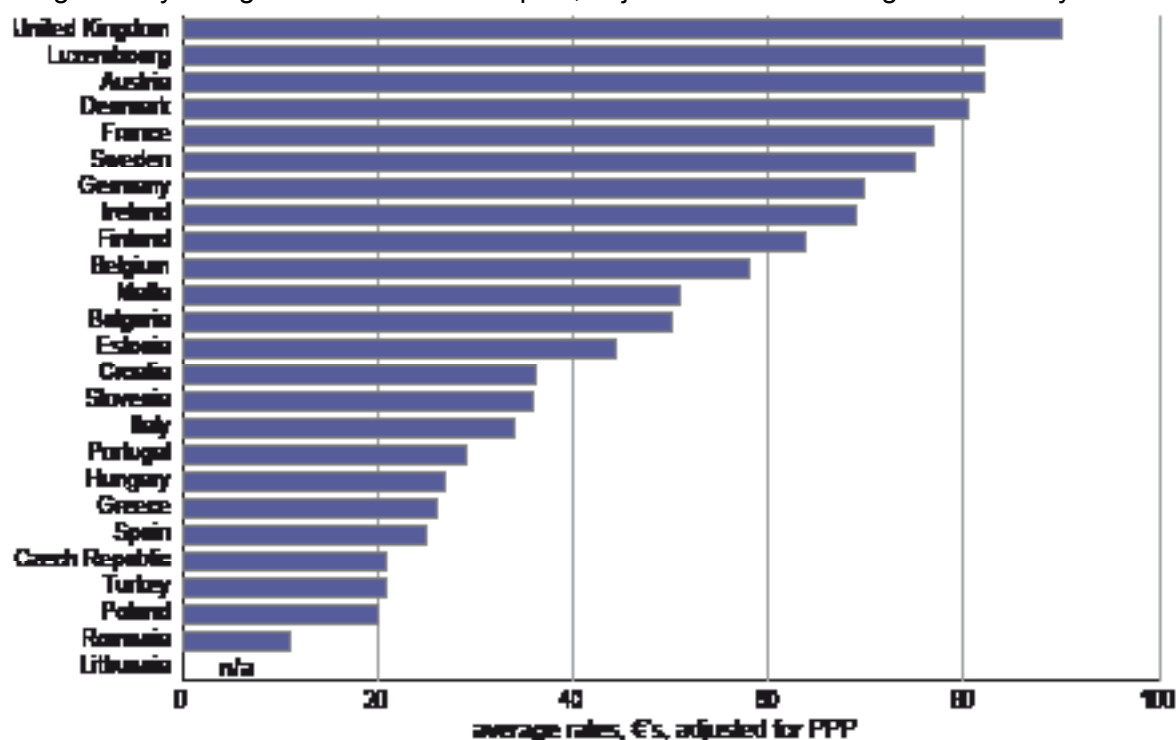


TABLE 3-6

Average hourly charge-out rates, unadjusted

€s	average hourly charge-out rates, Euros		
	principals	architects	technologists
Austria	88	75	60
Belgium	65	55	45
Bulgaria	26	20	9
Croatia	27	24	13
Czech Republic	16	14	10
Denmark	114	101	81
Estonia *	35	35	18
Finland	80	70	55
France	85	75	60
Germany	72	60	48
Greece	25	10	8
Hungary *	18	18	11
Ireland	80	63	50
Italy	35	30	10
Lithuania *	n/a	n/a	n/a
Luxembourg *	100	80	60
Malta *	40	30	25
Poland	12	6	4
Portugal	25	10	8
Romania	7	5	2
Slovenia *	30	18	5
Spain *	24	18	10
Sweden	96	88	77
Turkey	13	6	4
United Kingdom	92	77	55
EUROPE - 25	55	43	30
2010 EUROPE-23	75	63	50
2008 EUROPE-17	63	50	40

* caution - small sample

Practice Costs & Profits

Pre-tax profits are expressed here as a percentage of revenue. In a one-person practice, pre-tax profits account for 56 per cent of revenue. This falls in line with practice size, so a practice of 3 to 5 staff records an average pre-tax profit of 39 per cent, falling further to 18 or 19 per cent in the largest practices.

These averages include some negative figures reported by practices that have made a loss. There may be variations in the definition of 'profits' so inter-country comparisons should be considered with caution.

Pre-tax and after-tax profits as a percentage of revenue appear to have increased in all practice sizes, compared with the last survey in 2010. Average figures are now much closer to those recorded in the 2008 survey, and even higher for the 1 person practice. It is important to remember that the countries included in each survey changed so these comparisons are not perfect. Significantly, average pre-tax profits reported by practices in Italy are generally the highest in each practice size group.

TABLE 3-7

Proportion of revenue - costs, pre-tax and post-tax profits - analysed by practice size

per cent	per cent of practice revenue		
	costs	pre-tax profits	profits after tax
1 staff	43	56	52
2 staff	56	44	40
3 to 5 staff	61	39	32
6 to 10 staff	70	29	22
11 to 30 staff	76	23	17
31 to 50 staff	81	18	11
over 50 staff	81	19	11

CHART 3-7

Costs, profits (after tax) and tax paid on profits

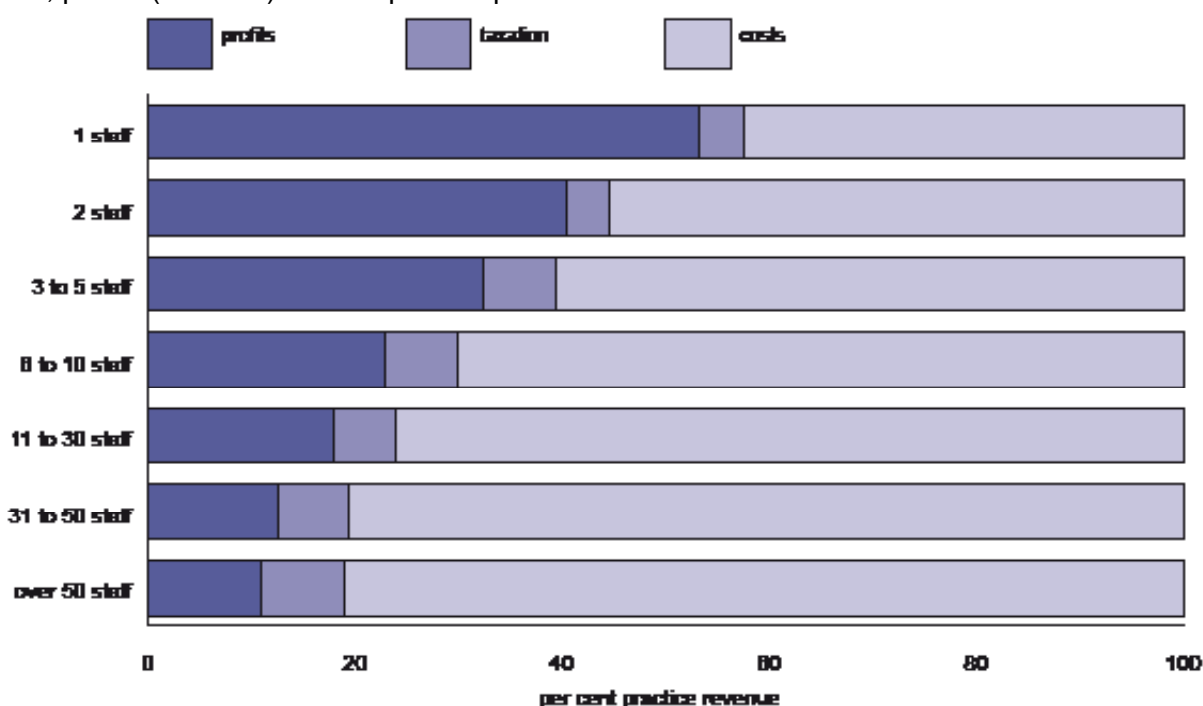


TABLE 3-8

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	40	30	26	21	n/a	n/a
Belgium	45	43	21	27	20	n/a	n/a
Bulgaria	59	42	43	35	n/a	n/a	n/a
Croatia	43	28	17	14	23	n/a	n/a
Czech Republic	48	46	31	29	15	n/a	n/a
Denmark	71	56	35	25	11	n/a	n/a
Estonia *	n/a	n/a	n/a	26	n/a	n/a	n/a
Finland	37	35	29	30	31	n/a	n/a
France	47	31	26	29	21	n/a	n/a
Germany	59	51	44	29	18	n/a	n/a
Greece	53	51	48	33	n/a	n/a	n/a
Hungary *	61	62	44	8	n/a	n/a	n/a
Ireland	51	23	18	17	10	n/a	n/a
Italy	68	60	60	52	57	n/a	n/a
Lithuania *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg *	63	44	23	27	18	n/a	n/a
Malta *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Poland	54	46	39	47	44	n/a	n/a
Portugal	64	47	34	48	36	n/a	n/a
Romania	52	38	37	15	n/a	n/a	n/a
Slovenia *	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Spain *	50	34	38	31	n/a	n/a	n/a
Sweden	51	27	18	14	19	7	10
Turkey	48	54	45	33	31	n/a	n/a
United Kingdom	58	46	30	34	32	32	22
EUROPE - 25	56	44	39	29	23	18	19
<i>2010 EUR-23</i>	<i>45</i>	<i>34</i>	<i>29</i>	<i>22</i>	<i>20</i>	<i>13</i>	<i>15</i>
<i>2008 EUR17</i>	<i>52</i>	<i>44</i>	<i>40</i>	<i>31</i>	<i>26</i>	<i>17</i>	<i>26</i>

* caution - small sample

TABLE 3-9
Break-down of costs analysed by practice size

per cent	size of architectural practice (number of architectural staff)						
	1	2	3 to 5	6 to 10	11 to 30	31 to 50	51+
rent	16	17	15	12	12	12	14
utilities	15	10	8	5	4	2	3
staff	8	31	40	53	57	56	56
travel & motor	17	11	9	7	6	4	5
bank	4	3	3	3	2	2	2
insurance	13	9	8	5	4	2	5
legal & financial	7	6	5	5	3	3	4
promotion	2	2	1	2	1	3	2
CPD costs	<1	<1	<1	<1	<1	<1	<1
other costs	17	11	11	9	11	16	9
TOTAL costs	100	100	100	100	100	100	100

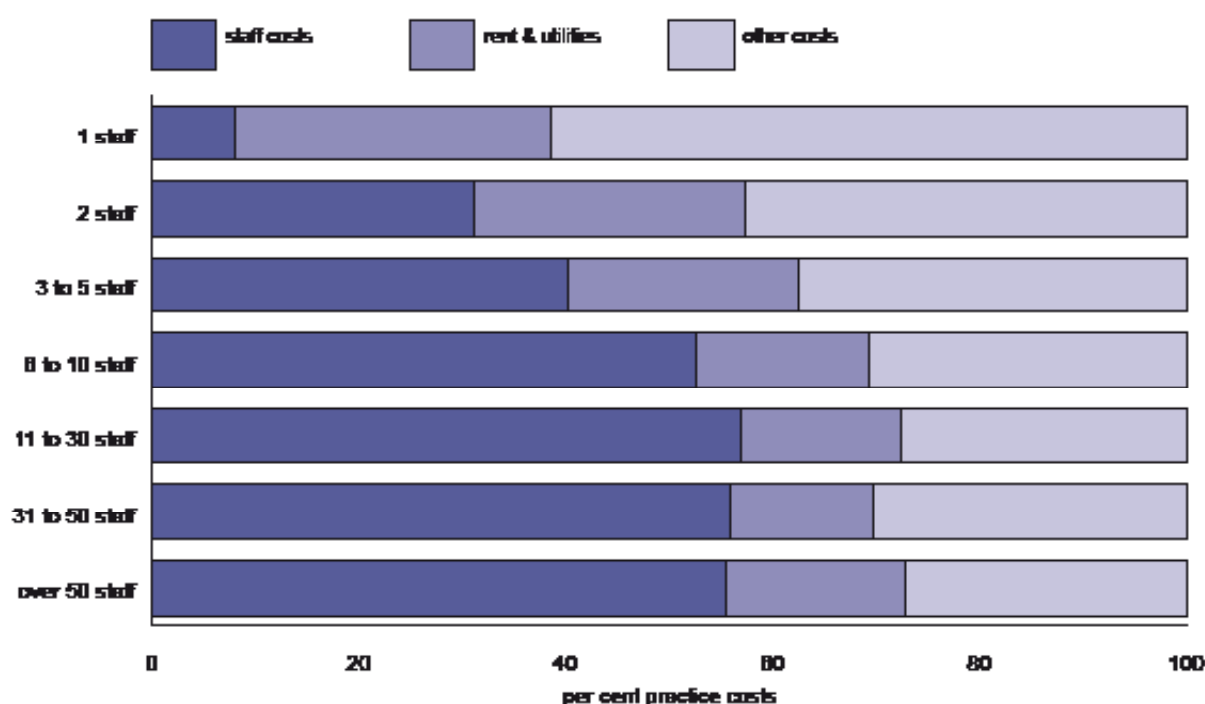
Costs and profits are expressed as a percentage of practice revenue. The largest single cost element is staffing, and in practices with more than 5 staff it accounts for over 50 per cent of all costs.

Rent accounts for between 12 and 17 per cent, with the proportion highest for the smallest practice sizes. Likewise utilities, travel and

insurance account for a higher proportion of costs for small practices than medium or large ones.

The new question added this year about CPD costs has revealed a very low level of practice expenditure on this activity - less than one per cent - across all practice sizes.

CHART 3-8
Main cost elements analysed by practice size



Revenue from outside own country

About 6 per cent of practice revenues are generated by work undertaken outside the country in which the architectural practice is based.

This proportion is estimated to be highest in the United Kingdom, Luxembourg, Belgium, Denmark, Portugal and Malta but is far less significant in other countries. Please note these figure are an approximation because a significant number of responses to this question were incomplete.

The proportion of revenue earned from outside the practice's country is very similar to the figure recorded in 2008 although lower than the 8 per cent recorded in 2010. A similar set of countries report highest turnover from outside their country in 2012 as in previous surveys.

CHART 3-9

Source of revenue

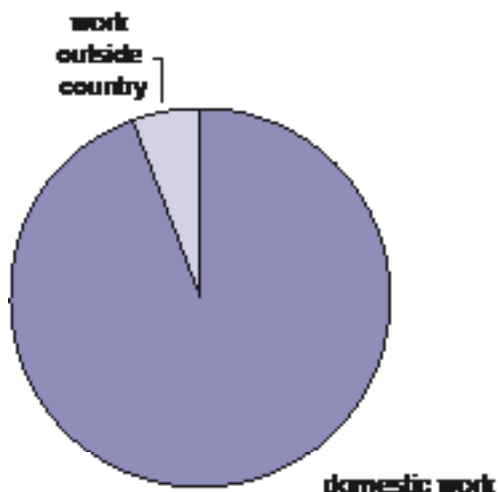


TABLE 3-10

Proportion of practice revenue derived from outside the country, analysed by country

per cent	turnover derived from outside the country
Austria	5.5
Belgium	19.8
Bulgaria	3.4
Croatia	1.2
Czech Republic	6.5
Denmark	18.5
Estonia *	8.2
Finland	5.0
France	5.4
Germany	8.6
Greece	1.0
Hungary *	3.1
Ireland	5.7
Italy	1.6
Lithuania *	7.2
Luxembourg *	20.5
Malta *	13.6
Poland	10.6
Portugal	14.8
Romania	3.8
Slovenia *	2.1
Spain *	2.5
Sweden	2.4
Turkey	4.0
United Kingdom	22.4
EUROPE - 25	5.6
2010 EUROPE-23	7.7
2008 EUROPE-17	6.0

* caution - small sample

data is based on incomplete responses to this question and should be considered with caution

Associations

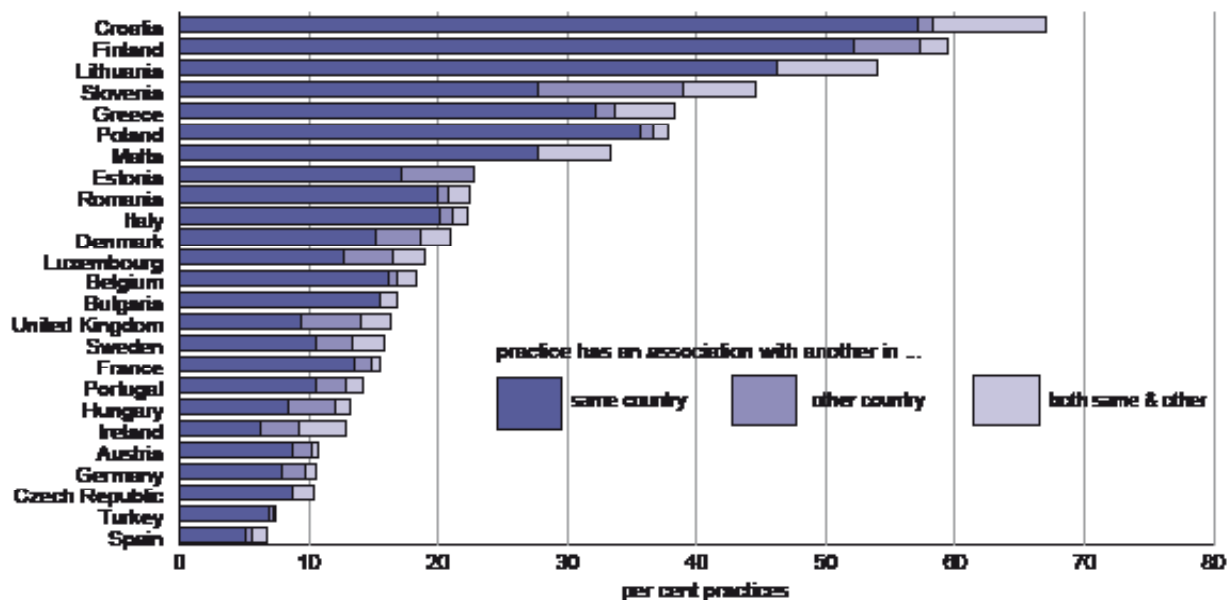
TABLE 3-11

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	89	9	1	1
Belgium	82	16	1	2
Bulgaria	83	16	0	1
Croatia	33	57	1	9
Czech Republic	90	9	0	2
Denmark	79	15	4	2
Estonia *	77	17	6	0
Finland	41	52	5	2
France	84	14	1	1
Germany	90	8	2	1
Greece	62	32	1	5
Hungary *	87	8	4	1
Ireland	87	6	3	4
Italy	78	20	1	1
Lithuania *	46	46	0	8
Luxembourg *	81	13	4	3
Malta *	67	28	0	6
Poland	62	36	1	1
Portugal	86	11	2	1
Romania	78	20	1	2
Slovenia *	56	28	11	6
Spain *	93	5	1	1
Sweden	84	11	3	2
Turkey	92	7	0	0
United Kingdom	83	9	5	2
EUROPE - 25	79	18	2	1
2010 EUROPE-23	82	15	2	2
2008 EUROPE-17	85	12	3	n/a

* caution - small sample

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



Associations

The majority of practices, 79 per cent, have no formal association with another practice. This figure has been falling since the first survey in 2008, so more practices appear to be developing formal associations. Of the 21 per cent who do have a formal association, most associate with another architect or practice in

the same country. Just 3 per cent of all practices have a formal association in another country. Although the level of formal association is low overall, associations are very common in some countries. At least 50 per cent of practices have a formal association with another in Croatia, Finland, and Lithuania.

Branch Offices

Working in a branch or subsidiary office provides information as to how many offices an architectural practice might have. So in Turkey, the UK, Denmark, Sweden and Slovenia, where over 10 per cent of architects works in a branch office, the implication is that practices are more likely to have multiple offices.

The head office of those practices which operate branch offices is usually (in 90 per cent of cases) located in the same country. Only in Ireland are more than half of head offices located in a different country.

TABLE 3-12

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	88	87
Belgium	3	96	100
Bulgaria	5	95	90
Croatia	8	92	91
Czech Republic	6	94	94
Denmark	13	88	89
Estonia *	2	71	83
Finland	8	75	74
France	2	95	94
Germany	7	86	88
Greece	3	89	91
Hungary *	5	76	77
Ireland	8	48	48
Italy	3	98	97
Lithuania *	0	75	100
Luxembourg *	6	76	79
Malta *	5	67	57
Poland	9	90	87
Portugal	8	87	80
Romania	8	85	81
Slovenia *	12	80	82
Spain *	2	71	100
Sweden	12	82	81
Turkey	17	89	89
United Kingdom	16	87	74
EUROPE - 25	6	90	91
2010 EUROPE-23	12	89	98
2008 EUROPE-17	9	71	93

* caution - small sample

Architects - the Individual

4

Earnings

Architects' earnings have fallen slightly, to an average (adjusted for PPP) of €29,014 before tax. This is a fall of 1.6 per cent between 2010 and 2012 and comes on top of a fall of 13 per cent between 2008 and 2010. So the rate of decline in earnings appears to have eased considerably.

The adjustment of average earnings for PPP takes account of differing price levels in the 25 surveyed countries, adjusting each country's average earnings figure by its purchasing power parity (PPP) index.

These adjusted figures show average earnings are highest in the United Kingdom, Germany, and Luxembourg, followed by Denmark and Austria. Average adjusted earnings are lowest in Bulgaria and Romania.

Compared with the previous survey in 2010, average earnings have decreased the most in Slovenia, Bulgaria and Estonia. Average earnings are not universally lower; they are in fact higher in eight of the surveyed countries, notably Romania, Italy (but small sample in 2010), Germany, Turkey and Denmark.

CHART 4-1

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

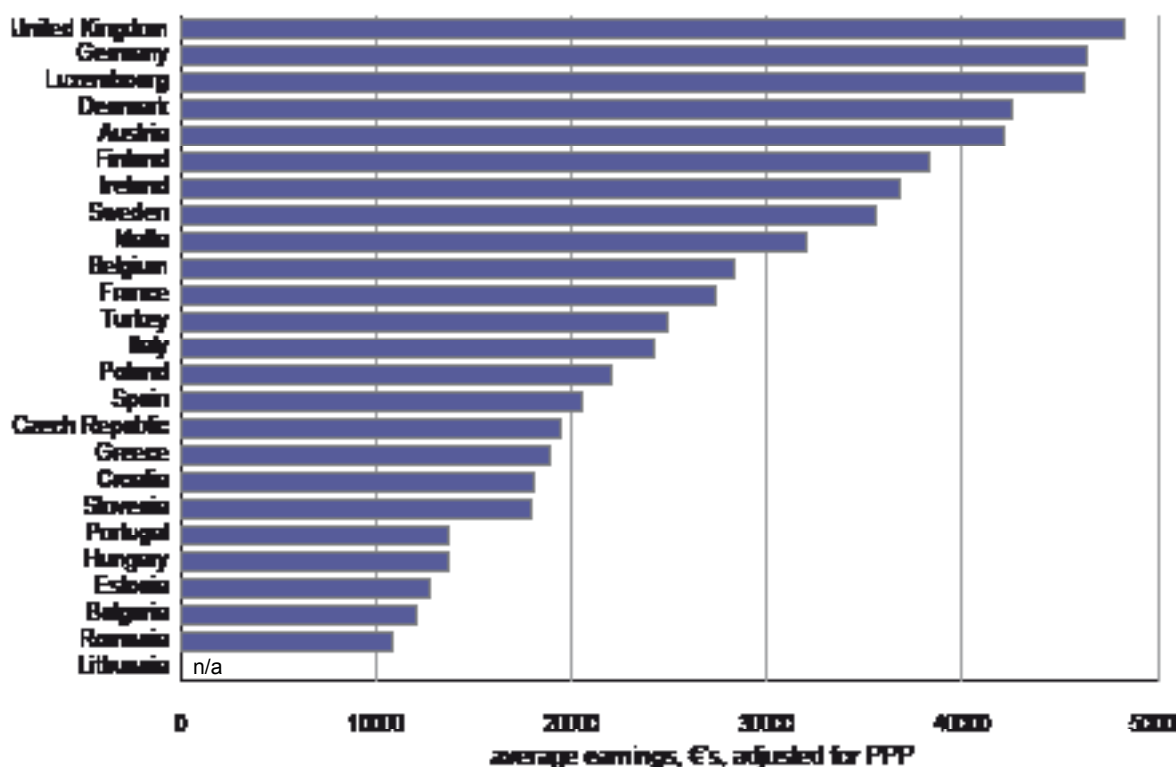
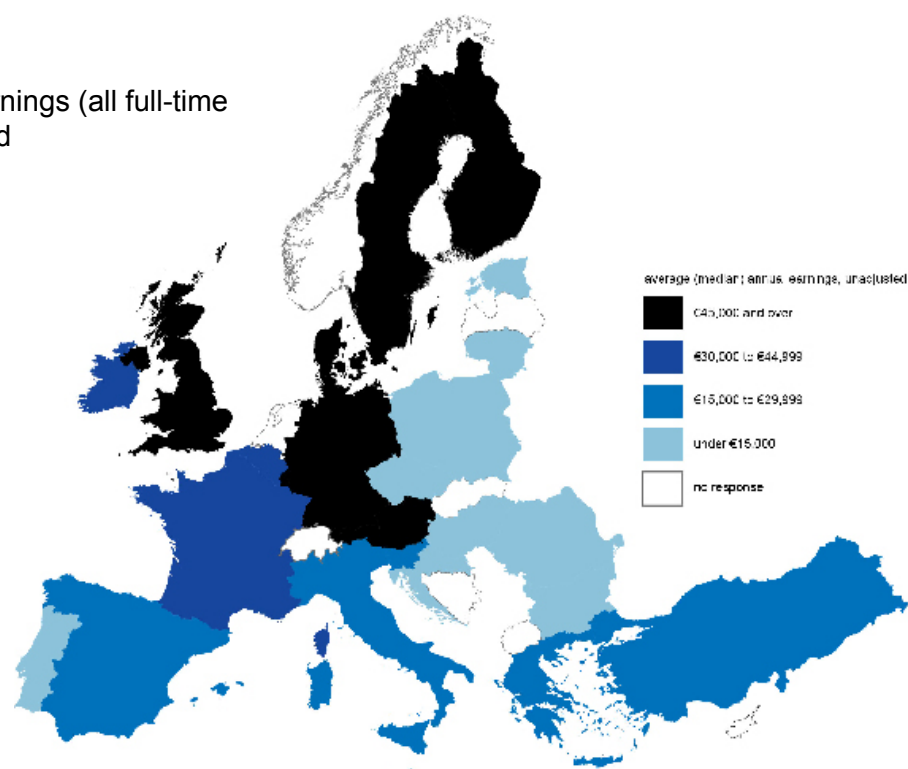


TABLE 4-1
Average earnings of full-time Architects analysed by country

€s	average earnings 2012		average earnings adjusted for PPP	
	adjusted for PPP	unadjusted	2010	2008
Austria	42,174	45,000	38,925	47,337
Belgium	28,354	31,700	28,384	28,222
Bulgaria	12,030	6,135	14,555	n/a
Croatia	18,078	13,341	18,892	n/a
Czech Republic	19,410	14,888	21,268	n/a
Denmark	42,543	60,496	37,843	39,012
Estonia *	12,776	10,080	15,318	36,084
Finland	38,339	48,000	35,601	32,327
France	27,326	30,250	28,871	33,241
Germany	46,422	48,000	39,932	38,797
Greece	18,927	18,000	20,534	26,846
Hungary *	13,678	8,795	n/a	n/a
Ireland	36,847	43,000	40,200	52,209
Italy	24,248	25,000	18,779	n/a
Lithuania *	n/a	n/a	10,252	n/a
Luxembourg *	46,267	56,400	n/a	44,484
Malta *	32,051	25,000	n/a	34,447
Poland	22,045	13,249	24,935	n/a
Portugal	13,714	12,000	n/a	n/a
Romania	10,844	6,485	8,172	22,748
Slovenia *	17,964	15,000	29,240	31,491
Spain *	20,534	20,000	n/a	n/a
Sweden	35,649	45,559	36,612	29,990
Turkey	24,902	15,514	21,432	20,486
United Kingdom	48,242	49,062	45,922	45,014
EUROPE - 25** (23 in 2010 and 17 in 2008)	29,014	28,133	29,493	34,003

* caution - small sample ** EUROPE - 25 'unadjusted' figure is a weighted average and takes account of the number of architects in each participating country. The PPP figure is not weighted.

CHART 4-2
Range of average earnings (all full-time architects), unadjusted



Earnings by Field of Employment

TABLE 4-2

Average earnings analysed by country and field of employment (adjusted for PPP)

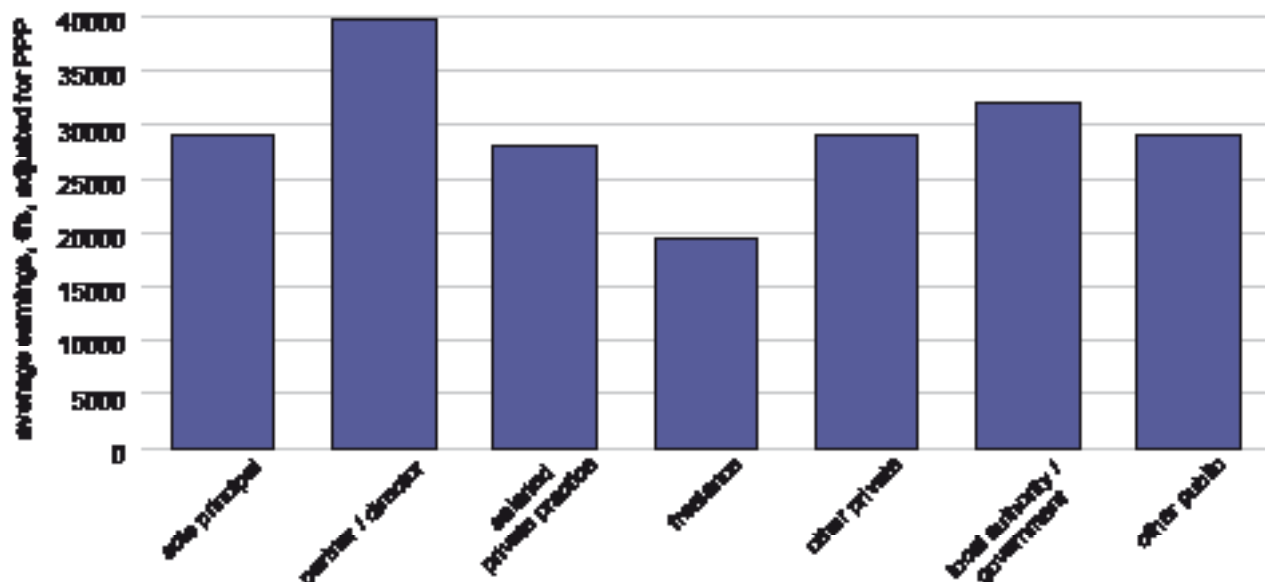
€s	sole principal	partner/director	ALL Principals	private practice salaried	freelance	other private	ALL private	local / central gov't	other public	ALL public
Austria	40,300	43,393	42,174	36,551	39,363	60,918	42,174	n/a	n/a	n/a
Belgium	40,250	40,250	40,250	42,487	26,699	26,834	26,834	36,896	31,306	33,989
Bulgaria	24,060	27,451	24,060	9,624	12,030	n/a	12,030	4,010	4,336	4,010
Croatia	16,378	15,710	16,270	19,885	14,824	21,693	18,078	19,162	26,032	21,693
Czech Republic	23,607	34,099	25,706	18,886	17,333	n/a	19,935	18,886	n/a	18,886
Denmark	43,961	49,161	47,270	42,543	n/a	45,474	44,434	37,816	44,339	40,180
Estonia *	9,125	25,349	11,660	17,110	n/a	n/a	12,776	n/a	n/a	n/a
Finland	39,936	55,911	49,521	33,946	n/a	29,233	35,942	39,137	41,534	39,936
France	27,100	37,940	28,907	34,327	22,584	29,359	27,100	33,604	43,102	40,650
Germany	48,356	58,027	48,356	35,977	38,685	52,708	44,468	48,356	48,356	48,356
Greece	21,030	23,659	21,030	13,880	10,515	13,880	18,165	19,979	21,030	19,979
Hungary *	12,474	11,708	12,474	12,146	n/a	21,884	12,474	19,696	16,413	17,538
Ireland	21,422	38,560	29,991	35,990	n/a	47,296	34,276	65,124	60,840	64,267
Italy	26,188	33,463	28,031	23,278	19,399	24,248	24,248	29,098	27,158	28,128
Lithuania *	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg *	45,939	61,526	53,322	67,268	25,431	41,017	46,267	n/a	n/a	n/a
Malta *	32,051	57,692	45,513	32,051	n/a	n/a	33,974	n/a	27,308	32,051
Poland	24,049	39,080	27,055	19,640	15,231	31,985	23,087	14,429	n/a	6,914
Portugal	14,857	16,343	16,000	12,114	12,400	13,600	13,714	17,739	20,743	18,480
Romania	18,978	11,955	14,272	9,225	n/a	6,778	11,296	n/a	2,391	2,391
Slovenia *	24,551	39,521	25,150	n/a	n/a	n/a	20,359	n/a	n/a	n/a
Spain *	31,057	18,480	24,641	n/a	15,400	27,105	20,534	n/a	n/a	n/a
Sweden	40,462	46,651	42,954	35,191	n/a	35,120	35,913	35,041	38,729	35,208
Turkey	44,963	41,504	43,925	17,985	23,692	23,519	24,902	24,902	21,582	24,211
United Kingdom	40,647	60,302	50,654	44,624	48,242	62,714	48,242	50,168	47,165	49,448
EUROPE - 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

Earnings data converted from local currencies to Euros, exchange rate as at 01.05.12 and then adjusted for PPP

CHART 4-3

Earnings by field of employment (adjusted for PPP)



Partners / Directors report the highest average earnings of any staffing group. Their average earnings are just under €40,000 (all figures in this section are adjusted for PPP). This is about €10,000 more than Sole Principals and Other Private architects' earnings. Salaried architects in private practice earn a PPP average of just over €28,000.

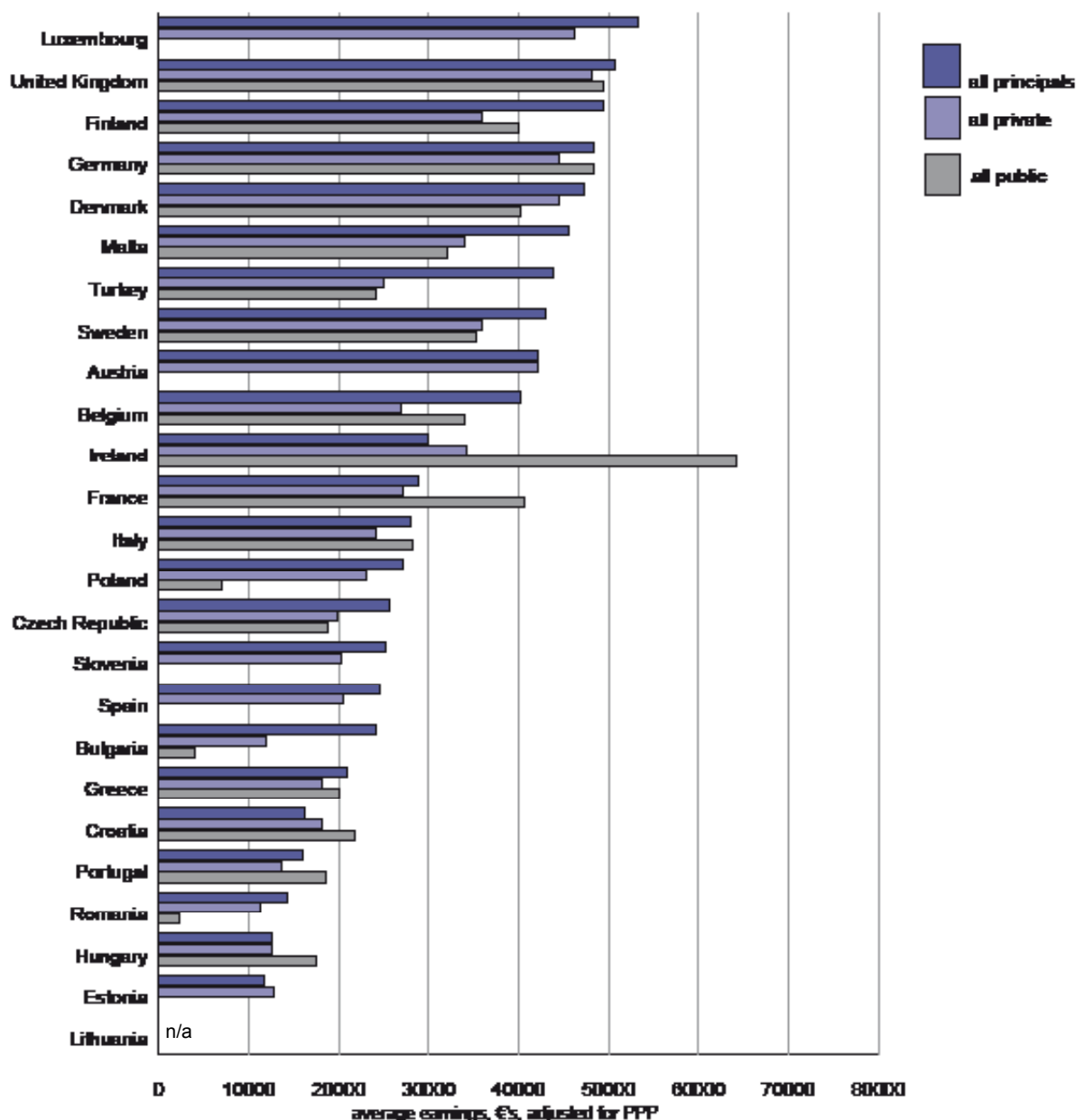
sector earnings are higher than private sector in eleven countries while the reverse is true in nine countries (in six countries, public sector earnings are not available due to small sample sizes). The differential between public and private earnings is particularly large in Ireland and France, where average earnings in the public sector are at least 50 per cent higher than private sector.

In the public sector, the average earnings for local and central government architects are €32,000. In previous surveys we recorded higher average earnings in the public sector than the private in most countries. This year that is no longer the default position; average public

Partners and Directors record the highest earnings (when adjusted for PPP) in Luxembourg, the UK, Germany, Malta and Finland, while highest average for Sole Principals are recorded in Germany, Luxembourg and Turkey.

CHART 4-4

Comparisons of average earnings of all Principals and all Public Architects (adjusted for PPP)



Earnings by Age

Architects' average earnings rise in line with age, peaking at age 60 to 64. The pattern is surprisingly consistent this year; each five year age group is higher than the previous one. The pattern repeats itself for lower and upper quartile figures, too.

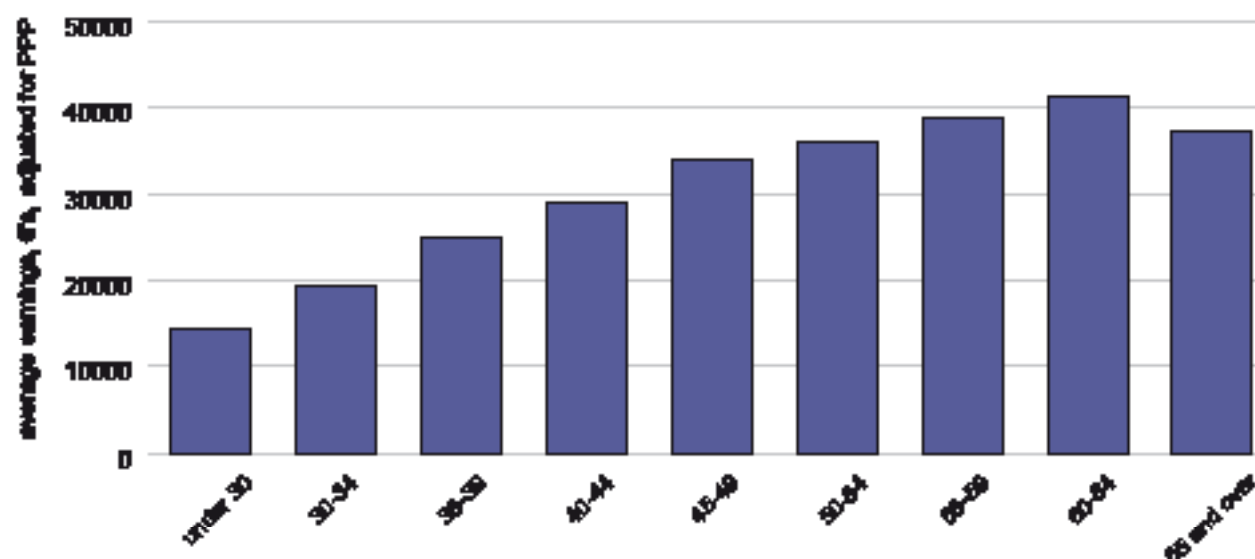
The age group recording peak earning values, age 60 to 64, is the same as in 2010 but 2008 peak earnings were recorded in the previous age group, age 55 to 59.

Compared with the 2010 average earnings, in 2012 earnings have fallen for the younger age groups but are higher for the older ones. For all ages up to age 45, average earnings are lower in 2012 than in 2010. From age 45 upwards, average earnings have increased this year. In all cases, figures quoted are based on data which has been adjusted for PPP.

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

€s	2012			2010 EUROPE-23 MEDIAN	2008 EUROPE-17 MEDIAN
	lower quartile	MEDIAN	upper quartile		
<30	5,820	14,549	25,918	15,615	17,041
30-34	10,971	19,399	31,688	24,550	29,214
35-39	14,549	24,902	38,870	30,075	34,677
40-44	17,459	29,098	43,647	33,364	38,760
45-49	19,399	33,800	48,497	33,364	39,729
50-54	19,903	36,081	57,012	34,317	42,391
55-59	20,093	38,797	58,196	35,119	43,647
60-64	22,921	41,370	60,302	40,875	41,890
65+	21,718	37,354	58,196	36,095	n/a

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



Earnings by Gender

The survey results suggest - as in previous years - that there is a significant differential between the earnings of men and women in the profession. The average full-time earnings of men (adjusted for PPP) are 43 per cent higher than those of full-time women architects. This differential is a little lower than the 47 per cent recorded in 2010 and 46 per cent in 2008.

The average earnings of architects working part-time record a 42 per cent differential, against 47 per cent in 2010.

While average full-time earnings of both male and female architects have fallen between 2010 and 2012, female architects record a smaller fall, of 1 per cent, compared with 4 per cent amongst male architects.

CHART 4-6

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

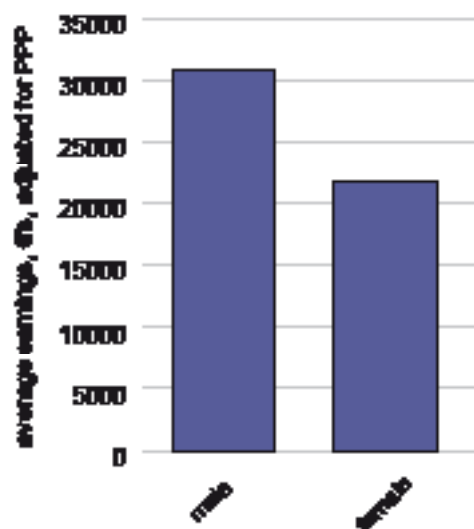


TABLE 4-4

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

€s		2012			2010 EUROPE-23 MEDIAN	2008 EUROPE-17 MEDIAN
		lower quartile	MEDIAN	upper quartile		
Full time	male	17,459	30,948	48,497	32,149	38,760
	female	10,840	21,680	36,134	21,866	26,620
Part time FTE	male	17,180	34,099	63,652	37,936	30,431
	female	12,124	24,137	42,346	25,862	24,225

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

Working in another country

Only a very small proportion of architects, 3 per cent, work or reside in a different country from the one in which they are registered. This is a similar proportion to that recorded in 2010, but lower than the 2008 figure.

Countries with the highest proportion of architects working in a different country are the United Kingdom (15 per cent), Ireland (13 per cent), Portugal (9 per cent) and Poland (7 per cent).

In four countries, more than half of respondents say they have “seriously” considered working in another country during the previous 12 months. These countries are: Spain, Slovenia, Portugal and Greece. In Spain, as many as 70 per cent of respondents say they have seriously considered working in another country. Fewer than 15 per cent of responding architects in France and Sweden have considered working in another country.

TABLE 4-5

Proportion of architects working / resident in a different country from the one in which they are registered

per cent	architects working / resident in different country from the one in which registered (%)
Austria	1.1
Belgium	0.2
Bulgaria	3.3
Croatia	1.0
Czech Republic	1.7
Denmark	2.6
Estonia *	0.0
Finland	2.7
France	2.1
Germany	3.4
Greece	1.3
Hungary *	1.7
Ireland	12.7
Italy	0.7
Lithuania *	0.0
Luxembourg *	3.4
Malta *	2.5
Poland	7.7
Portugal	9.0
Romania	1.8
Slovenia *	2.9
Spain *	1.1
Sweden	2.3
Turkey	4.1
United Kingdom	14.6
EUROPE - 25***	2.9
2010 EUROPE-23***	3.4
2008 EUROPE-17***	7.0

TABLE 4-6

Proportion of responding architects who have “seriously considered working in another country” in the last 12 months

per cent	have seriously considered working in another country, last 12 months (%)
Austria	23
Belgium	25
Bulgaria	27
Croatia	29
Czech Republic	19
Denmark	20
Estonia *	16
Finland	15
France	13
Germany	21
Greece	57
Hungary *	38
Ireland	37
Italy	40
Lithuania *	18
Luxembourg *	28
Malta *	32
Poland	29
Portugal	59
Romania	32
Slovenia *	62
Spain *	70
Sweden	12
Turkey	40
United Kingdom	22
EUROPE - 25***	35
2010 EUROPE-23**	n/a
2008 EUROPE-17**	n/a

* caution - small sample

** question was not asked in 2010 or 2008

*** EUROPE - 25 figure is a weighted average and takes account of the number of architects in each participating country

Main concerns about working in another country

It appears that the main concerns about working in another country are practical, relocation or personal issues; 66 per cent of responding architects cite these as a major concern of working in another country. The proportion is lowest (35 per cent) amongst Spanish respondents (70 per cent of whom had seriously considered working in another country). Insufficient language and technical skills are seen as a major concern by 39 and 35

per cent respectively. More than half of Spanish and British respondents cite language skills as an issue. Only 11 per cent of respondents overall perceive architectural qualification issues to be a major concern (highest amongst respondents from Turkey, Romania and Spain). The inability to get work is a major concern for 19 per cent of respondents, with the highest proportions from respondents in Bulgaria, Greece, Lithuania, Turkey, Spain and Portugal.

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
Austria	14	21	36	9	71
Belgium	8	26	43	9	73
Bulgaria	38	34	39	12	46
Croatia	20	22	36	15	78
Czech Republic	23	49	47	7	61
Denmark	17	13	22	6	79
Estonia *	30	41	54	11	63
Finland	16	19	38	5	77
France	18	44	45	10	66
Germany	6	34	44	10	74
Greece	38	21	32	9	73
Hungary *	15	46	28	12	58
Ireland	32	45	36	5	70
Italy	11	38	23	6	76
Lithuania *	59	29	41	6	59
Luxembourg *	15	13	37	15	60
Malta *	30	5	49	14	62
Poland	29	49	47	13	42
Portugal	36	24	26	10	63
Romania	26	21	33	20	75
Slovenia *	29	17	31	6	71
Spain *	37	56	45	17	35
Sweden	9	13	16	6	84
Turkey	38	41	29	32	43
United Kingdom	28	54	45	13	66
EUROPE - 25	19	39	35	11	66
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

* question was not asked in 2010 or 2008

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	1	6	32	32	10	2	2	14
Belgium	2	2	4	22	39	15	6	1	2	8
Bulgaria	0	1	4	26	21	11	5	3	5	23
Croatia	0	1	3	24	36	10	5	1	0	20
Czech Republic	0	0	1	18	24	18	6	3	1	27
Denmark	0	0	0	11	56	21	6	1	1	5
Estonia *	0	0	4	10	25	22	10	4	0	25
Finland	0	0	1	35	45	9	2	0	0	7
France	1	0	2	24	39	15	5	1	2	12
Germany	0	0	2	13	58	13	4	0	1	8
Greece	0	0	2	22	40	9	4	2	1	20
Hungary *	1	1	3	28	18	19	4	3	2	22
Ireland	0	0	1	10	36	19	7	2	3	20
Italy	0	0	1	12	30	18	6	2	2	28
Lithuania *	0	0	5	23	27	14	5	9	0	18
Luxembourg *	1	0	10	22	36	9	2	1	1	17
Malta *	0	5	7	22	37	12	5	0	2	10
Poland	1	1	3	12	28	14	7	5	3	26
Portugal	1	1	3	10	25	9	5	2	6	39
Romania	1	2	6	26	20	13	5	1	2	25
Slovenia *	0	3	0	24	14	14	8	3	3	32
Spain *	0	0	0	0	37	23	7	3	2	29
Sweden	0	0	1	16	62	14	3	1	1	2
Turkey	8	17	16	19	12	5	2	1	1	20
United Kingdom	0	1	4	13	39	17	7	2	2	15
EUROPE - 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

CHART 4-7

Age at which Architects expect to retire

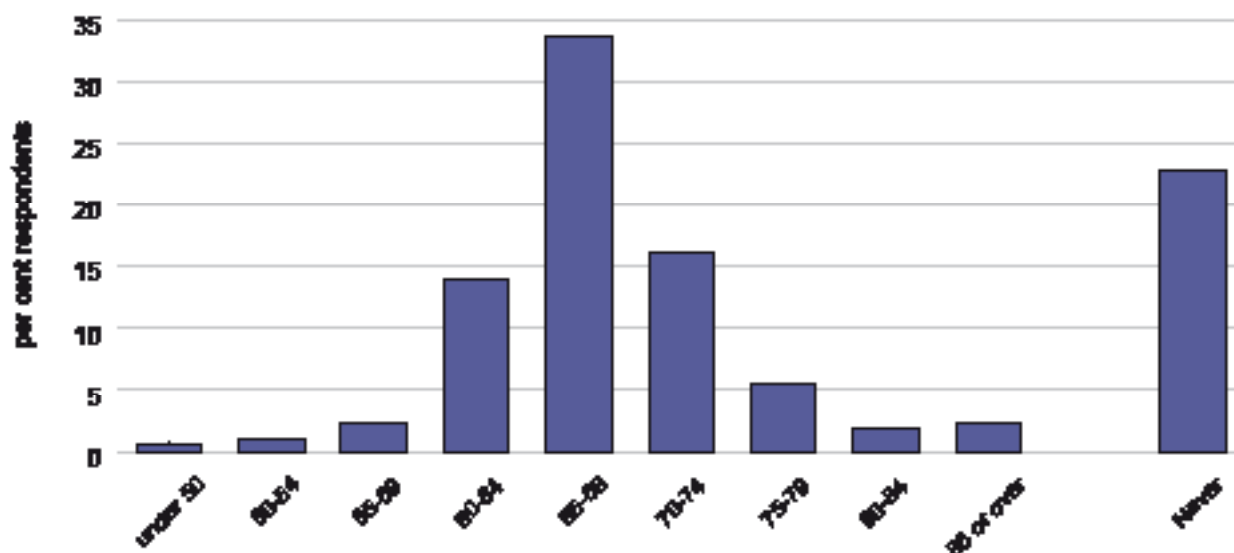


TABLE 4-9

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	41	7	3	0
Belgium	24	46	23	5	2
Bulgaria	54	24	13	3	6
Croatia	42	43	12	2	1
Czech Republic	45	45	8	0	0
Denmark	43	41	12	2	1
Estonia *	47	44	9	0	0
Finland	35	53	8	4	1
France	32	45	17	4	1
Germany	39	43	12	4	2
Greece	34	38	24	3	1
Hungary *	51	35	11	3	1
Ireland	26	45	20	6	3
Italy	32	39	21	6	2
Lithuania *	48	38	14	0	0
Luxembourg *	36	41	15	5	3
Malta *	31	54	13	3	0
Poland	48	38	10	2	2
Portugal	30	28	24	14	3
Romania	55	31	11	2	1
Slovenia *	26	41	21	12	0
Spain *	30	28	30	9	3
Sweden	40	45	10	4	1
Turkey	51	35	9	4	1
United Kingdom	37	43	13	5	2
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

CHART 4-8

Likelihood of continuing to work as an Architect until retirement



The most common age at which architects expect to retire is 65 to 69; 34 per cent say they expect to retire then. Fourteen per cent expect to retire at age 60 to 64. But most of the remainder - 26 per cent - expect to retire in their seventies or beyond. A further 23 per cent think they will 'never' retire.

Architects now expect to retire at an older age than they did in the 2010 or 2008 surveys. In 2008, 16 per cent thought they would retire from age 70 onwards; now the proportion is 26 per cent. And the proportion expecting to retire in their fifties has fallen from 11 per cent in 2008 to 3 per cent now. More architects expect 'never' to retire: the proportion has almost doubled, from 12 per cent in 2008 to 23 per cent in 2012. Overall, including those who respond 'never', 49 per cent of architects plan to work until at least age 70, compared with 28 per cent in 2008.

Hours Worked

TABLE 4-10

Average 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	51.1	50.5	40.9	42.7	44.1	39.2	45.0
Belgium	53.7	54.5	46.8	46.6	47.3	38.0	39.5
Bulgaria	48.3	46.0	42.1	52.8	40.0	40.0	41.4
Croatia	45.9	44.9	40.0	44.4	43.6	40.0	41.2
Czech Republic	47.6	48.3	42.9	47.9	41.3	40.0	42.5
Denmark	43.0	45.4	37.3	39.8	38.2	37.0	38.1
Estonia *	44.3	42.6	39.8	42.5	n/a	n/a	n/a
Finland	45.3	43.9	37.9	n/a	38.7	36.8	37.2
France	50.4	48.5	46.4	48.6	48.9	37.9	40.5
Germany	50.6	50.1	40.3	47.5	40.6	40.1	40.1
Greece	47.6	45.6	41.8	45.2	41.7	40.0	39.8
Hungary *	45.6	42.2	41.5	40.9	46.0	39.6	40.8
Ireland	43.0	44.8	38.6	38.8	41.5	36.0	37.4
Italy	43.0	44.1	41.8	40.8	40.2	36.4	37.1
Lithuania *	42.5	46.7	45.0	40.0	40.0	39.0	n/a
Luxembourg *	50.2	48.7	48.5	45.7	48.8	n/a	n/a
Malta *	52.9	46.3	42.3	55.0	57.5	56.7	40.0
Poland	48.4	50.1	40.8	42.5	41.2	41.9	40.1
Portugal	43.8	43.1	40.0	41.3	41.6	36.0	38.5
Romania	43.8	44.0	41.8	43.0	44.9	40.0	44.5
Slovenia *	44.7	46.2	41.7	42.5	52.0	40.0	38.0
Spain *	45.5	42.7	40.0	46.5	44.7	60.0	36.0
Sweden	43.2	44.1	40.3	38.3	39.8	40.5	42.2
Turkey	51.2	49.7	45.8	49.6	42.2	40.8	40.3
United Kingdom	44.6	45.8	37.9	39.8	39.4	37.1	38.1
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

The number of hours worked by architects is higher in the private sector than the public sector. Sole Principals and Partners/Directors work on average 45 and 46 hours per week respectively, higher than in other employment fields. Private practice salaried architects record an average 43 hours; Freelancers 40 hours. Public sector architects average between 38 and 39 hours per week.

The longest average working hours reported by Sole Principals are in Belgium, Malta, Turkey, Austria, Germany, France and Luxembourg; each recording over 50 hours per week.

The average number of hours worked is similar to figures recorded in 2010 in the public sector, but lower for Sole Principals and Freelancers, and higher for private practice salaried architects.

TABLE 4-11

Difference between average hours contracted to work and average hours worked, by field of employment

number of hours	difference between contracted and worked hours per week
sole principal	3.5
partner / director	5.3
private practice salaried	3.9
freelance	4.3
other private	4.4
local / central government	2.8
other public	4.1
EUROPE - 25	3.9
2010 EUROPE-23	3.5
2008 EUROPE-17	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 7.0 out of 10. Satisfaction with quality of life and with the business environment (colleagues, fellow professionals, public planning bodies and so on) receive almost identical scores, of 5.6 and 5.7 out of ten respectively. Architects are least satisfied with the amount they are paid: this receives a satisfaction score of just 4.3 out of 10.

Architects in Sweden, Denmark and Finland generally have the highest satisfaction scores; while the lowest scores are often reported by architects in Italy, Ireland and Portugal.

Average satisfaction scores have fallen across the board, compared with the 2010 survey findings. While the scores in 2008 and 2010 were very similar, the latest 2012 scores have dropped by between 0.4 and 0.6 points in each of the four areas questioned.

CHART 4-9

 Professional satisfaction, ranked, highest first

satisfaction with ...

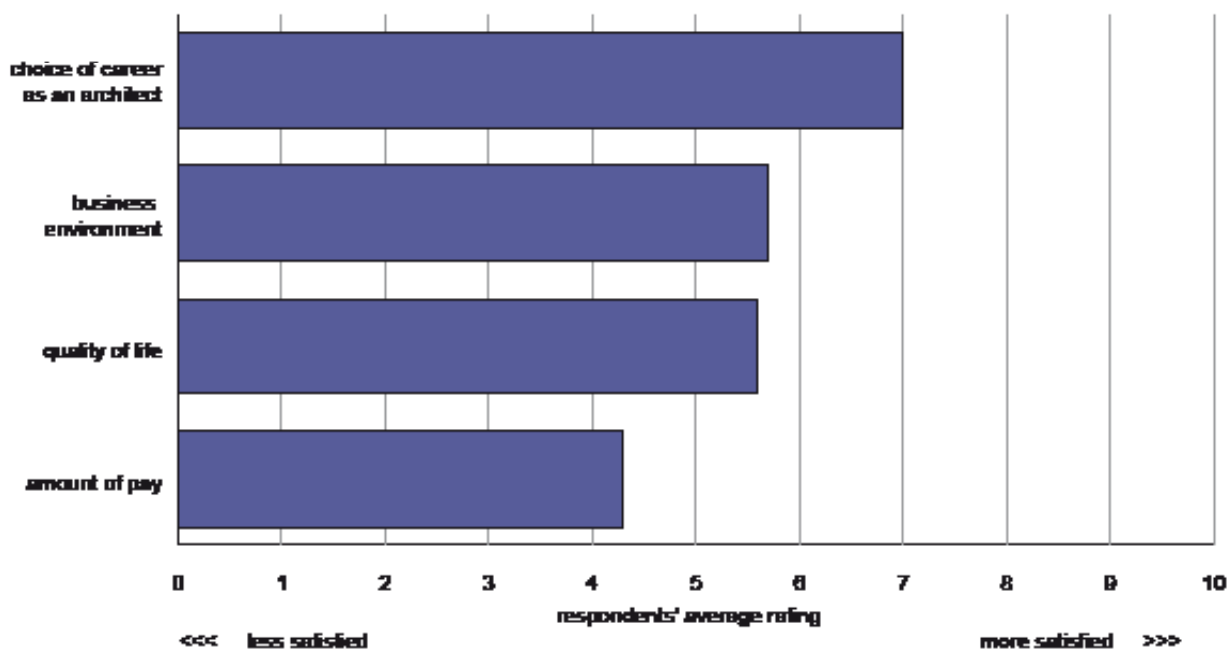


TABLE 4-12

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

score, 0 to 10 (10= very satisfied)	field of employment			ALL
	principal / director	other private	public	
Austria	7.9	7.8	6.7	7.8
Belgium	7.2	7.0	6.5	7.0
Bulgaria	8.0	7.0	6.7	7.4
Croatia	8.4	8.0	8.7	8.3
Czech Republic	7.5	7.1	7.1	7.3
Denmark	8.5	7.9	8.3	8.2
Estonia *	8.3	8.4	5.0	8.3
Finland	8.5	7.7	8.2	8.1
France	7.5	7.2	7.6	7.3
Germany	7.8	7.2	7.6	7.5
Greece	7.3	7.0	7.7	7.3
Hungary *	7.9	7.7	7.4	7.7
Ireland	6.8	6.3	7.2	6.7
Italy	6.8	6.3	6.4	6.5
Lithuania *	7.5	8.5	10.0	7.9
Luxembourg *	7.4	7.4	n/a	7.4
Malta *	6.6	7.8	6.4	7.1
Poland	7.0	6.4	6.5	6.7
Portugal	7.5	6.3	7.0	6.6
Romania	8.5	8.1	8.6	8.3
Slovenia *	8.1	6.6	3.0	7.1
Spain *	7.2	7.0	6.8	7.1
Sweden	8.6	8.1	8.1	8.2
Turkey	8.1	7.6	7.7	7.8
United Kingdom	7.5	6.9	7.2	7.2
EUROPE - 25	7.2	6.8	7.2	7.0
2010 EUROPE-23	7.7	7.4	7.7	7.6
2008 EUROPE-17	7.8	7.6	7.7	7.7

* caution - small sample

CHART 4-10

Satisfaction with choice of architecture
as a career

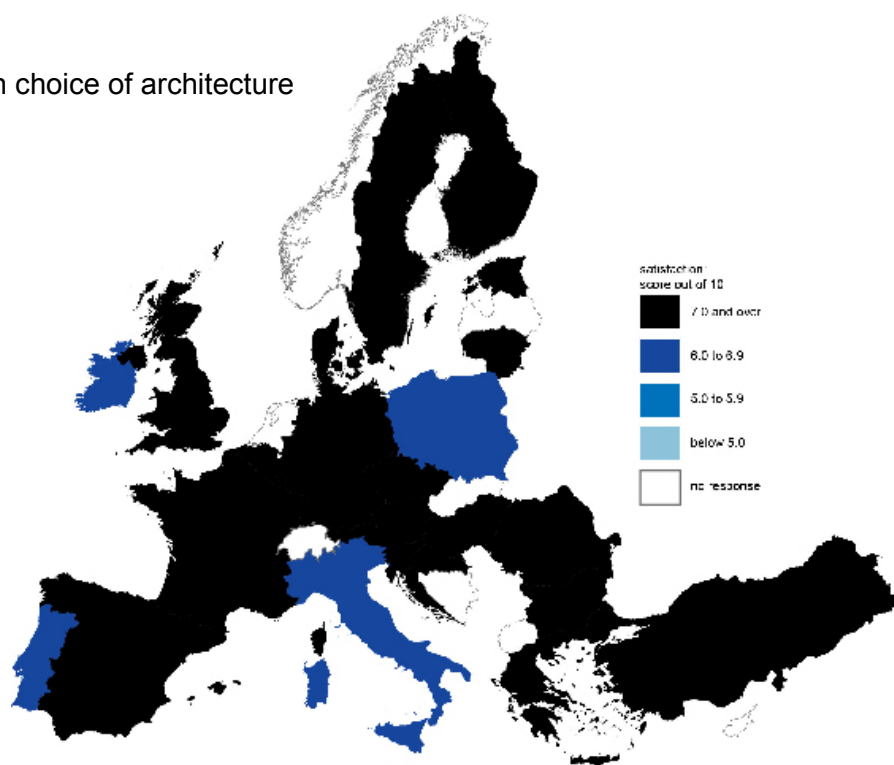


TABLE 4-13

Architects' satisfaction with the amount they are paid analysed by country and field of employment

score, 0 to 10 (10= very satisfied)	field of employment			ALL
	principal / director	other private	public	
Austria	4.6	5.4	5.4	4.7
Belgium	4.7	4.3	6.7	4.6
Bulgaria	4.2	4.1	3.9	4.2
Croatia	5.1	5.2	6.3	5.3
Czech Republic	5.2	4.6	4.9	4.8
Denmark	6.4	7.0	6.8	6.8
Estonia *	4.8	4.6	3.0	4.7
Finland	6.2	6.0	6.9	6.3
France	4.7	4.7	5.7	4.8
Germany	4.6	4.6	5.7	4.7
Greece	4.1	4.1	3.6	4.0
Hungary *	3.8	3.7	4.3	3.9
Ireland	3.1	4.0	6.4	3.9
Italy	4.0	3.7	4.3	3.9
Lithuania *	4.5	4.2	3.0	4.4
Luxembourg *	5.4	5.4	n/a	5.4
Malta *	4.3	5.1	3.3	4.4
Poland	4.0	4.1	3.8	4.0
Portugal	3.4	2.8	3.7	3.1
Romania	5.0	4.9	5.3	4.9
Slovenia *	3.6	3.3	2.5	3.4
Spain *	2.8	2.8	1.5	2.8
Sweden	6.4	6.6	6.6	6.6
Turkey	5.1	4.5	5.0	4.7
United Kingdom	4.5	4.4	5.0	4.5
EUROPE - 25	4.3	4.2	5.0	4.3
2010 EUROPE-23	4.6	4.8	5.5	4.8
2008 EUROPE-17	4.4	4.9	5.2	4.7

* caution - small sample

CHART 4-11

Satisfaction with amount paid

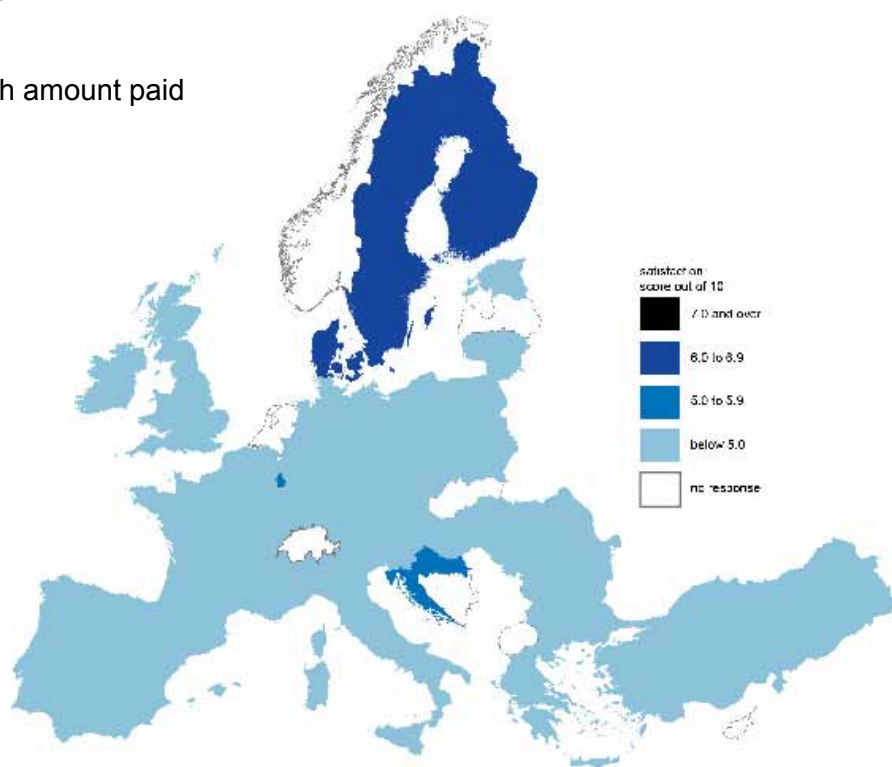


TABLE 4-14

Architects' satisfaction with their quality of life analysed by country and field of employment

score, 0 to 10 (10= very satisfied)	field of employment			ALL
	principal / director	other private	public	
Austria	6.0	6.6	5.5	6.1
Belgium	5.6	5.5	7.3	5.6
Bulgaria	4.8	4.5	4.1	4.6
Croatia	6.0	5.6	6.8	5.9
Czech Republic	6.6	6.4	6.7	6.5
Denmark	8.3	7.7	8.2	8.0
Estonia *	6.3	5.3	7.0	5.8
Finland	7.7	7.3	7.9	7.6
France	5.6	5.5	6.5	5.6
Germany	5.9	5.8	6.7	6.0
Greece	5.2	4.9	5.3	5.1
Hungary *	4.2	4.6	4.8	4.6
Ireland	5.5	5.1	7.0	5.6
Italy	5.4	5.0	5.4	5.2
Lithuania *	5.8	5.3	8.0	5.8
Luxembourg *	5.8	5.8	n/a	5.8
Malta *	5.0	5.5	5.4	5.3
Poland	4.8	4.7	4.4	4.7
Portugal	5.0	4.1	5.1	4.4
Romania	6.0	5.8	6.7	5.9
Slovenia *	5.6	4.5	3.5	5.0
Spain *	4.2	4.0	2.3	4.0
Sweden	7.8	7.2	7.5	7.4
Turkey	5.8	5.2	5.6	5.4
United Kingdom	6.4	5.8	6.5	6.1
EUROPE - 25	5.7	5.3	6.1	5.6
2010 EUROPE-23	6.0	6.0	6.9	6.1
2008 EUROPE-17	5.8	5.9	6.4	5.9

* caution - small sample

CHART 4-12

Satisfaction with quality of life

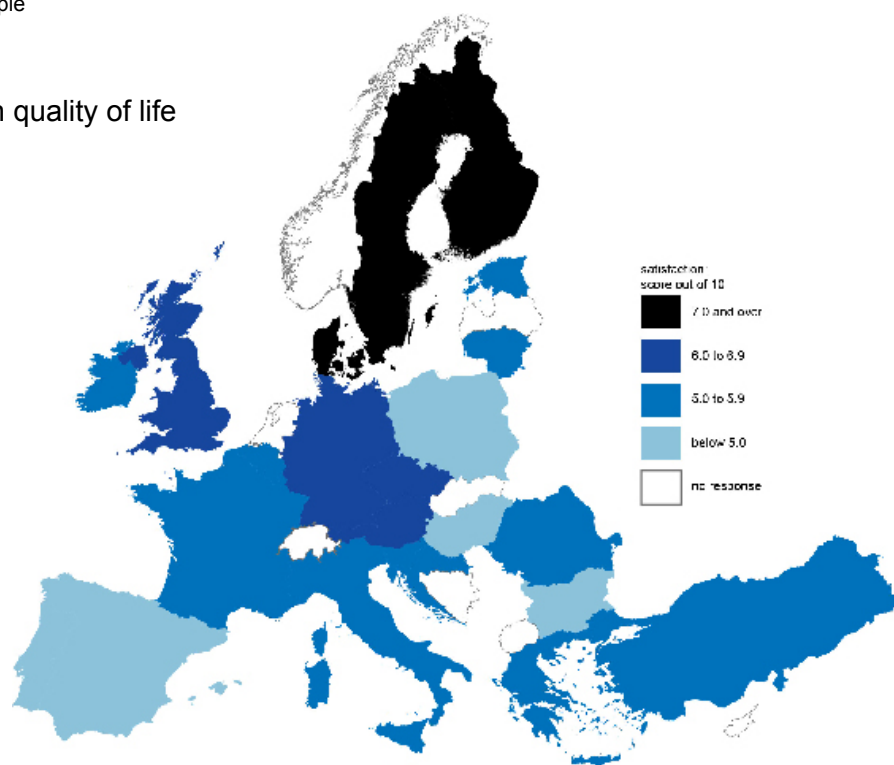


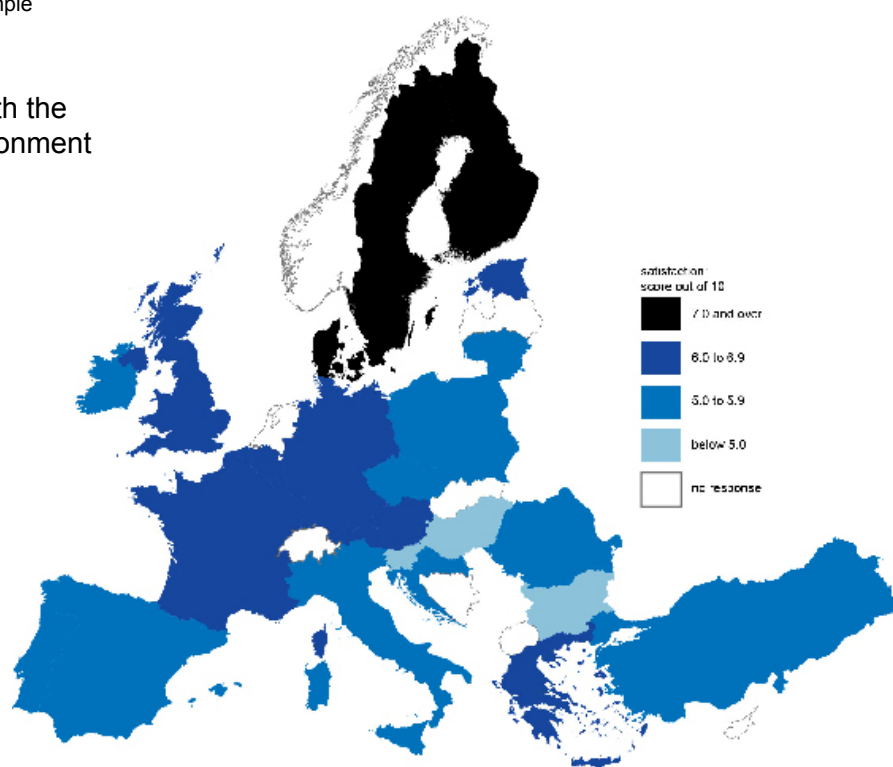
TABLE 4-15

Architects' satisfaction with the business environment in which they work - including colleagues, fellow professionals, public planning bodies etc. - analysed by country and field of employment

score, 0 to 10 (10= very satisfied)	field of employment			ALL
	principal / director	other private	public	
Austria	5.9	6.5	5.5	6.0
Belgium	6.3	6.4	6.4	6.4
Bulgaria	4.5	4.9	4.7	4.7
Croatia	4.8	5.0	5.5	5.0
Czech Republic	5.8	5.9	6.9	5.9
Denmark	7.7	7.1	7.5	7.4
Estonia *	7.5	6.4	8.0	6.9
Finland	6.6	7.0	7.2	7.0
France	6.2	6.1	6.0	6.1
Germany	6.3	7.0	6.6	6.6
Greece	6.0	6.0	5.8	6.0
Hungary *	3.8	4.2	4.4	4.1
Ireland	5.2	5.4	5.9	5.3
Italy	5.2	5.3	5.3	5.2
Lithuania *	6.0	5.3	4.0	5.7
Luxembourg *	6.1	6.3	n/a	6.1
Malta *	5.6	5.3	4.9	5.3
Poland	5.1	5.5	5.6	5.3
Portugal	6.3	5.6	5.9	5.8
Romania	5.3	5.3	6.7	5.4
Slovenia *	5.5	3.8	2.0	4.5
Spain *	4.7	5.2	5.3	5.0
Sweden	7.2	7.1	7.1	7.1
Turkey	5.8	5.4	5.4	5.6
United Kingdom	6.2	6.0	5.9	6.1
EUROPE - 25	5.5	5.7	6.0	5.7
<i>2010 EUROPE-23</i>	<i>5.9</i>	<i>6.1</i>	<i>6.5</i>	<i>6.1</i>
<i>2008 EUROPE-17</i>	<i>6.0</i>	<i>6.4</i>	<i>6.4</i>	<i>6.2</i>

* caution - small sample

CHART 4-13
Satisfaction with the business environment



Continuing Professional Development (CPD)

This is a new part of the research for 2012. There is a significant variation in results from different countries. The average number of hours of CPD currently undertake per year varies from an average of zero hours CPD by architects in Turkey, to 100 or more in Spain and Bulgaria. Even amongst neighbouring countries there can be huge disparity; Belgium's architects report an average of 40 hours' CPD a year compared with 24 amongst architects in France; while architects' average figure of 25 hours in Portugal is only a quarter of that of Spanish architects.

Likewise, personal expenditure varies hugely. The average across Europe is €300 per year, but the range is between an average of €1344 spent by Danish architects to nothing, spent in several countries including Sweden, the UK and Poland. The personal expenditure specifically excludes costs paid by your employer or business, although when we attempted to quantify these costs from practices, the figures are negligible (see costs in Table 3.9 above).

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

	average (median) number hours CPD per year	personal expenditure on CPD, €s per year (unadjusted for PPP)
Austria	50	1000
Belgium	40	600
Bulgaria	120	409
Croatia	30	267
Czech Republic	22	201
Denmark	37	1344
Estonia *	20	500
Finland	27	400
France	24	800
Germany	40	500
Greece	60	500
Hungary *	58	130
Ireland	40	400
Italy	35	400
Lithuania *	30	130
Luxembourg *	24	250
Malta *	25	200
Poland	40	0
Portugal	25	110
Romania	24	0
Slovenia *	40	195
Spain *	100	400
Sweden	30	0
Turkey	0	0
United Kingdom	40	0
EUROPE - 25	38	300
2010 EUROPE-23**	n/a	n/a
2008 EUROPE-17**	n/a	n/a

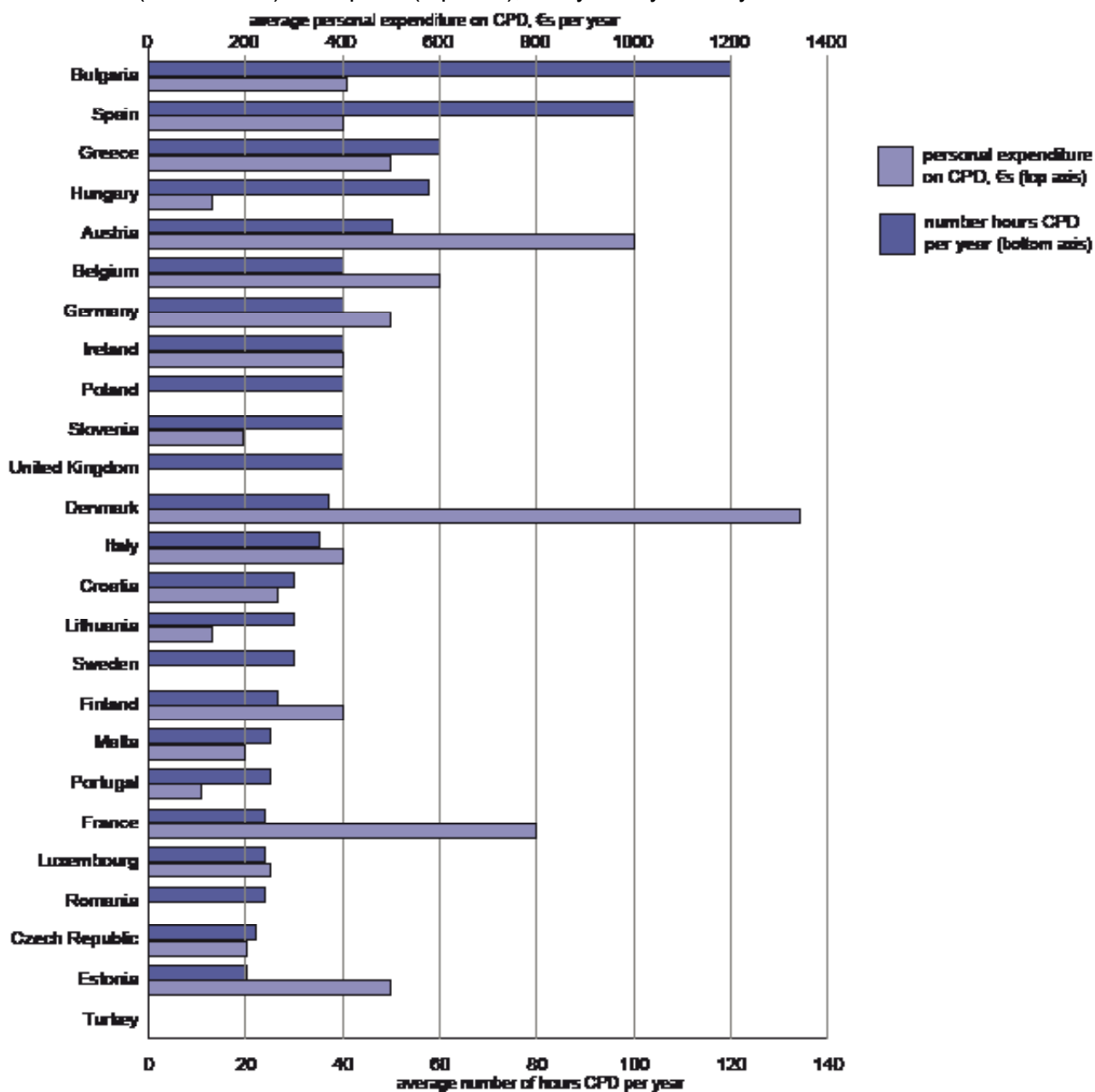
* caution small sample

** question was not asked in 2010 or 2008

TABLE 4-17
CPD hours and spend, analysed by field of employment

	average (median) number hours CPD per year	personal expenditure on CPD, €s per year (unadjusted for PPP)
sole principal	40	500
partner / director	40	366
private practice salaried	32	40
freelance	30	300
other private	32	200
local / central government	36	0
other public	30	0
EUROPE - 25	38	300

CHART 4-14
CPD hours (bottom axis) and spend (top axis), analysed by country



Building to Nearly Zero Energy Standard

This topic formed part of the 'sponsored questions' in the 2010 survey, but has been brought in to the main survey for 2012.

The latest figures suggest there has been very little change in the perception of the importance of energy efficiency since the 2010 survey, and indeed in the demand for such buildings; in 2010 12 per cent of architects said they were being asked to design to Nearly Zero Energy standards more than 50 per cent of the time; in 2012 the figure is 13 per cent, a statistically insignificant change.

There is also no improvement in how competent architects feel to design a Nearly Zero building; the proportion has actually fallen, from 60 per cent in 2010 to 57 per cent now. Architects in Luxembourg and Austria feel the most competent - more than 80 per cent make that claim. It is significant that in these two countries have the highest current demand - in both, more than 30 per cent of architects say they are being asked to design to Nearly Zero Energy standards more than 50 per cent of the time.

CHART 4-15

Agreement with the statement "energy efficiency is the key driver in the design of buildings today"

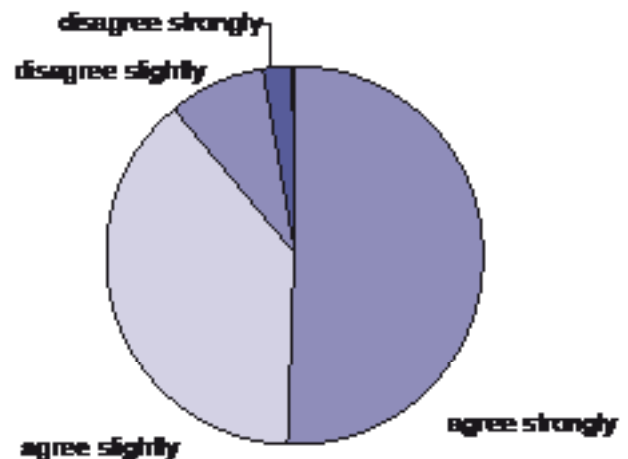


CHART 4-16

Proportion of respondents who feel they are "competent" or "very competent" to design a Nearly Zero Energy building

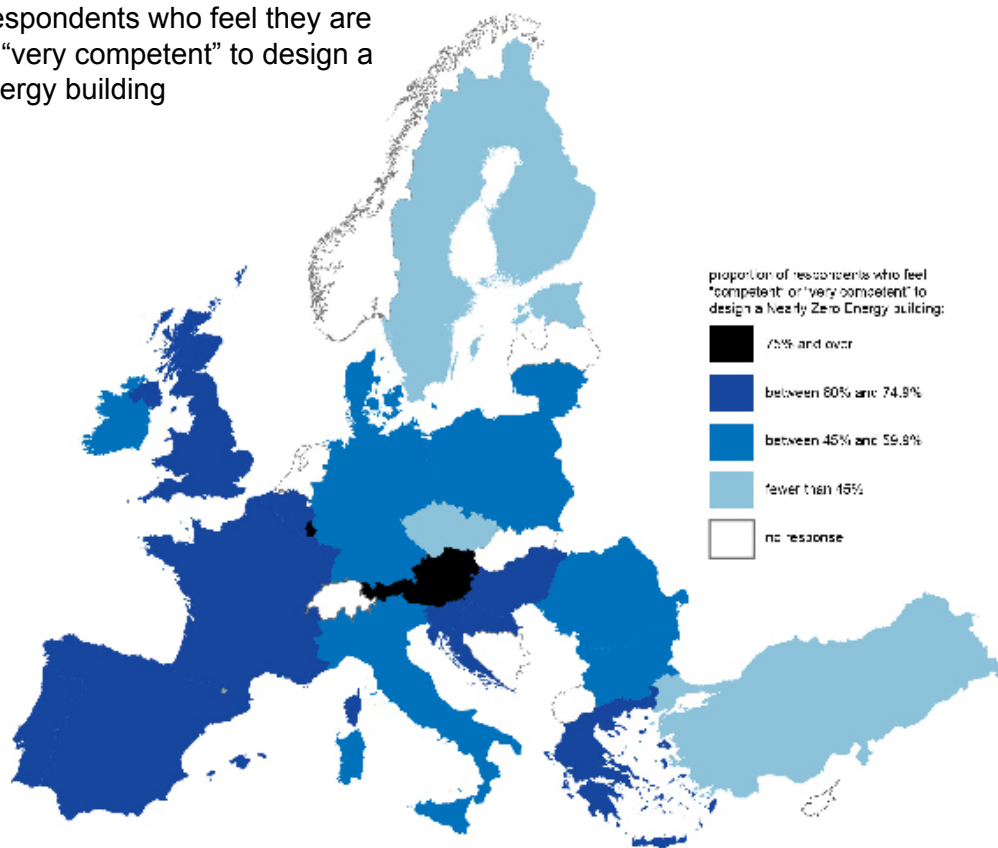


CHART 4-17

Competence to design a Nearly Zero Energy building



CHART 4-18

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

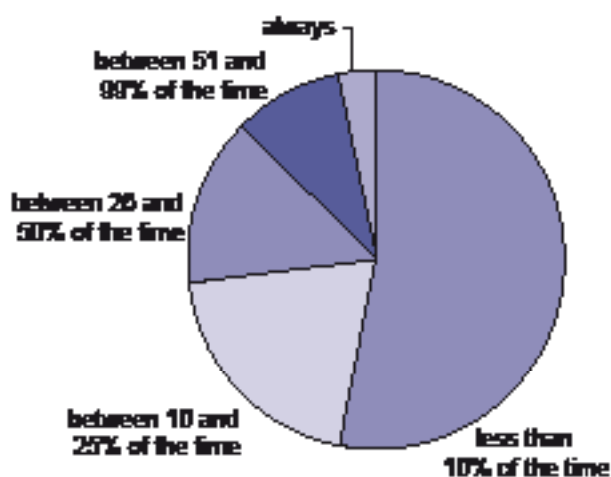


TABLE 4-18

Building to Nearly Zero Energy standards, summary table, analysed by country

per cent respondents	agree strongly that energy efficiency is the key driver in the design of buildings today	feel "competent" or "very competent" to design a Nearly Zero building	currently being asked to design to Nearly Zero Energy standards more than 50% of the time
Austria	29	82	31
Belgium	59	65	13
Bulgaria	30	46	4
Croatia	18	63	4
Czech Republic	14	44	6
Denmark	46	50	13
Estonia *	8	45	6
Finland	23	37	14
France	64	61	18
Germany	22	53	15
Greece	67	65	13
Hungary *	57	66	8
Ireland	50	55	6
Italy	70	59	14
Lithuania *	29	55	0
Luxembourg *	55	87	40
Malta *	54	54	2
Poland	21	48	5
Portugal	52	61	15
Romania	60	58	13
Slovenia *	32	68	14
Spain *	56	70	9
Sweden	52	32	4
Turkey	50	33	9
United Kingdom	48	61	8
EUROPE - 25	51	57	13
2010 EUROPE-23	50	60	12
2008 EUROPE-17*	n/a	n/a	n/a

* caution small sample

** question was not asked in 2008



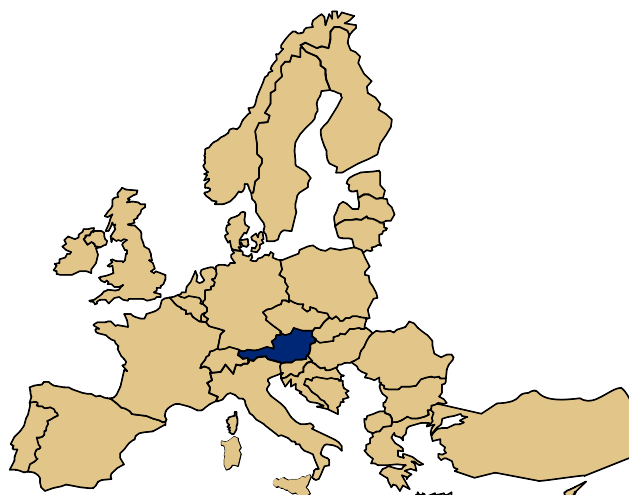
Section 2: Country Factsheets

Section 2 Contents

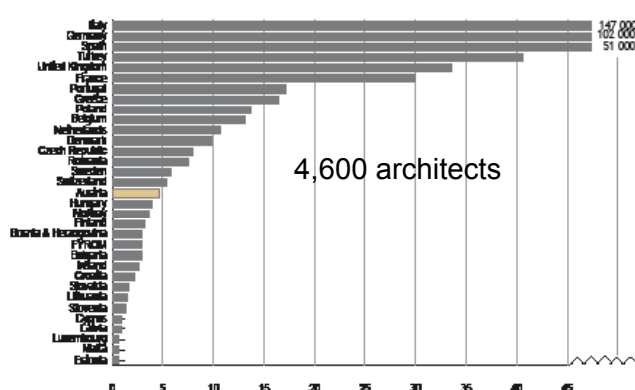
	page:
Austria	74
Belgium	76
Bulgaria	78
Croatia	80
Czech Republic	82
Denmark	84
Estonia	86
Finland	88
France	90
Germany	92
Greece	94
Hungary	96
Ireland	98
Italy	100
Latvia	102
Lithuania	104
Luxembourg	106
Malta	108
Netherlands	110
Poland	112
Portugal	114
Romania	116
Slovakia	118
Slovenia	120
Spain	122
Sweden	124
Turkey	126
United Kingdom	128

This year we present a profile for each country which has participated at least once in the three ACE Sector Studies, 2008 to 2012. Three of the above countries have not participated in 2012.

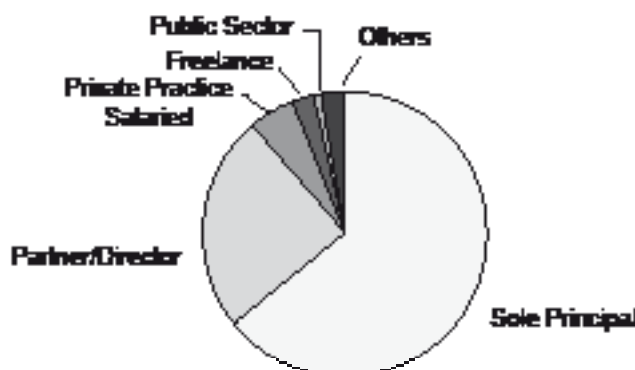
Austria



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	8,331,930	8,375,290	8,443,018
GDP, € millions	283,085	279,607	300,712
GDP per head	33,976	33,385	35,617
Construction output, € m	37,131	35,830	39,574
Construction as % GDP	13	13	13

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	3,800	4,500	4,600
Number of architects per 1000 population	0.5	0.5	0.5
Number male architects	3,230	3,783	3,750
Number female archts	570	717	850
Number aged under 40	912	760	820

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	297	256	263
Average revenue per:			
2 person practice	198,915	148,967	107,774
6 to 10 person practice	457,591	614,141	643,469

Private Practice

	2008	2010	2012
Number of practices	1,773	1,476	1,640
estimated number practices with -			
1 architectural staff	985	896	754
2-5 architectural staff	679	501	784
6-30 architectural staff	109	76	102
31+ architectural staff	0	2	0

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	66	65	64
Partners / Directors	30	22	25
Private practice Salaried	3	5	5
Private in-house	0	1	0
Freelance	0	2	2
Other Private	1	2	2
Local / central govt	0	1	1
Other Public	0	2	0

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	8.2	7.8	7.8
Pay:	4.2	4.2	4.7
Quality of life:	6.0	5.9	6.1
Business environment:	6.1	5.9	6.0

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	33	35	37
by clients	66	69	62

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	87.5	99.7	98.9
Another country	12.5	0.3	1.1
Per cent seriously considered working in another country	n/a	n/a	23

Earnings

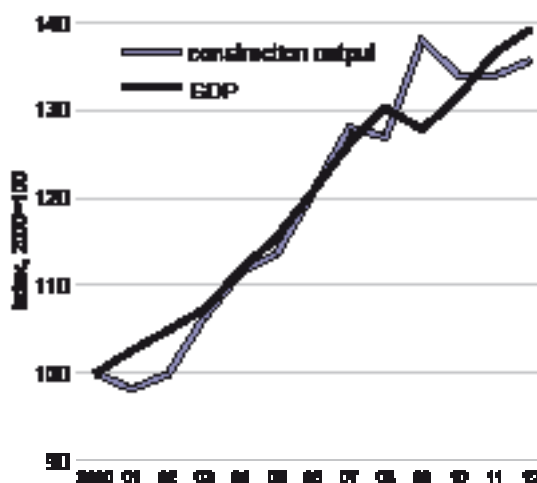
	average earnings €s *		
	2008	2010	2012
Sole Principals	50,000	40,000	43,000
Partners / Directors	40,000	42,000	46,300
Private practice Salaried	n/a	40,000	39,000
Freelance	n/a	40,000	42,000
Other Private	n/a	52,500	65,000
Local / central govt	n/a	n/a	105,000
Other Public	n/a	n/a	45,000
ALL	48,000	42,000	45,000

* earnings values are unadjusted for PPP

Working Hours

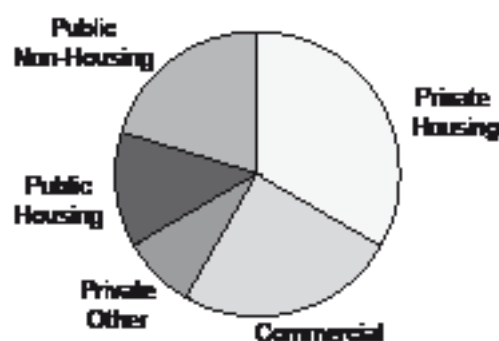
	average number hours worked per week		
	2008	2010	2012
Sole Principal	54.0	49.0	51.1
Partner / director	51.3	47.3	50.5
Private practice Salaried	48.8	45.8	40.9
Freelance	n/a	39.6	42.7
Local / central govt	n/a	n/a	39.2

GDP & Construction Output



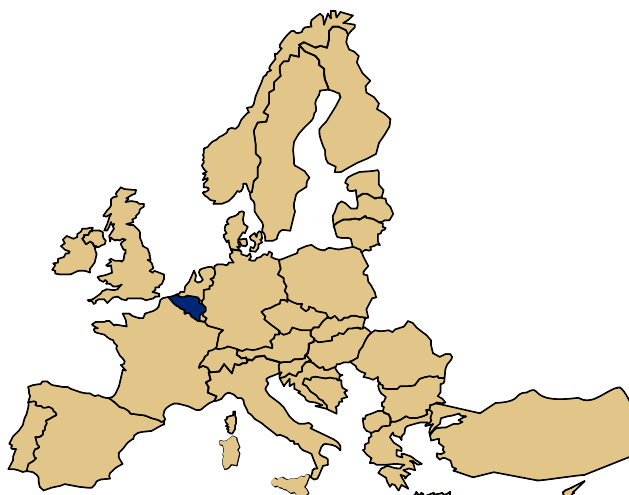
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	526	3,653	3,406
Number of participants	160	672	583
Response rate	30%	18%	17.1
Accuracy of results at 95% confidence level	+/-8%	+/-4%	+/-3.8



Social & Economic

	2008	2010	2012*
Population	10,666,866	10,827,000	11,041,266
GDP, € millions	345,006	349,122	369,836
GDP per head	32,344	32,246	33,496
Construction output, € m	56,278	53,699	56,135
Construction as % GDP	16	15	15

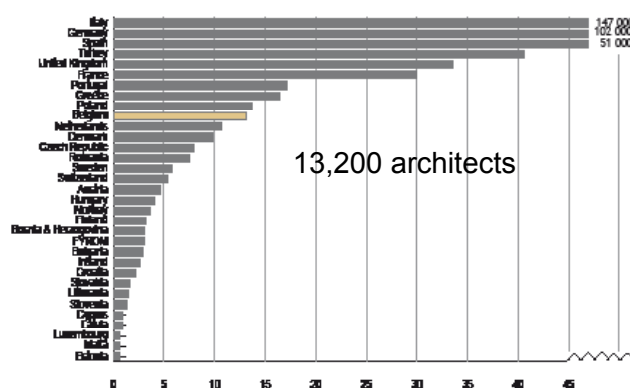
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	11,500	13,000	13,200
Number of architects per 1000 population	1.1	1.2	1.2
Number male architects	8,740	9,918	9,460
Number female archts	2,760	3,082	3,740
Number aged under 40	6,210	5,775	7,220

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	327	556	529
Average revenue per:			
2 person practice	88,979	116,434	78,786
6 to 10 person practice	171,167	613,153	439,862

Private Practice

	2008	2010	2012
Number of practices	3,894	4,167	3,709
estimated number practices with -			
1 architectural staff	2,403	2,641	2,241
2-5 architectural staff	1,288	1,258	1,112
6-30 architectural staff	187	260	352
31+ architectural staff	16	8	4

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	21	21	15
Partners / Directors	12	11	8
Private practice Salaried	8	7	7
Private in-house	0	0	0
Freelance	22	25	30
Other Private	28	29	33
Local / central govt	6	2	3
Other Public	3	4	4

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.2	6.8	7.0
Pay:	4.3	4.0	4.6
Quality of life:	5.8	5.5	5.6
Business environment:	6.5	6.1	6.4

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	26	21	24
by clients	51	51	52

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	95.8	98.4	99.8
Another country	4.2	1.6	0.2
Per cent seriously considered working in another country	n/a	n/a	25

Earnings

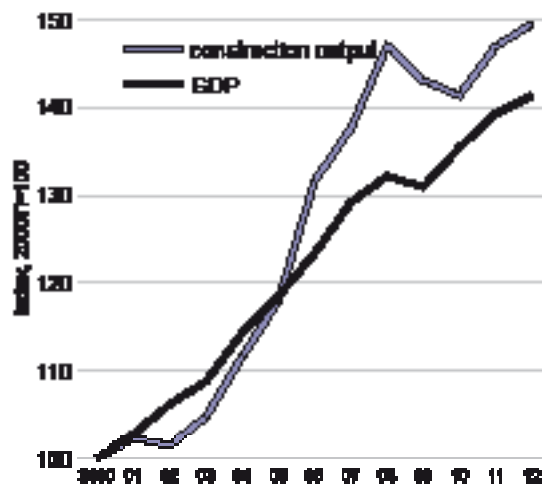
	average earnings €s *		
	2008	2010	2012
Sole Principals	30,600	30,000	45,000
Partners / Directors	24,000	45,000	45,000
Private practice Salaried	24,000	40,000	47,500
Freelance	30,000	30,000	29,850
Other Private	31,000	30,000	30,000
Local / central govt	28,500	41,891	41,250
Other Public	n/a	45,000	35,000
ALL	30,000	32,330	31,700

* earnings values are unadjusted for PPP

Working Hours

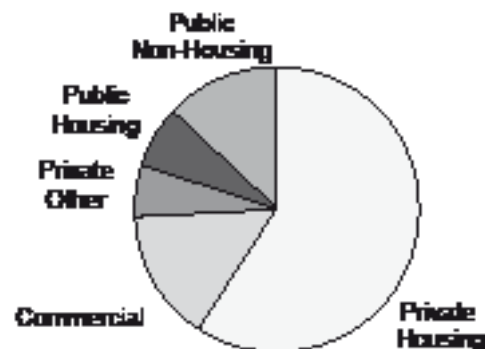
	average number hours worked per week		
	2008	2010	2012
Sole Principal	53.5	47.7	53.7
Partner / director	58.3	49.7	54.5
Private practice salaried	49.8	48.5	46.8
Freelance	45.1	41.4	46.6
Local / central govt	43.0	33.2	38.0

GDP & Construction Output



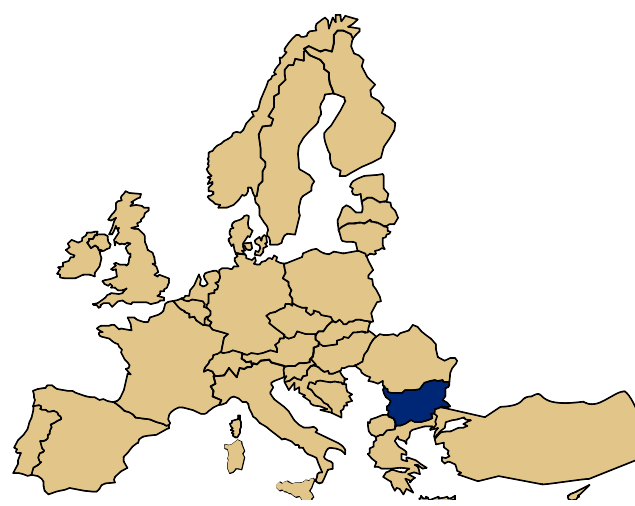
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	2,101	10,378	6,374
Number of participants	318	756	446
Response rate	15%	7%	7.0
Accuracy of results at 95% confidence level	+/-5%	+/-3%	+/-4.6



Social & Economic

	2008	2010	2012*
Population	7,640,238	7,563,710	7,327,224
GDP, € millions	35,431	35,558	38,483
GDP per head	4,637	4,701	5,252
Construction output, € m	6,562	3,258	4,859
Construction as % GDP	19	9	13

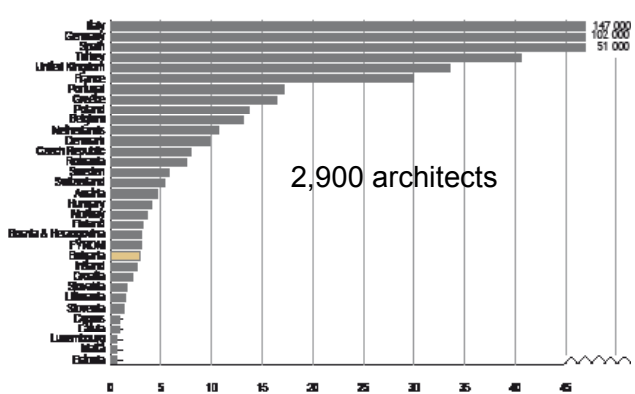
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	n/a	2,900	2,900
Number of architects per 1000 population	n/a	0.4	0.4
Number male architects	n/a	1,440	1,300
Number female archts	n/a	1,460	1,600
Number aged under 40	n/a	1,305	1,200

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



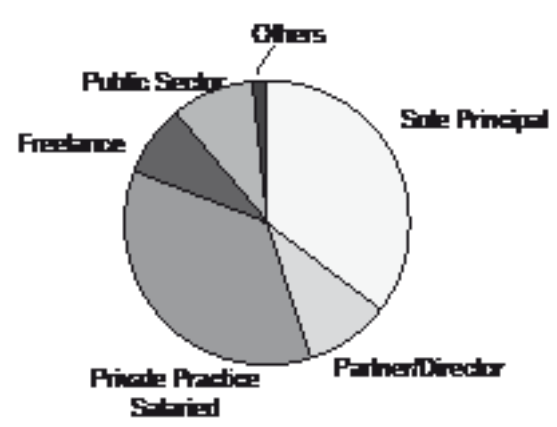
Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	46	27
Average revenue per:			
2 person practice	n/a	52,452	17,783
6 to 10 person practice	n/a	92,183	76,255

Private Practice

	2008	2010	2012
Number of practices	n/a	763	930
estimated number practices with -			
1 architectural staff	n/a	387	457
2-5 architectural staff	n/a	302	416
6-30 architectural staff	n/a	73	56
31+ architectural staff	n/a	0	1

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	33	36
Partners / Directors	n/a	9	10
Private practice Salaried	n/a	37	36
Private in-house	n/a	0	1
Freelance	n/a	15	8
Other Private	n/a	3	1
Local / central govt	n/a	1	5
Other Public	n/a	1	5

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	7.5	7.4
Pay:	n/a	4.1	4.2
Quality of life:	n/a	4.5	4.6
Business environment:	n/a	4.7	4.7

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	31	25
by clients	n/a	53	36

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	98.6	96.7
Another country	n/a	1.4	3.3
Per cent seriously considered working in another country	n/a	n/a	27

Earnings

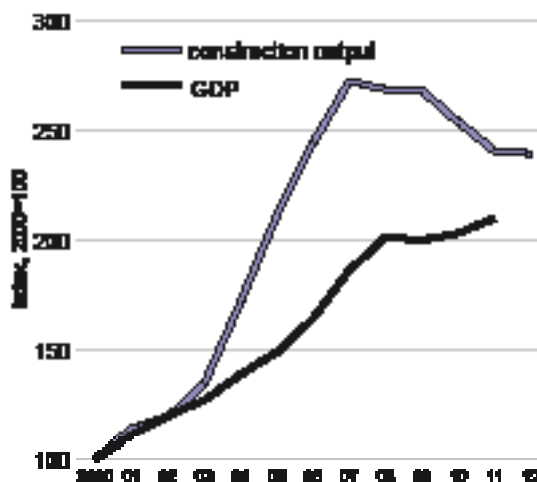
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	7,671	12,271
Partners / Directors	n/a	20,455	14,000
Private practice Salaried	n/a	6,204	4,908
Freelance	n/a	5,881	6,135
Other Private	n/a	n/a	4,602
Local / central govt	n/a	n/a	2,045
Other Public	n/a	n/a	2,211
ALL	n/a	7,671	6,135

* earnings values are unadjusted for PPP

Working Hours

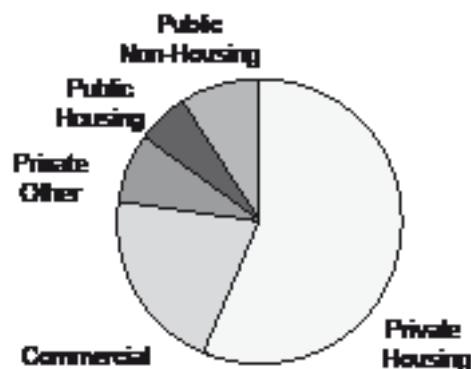
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	43.3	48.3
Partner / director	n/a	47.7	46.0
Private practice salaried	n/a	48.3	42.1
Freelance	n/a	38.6	52.8
Local / central govt	n/a	41.3	40.0

GDP & Construction Output



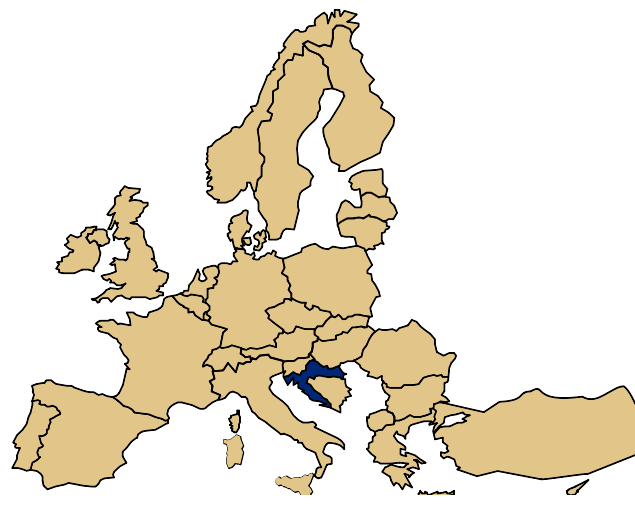
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	n/a	1,215	n/a
Number of participants	n/a	141	283
Response rate	n/a	12%	n/a
Accuracy of results at 95% confidence level	n/a	+/-8%	+/-5.5



Social & Economic

	2008	2010	2012*
Population	4,435,383	4,425,747	4,398,150
GDP, € millions	47,365	45,779	44,892
GDP per head	10,679	10,344	10,207
Construction output, € m	n/a	n/a	n/a
Construction as % GDP	n/a	n/a	n/a

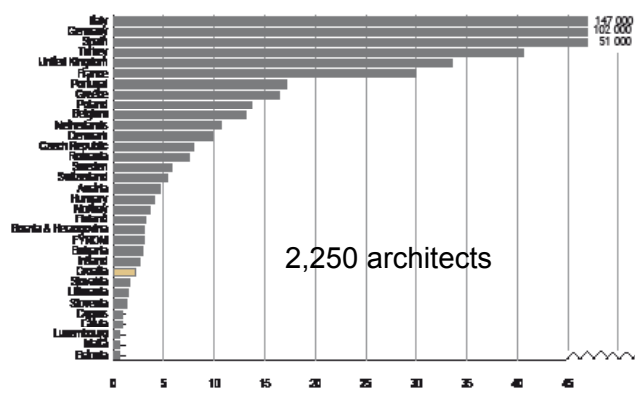
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	n/a	2,200	2,250
Number of architects per 1000 population	n/a	0.5	0.5
Number male architects	n/a	965	1,020
Number female archts	n/a	1,235	1,230
Number aged under 40	n/a	658	710

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



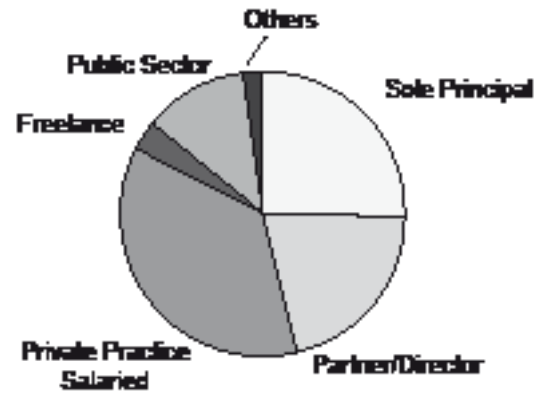
Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	64	50
Average revenue per:			
2 person practice	n/a	66,379	74,660
6 to 10 person practice	n/a	218,190	160,050

Private Practice

	2008	2010	2012
Number of practices	n/a	605	835
estimated number practices with -			
1 architectural staff	n/a	254	436
2-5 architectural staff	n/a	300	357
6-30 architectural staff	n/a	50	41
31+ architectural staff	n/a	2	0

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	24	25
Partners / Directors	n/a	19	21
Private practice Salaried	n/a	39	36
Private in-house	n/a	2	0
Freelance	n/a	5	3
Other Private	n/a	2	2
Local / central govt	n/a	4	4
Other Public	n/a	4	8

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	8.0	8.3
Pay:	n/a	4.8	5.3
Quality of life:	n/a	5.7	5.9
Business environment:	n/a	4.7	5.0

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	18	20
by clients	n/a	37	26

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	98.7	99.0
Another country	n/a	1.3	1.0
Per cent seriously considered working in another country	n/a	n/a	29

Earnings

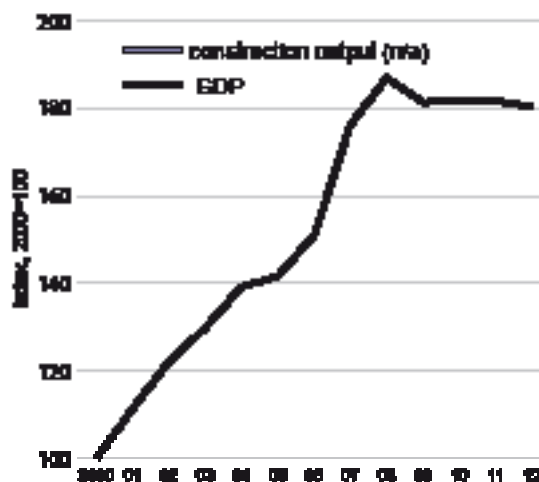
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	13,746	12,087
Partners / Directors	n/a	14,090	11,594
Private practice Salaried	n/a	16,152	14,675
Freelance	n/a	15,464	10,940
Other Private	n/a	15,121	16,010
Local / central govt	n/a	15,945	14,142
Other Public	n/a	15,670	19,212
ALL	n/a	14,433	13,341

* earnings values are unadjusted for PPP

Working Hours

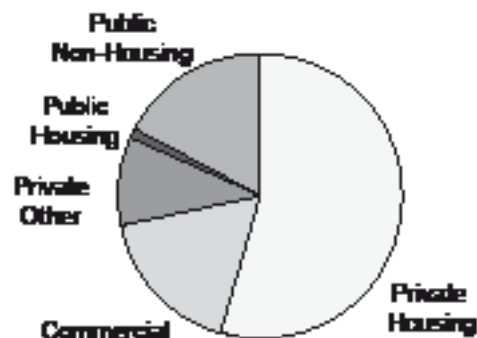
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	44.1	45.9
Partner / director	n/a	45.0	44.9
Private practice salaried	n/a	36.9	40.0
Freelance	n/a	40.0	44.4
Local / central govt	n/a	40.0	40.0

GDP & Construction Output



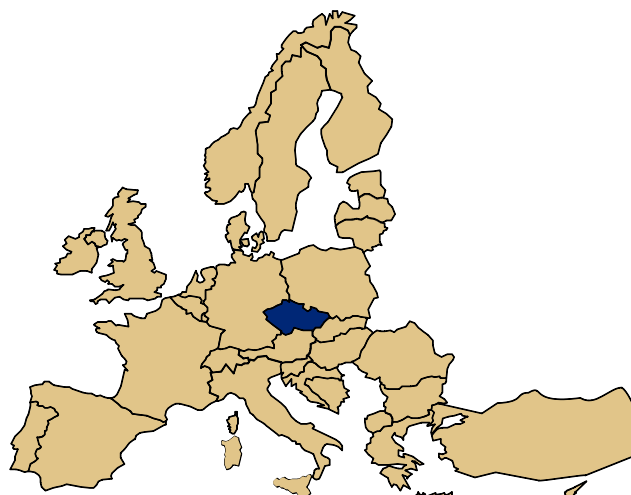
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	n/a	2,200	2,129
Number of participants	n/a	404	423
Response rate	n/a	18%	19.9
Accuracy of results at 95% confidence level	n/a	+/-4%	+/-4.3

[illegible]

A pie chart illustrating the distribution of respondents by employment status. The chart is divided into six segments of varying shades of gray, with the largest segment being white. The segments are labeled as follows: Sole Principal (white), Partner/Director (light gray), Private Practice Salaried (medium gray), Freelance (dark gray), Public Sector (very dark gray), and Others (black).

Employment Status	Approximate Percentage
Sole Principal	35%
Partner/Director	15%
Private Practice Salaried	25%
Freelance	15%
Public Sector	5%
Others	5%

	2008	2010	2012*
Population	10,381,130	10,506,813	10,504,203
GDP, € millions	147,879	145,955	154,913
GDP per head	14,245	13,891	14,748
Construction output, € m	34,510	28,987	27,124
Construction as % GDP	23	20	18

*Construction output is 2011 actual, GDP is forecast for 2012.

	2008	2010	2012*
Number of architects *	3,000	3,300	8,000*
Number of architects per 1000 population	0.3	0.3	0.8*
Number male architects	n/a	2,313	5,440*
Number female archts	n/a	987	2,560*
Number aged under 40	n/a	832	2,320*

* Estimate. The 2012 has been revised and is based on data from a different source compared with 2010 and 2008.

	€s		
	2008	2010	2012*
Estimated market (€m)	n/a	73	153*
Average revenue per:			
2 person practice	n/a	48,487	57,967
6 to 10 person practice	n/a	380,286	259,958

* The base data used to calculate market size has been revised for 2012 and is therefore not comparable with the 2010 estimate.

	2008	2010	2012*
Number of practices	n/a	756	2,031*
estimated number practices with -			
1 architectural staff	n/a	442	1,082*
2-5 architectural staff	n/a	257	797*
6-30 architectural staff	n/a	55	152*
31+ architectural staff	n/a	2	0

* The base data used to calculate number of practices has been revised for 2012 and is therefore not comparable with 2010.

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	32	30
Partners / Directors	n/a	9	8
Private practice Salaried	n/a	21	30
Private in-house	n/a	0	0
Freelance	n/a	31	27
Other Private	n/a	1	1
Local / central govt	n/a	4	3
Other Public	n/a	3	1

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	7.3	7.3
Pay:	n/a	4.7	4.8
Quality of life:	n/a	6.5	6.5
Business environment:	n/a	5.8	5.9

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	30	27
by clients	n/a	70	77

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	99.1	98.3
Another country	n/a	0.9	1.7
Per cent seriously considered working in another country	n/a	n/a	19

Earnings

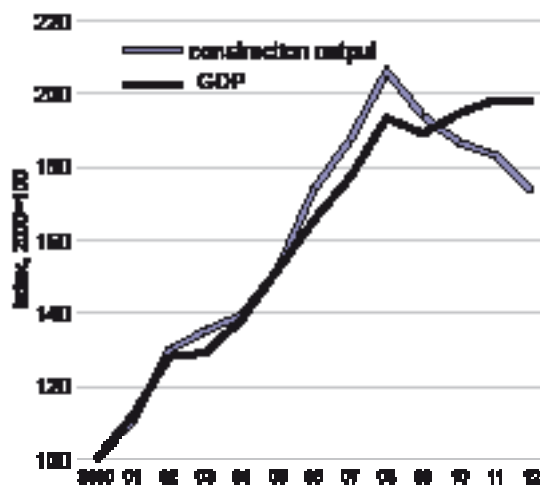
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	14,570	18,107
Partners / Directors	n/a	19,427	26,154
Private practice Salaried	n/a	15,271	14,485
Freelance	n/a	14,165	13,294
Other Private	n/a	n/a	12,011
Local / central govt	n/a	16,998	14,485
Other Public	n/a	14,570	14,888
ALL	n/a	15,015	14,888

* earnings values are unadjusted for PPP

Working Hours

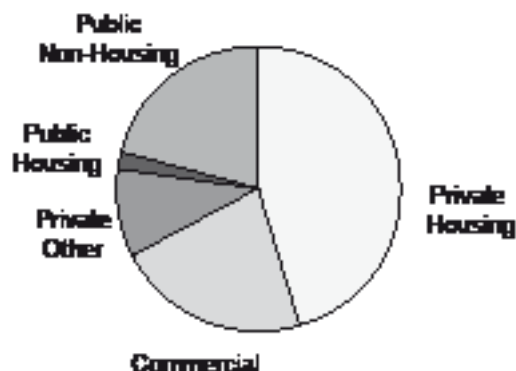
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	45.8	47.6
Partner / director	n/a	45.6	48.3
Private practice salaried	n/a	46.2	42.9
Freelance	n/a	40.4	47.9
Local / central govt	n/a	40.3	40.0

GDP & Construction Output



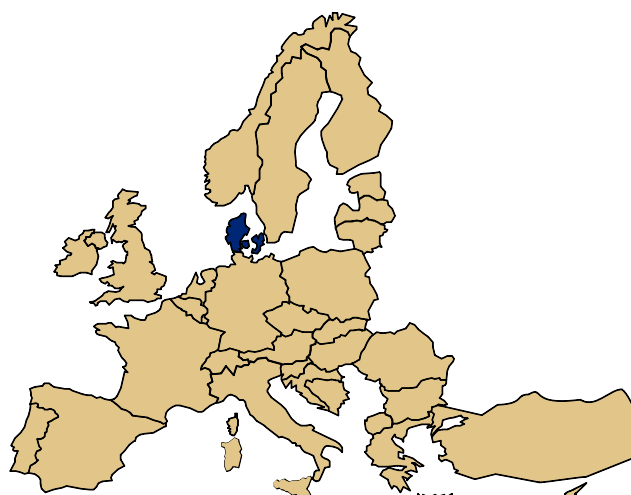
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

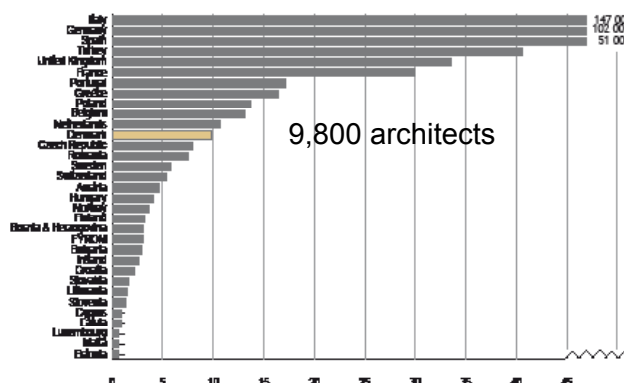


Response

	2008	2010	2012
Number contacted	n/a	2,434	3,000
Number of participants	n/a	488	446
Response rate	n/a	20%	14.9
Accuracy of results at 95% confidence level	n/a	+/-4%	+/-4.3



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	5,475,791	5,534,738	5,580,516
GDP, € millions	233,482	228,371	239,245
GDP per head	42,639	41,261	42,871
Construction output, € m	30,510	20,518	24,924
Construction as % GDP	13	9	10

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012*
Number of architects *	7,000	7,000	9,800*
Number of architects per 1000 population	1.3	1.3	1.8*
Number male architects	3,570	3,936	5,500*
Number female archts	3,430	3,064	4,300*
Number aged under 40	2,800	2,307	2,650*

* Estimate. The 2012 has been revised and is based on data from a different source compared with 2010 and 2008.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	356	309	448*
Average revenue per:			
2 person practice	291,700	129,768	160,624
6 to 10 person practice	566,330	1,138,352	771,921

* The base data used to calculate market size has been revised for 2012 and is therefore not comparable with the 2010 estimate.

Private Practice

	2008	2010	2012*
Number of practices	727	762	1,782*
estimated number practices with -			
1 architectural staff	393	384	1,106*
2-5 architectural staff	167	241	535*
6-30 architectural staff	121	123	129*
31+ architectural staff	46	14	12*

* The base data used to calculate number of practices has been revised for 2012 and is therefore not comparable with 2010.

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	11	12	12
Partners / Directors	7	16	13
Private practice Salaried	32	26	29
Private in-house	4	2	2
Freelance	2	3	1
Other Private	10	7	8
Local / central govt	24	23	25
Other Public	10	12	10

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	8.4	8.1	8.2
Pay:	6.8	6.5	6.8
Quality of life:	7.9	7.7	8.0
Business environment:	7.4	7.3	7.4

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	66	52	66
by clients	77	67	74

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	96.7	95.1	97.4
Another country	3.3	4.9	2.6
Per cent seriously considered working in another country	n/a	n/a	20

Earnings

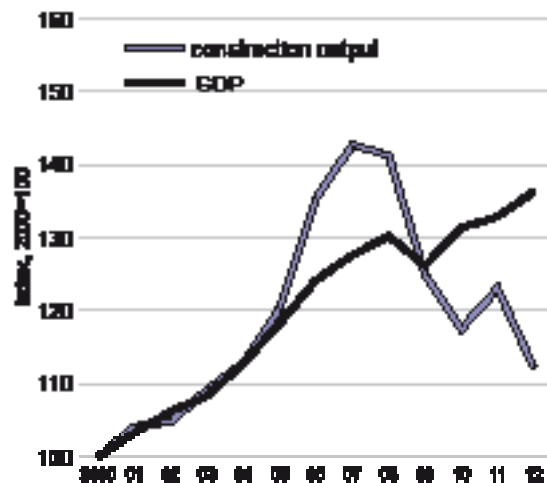
	average earnings €s *		
	2008	2010	2012
Sole Principals	67,150	60,449	62,513
Partners / Directors	53,720	67,165	69,907
Private practice Salaried	53,720	48,359	60,496
Freelance	n/a	19,478	30,961
Other Private	46,736	13,433	64,664
Local / central govt	53,720	54,538	53,774
Other Public	30,218	56,419	63,050
ALL	53,720	54,721	60,496

* earnings values are unadjusted for PPP

Working Hours

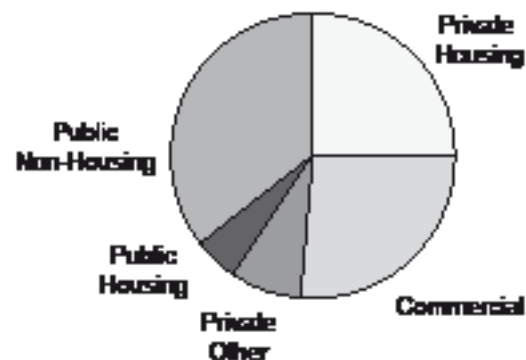
	average number hours worked per week		
	2008	2010	2012
Sole Principal	44.3	43.6	43.0
Partner / director	47.0	44.9	45.4
Private practice salaried	39.5	36.5	37.3
Freelance	40.0	36.9	39.8
Local / central govt	40.1	36.4	37.0

GDP & Construction Output



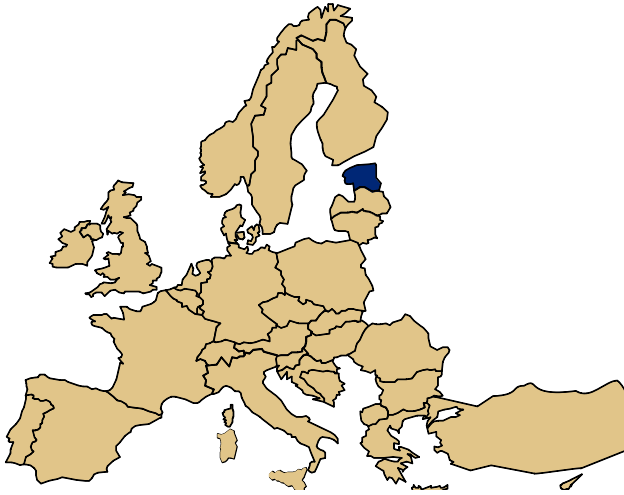
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

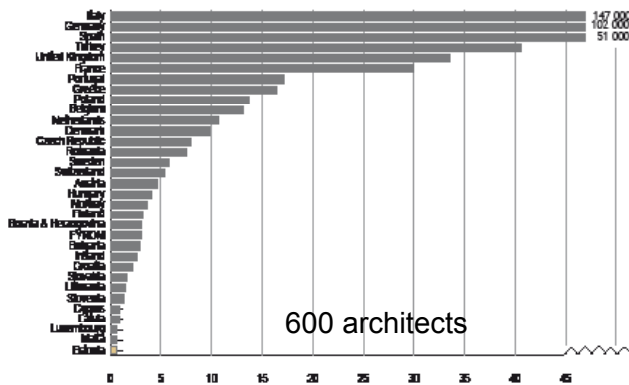


Response

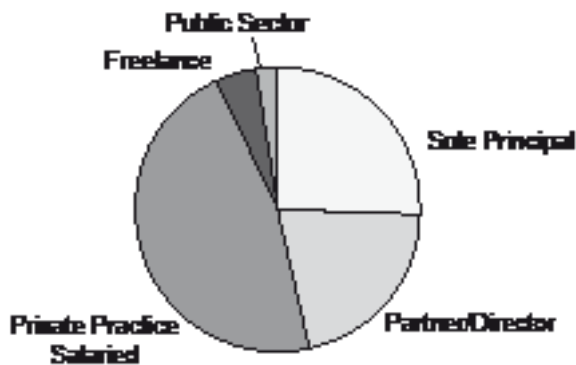
	2008	2010	2012
Number contacted	850	1,100	5,399
Number of participants	159	454	743
Response rate	19%	41%	13.8
Accuracy of results at 95% confidence level	+/-8%	+/-4%	+/-3.4



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	1,340,935	1,340,127	1,339,662
GDP, € millions	16,107	13,846	15,951
GDP per head	12,012	10,332	11,907
Construction output, € m	3,322	1,843	2,572
Construction as % GDP	21	13	16

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	700	600	600
Number of architects per 1000 population	0.5	0.4	0.4
Number male architects	588	400	410
Number female archts	112	200	190
Number aged under 40	252	169	70

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	28	13	29
Average revenue per:			
2 person practice	n/a	n/a	57,574
6 to 10 person practice	322,500	n/a	116,288

Private Practice

	2008	2010	2012
Number of practices	190	145	172
estimated number practices with -			
1 architectural staff	81	75	52
2-5 architectural staff	66	48	98
6-30 architectural staff	42	20	23
31+ architectural staff	1	0	1

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	16	28	26
Partners / Directors	56	9	21
Private practice Salaried	20	41	47
Private in-house	0	0	0
Freelance	4	6	5
Other Private	4	3	0
Local / central govt	0	9	2
Other Public	0	3	0

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	8.3	8.1	8.3
Pay:	6.0	4.2	4.7
Quality of life:	6.6	5.8	5.8
Business environment:	6.7	7.0	6.9

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	12	33	29
by clients	60	45	53

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	100	100	100
Another country	0	0	0
Per cent seriously considered working in another country	n/a	n/a	16

Earnings

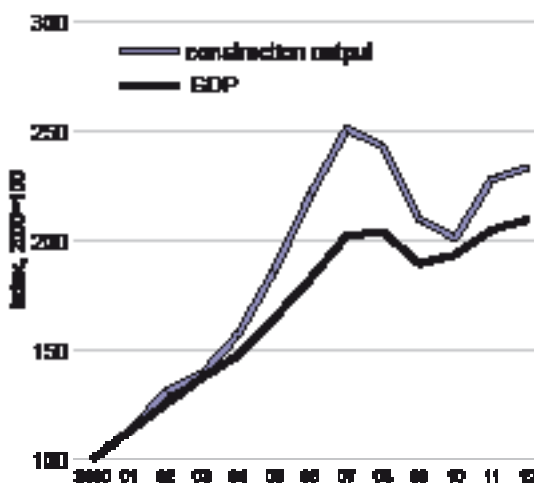
	average earnings €s *		
	2008	2010	2012
Sole Principals	41,280	n/a	7,200
Partners / Directors	25,800	n/a	20,000
Private practice Salaried	n/a	11,504	13,500
Freelance	n/a	n/a	10,000
Other Private	n/a	15,786	n/a
Local / central govt	n/a	n/a	n/a
Other Public	n/a	n/a	n/a
ALL	25,800	11,504	10,080

* earnings values are unadjusted for PPP

Working Hours

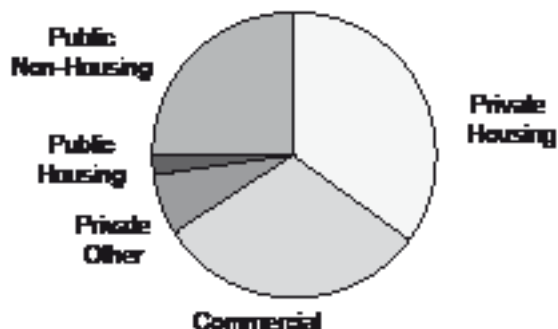
	average number hours worked per week		
	2008	2010	2012
Sole Principal	56.0	42.5	44.3
Partner / director	45.3	30.7	42.6
Private practice salaried	43.8	40.3	39.8
Freelance	n/a	41.7	42.5
Local / central govt	n/a	40.0	n/a

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

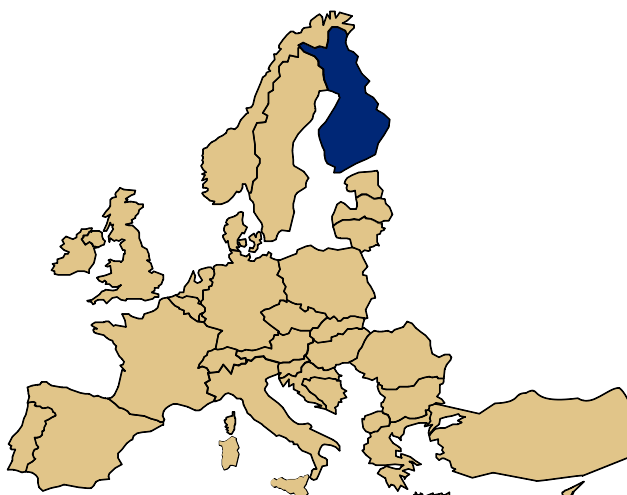


Response

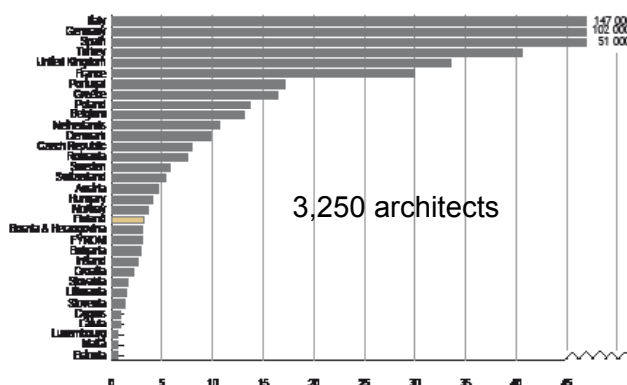
	2008	2010	2012
Number contacted	70	630	154
Number of participants	25	33	51
Response rate	36%	5%	33.1
Accuracy of results at 95% confidence level	+/-19%	+/-17%	+/-13.1



Finland



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	5,300,484	5,351,427	5,401,267
GDP, € millions	184,649	176,132	189,368
GDP per head	34,836	32,913	35,060
Construction output, € m	32,229	32,298	33,922
Construction as % GDP	17	18	18

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	3,600	3,050	3,250
Number of architects per 1000 population	0.7	0.6	0.6
Number male architects	1,800	1,705	1,760
Number female archts	1,800	1,345	1,490
Number aged under 40	1,152	779	890

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	43	117	162
Average revenue per:			
2 person practice	70,000	164,423	131,209
6 to 10 person practice	350,000	501,783	629,257

Private Practice

	2008	2010	2012
Number of practices	355	363	661
estimated number practices with -			
1 architectural staff	140	159	379
2-5 architectural staff	100	133	213
6-30 architectural staff	106	69	68
31+ architectural staff	9	3	0

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	12	15	13
Partners / Directors	12	14	11
Private practice Salaried	31	29	40
Private in-house	1	1	1
Freelance	2	2	0
Other Private	8	3	3
Local / central govt	25	26	21
Other Public	8	11	11

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	8.0	8.0	8.1
Pay:	6.0	5.8	6.3
Quality of life:	7.5	7.6	7.6
Business environment:	7.0	6.8	7.0

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	43	40	43
by clients	70	70	58

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	100	95.4	97.3
Another country	0	4.6	2.7
Per cent seriously considered working in another country	n/a	n/a	15

Earnings

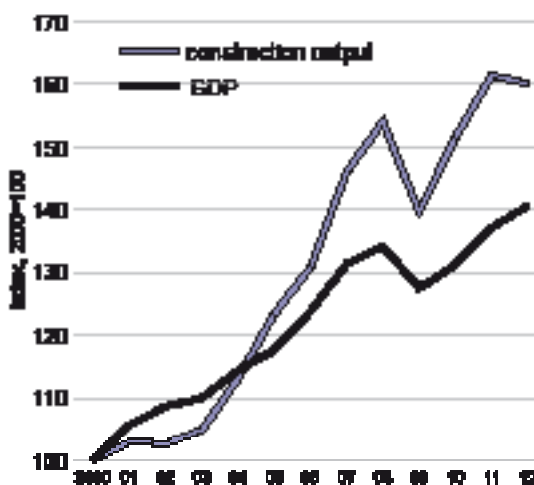
	average earnings €s *		
	2008	2010	2012
Sole Principals	35,000	45,000	50,000
Partners / Directors	49,250	52,000	70,000
Private practice Salaried	36,000	42,500	42,500
Freelance	n/a	25,000	n/a
Other Private	36,500	44,000	36,600
Local / central govt	45,000	47,000	49,000
Other Public	42,500	46,250	52,000
ALL	39,600	45,000	48,000

* earnings values are unadjusted for PPP

Working Hours

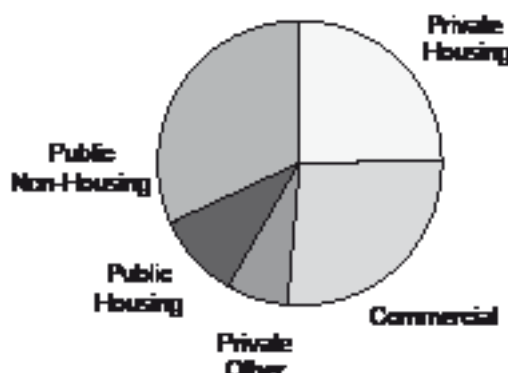
	average number hours worked per week		
	2008	2010	2012
Sole Principal	44.9	43.1	45.3
Partner / director	43.3	42.7	43.9
Private practice salaried	37.9	40.3	37.9
Freelance	38.8	37.1	n/a
Local / central govt	39.0	36.2	36.8

GDP & Construction Output



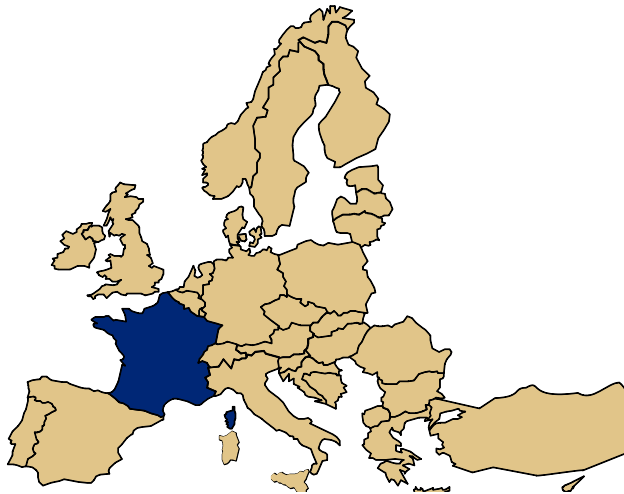
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

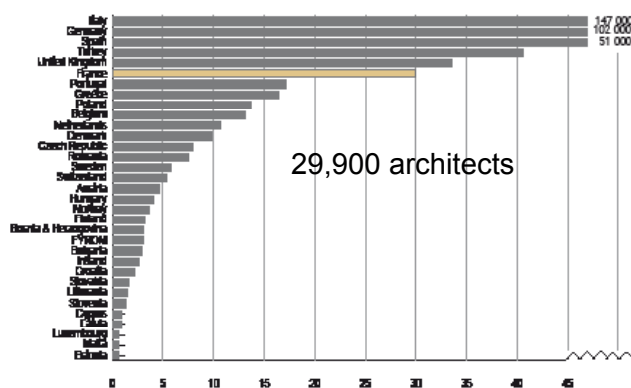


Response

	2008	2010	2012
Number contacted	344	1,637	2,286
Number of participants	203	560	384
Response rate	59%	34%	16.8
Accuracy of results at 95% confidence level	+/-7%	+/-4%	+/-4.7



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	63,753,140	64,713,762	65,397,912
GDP, € millions	1,948,511	1,946,564	1,996,583
GDP per head	30,563	30,080	30,530
Construction output, € m	262,849	245,485	241,930
Construction as % GDP	13	13	12

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	29,400	29,700	29,900
Number of architects per 1000 population	0.5	0.5	0.5
Number male architects	12,936	21,641	20,160
Number female archtsts	16,464	8,059	9,740
Number aged under 40	13,818	8,429	9,290

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	1,104	1,302	1,254
Average revenue per:			
2 person practice	138,158	196,787	169,294
6 to 10 person practice	698,573	774,945	883,467

Private Practice

	2008	2010	2012
Number of practices	8,157	7,891	7,968
estimated number practices with -			
1 architectural staff	4,900	5,386	5,323
2-5 architectural staff	2,833	2,175	2,338
6-30 architectural staff	417	328	303
31+ architectural staff	7	3	4

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	23	28	26
Partners / Directors	5	5	5
Private practice Salaried	18	16	17
Private in-house	1	0	0
Freelance	25	21	20
Other Private	24	23	26
Local / central govt	2	2	3
Other Public	4	4	4

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.4	7.3	7.3
Pay:	4.5	4.4	4.8
Quality of life:	6.1	5.8	5.6
Business environment:	6.3	6.1	6.1

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	20	27	21
by clients	62	64	55

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	91.7	97.7	97.9
Another country	8.3	2.3	2.1
Per cent seriously considered working in another country	n/a	n/a	13

Earnings

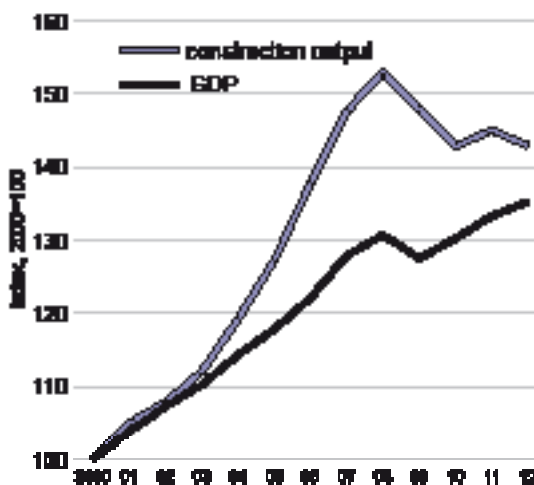
	average earnings €s *		
	2008	2010	2012
Sole Principals	29,000	30,000	30,000
Partners / Directors	42,000	33,000	42,000
Private practice Salaried	46,800	39,000	38,000
Freelance	35,000	28,000	25,000
Other Private	37,200	32,250	32,500
Local / central govt	n/a	41,400	37,200
Other Public	n/a	36,600	47,714
ALL	36,000	33,000	30,250

* earnings values are unadjusted for PPP

Working Hours

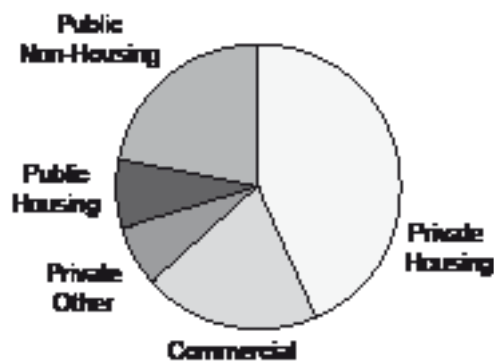
	average number hours worked per week		
	2008	2010	2012
Sole Principal	49.0	46.7	50.4
Partner / director	51.4	44.3	48.5
Private practice salaried	48.3	47.5	46.4
Freelance	48.5	36.7	48.6
Local / central govt	37.0	37.5	37.9

GDP & Construction Output



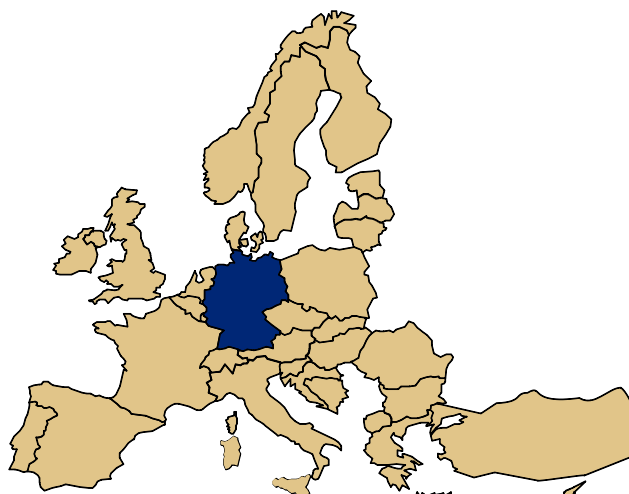
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

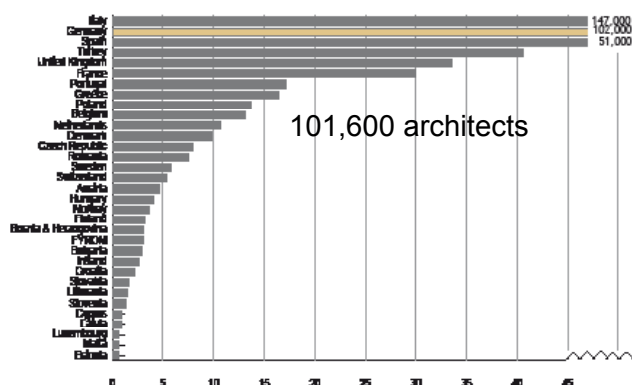


Response

	2008	2010	2012
Number contacted	1,500	21,781	18,216
Number of participants	142	1,202	957
Response rate	9%	6%	5.3
Accuracy of results at 95% confidence level	+/-8%	+/-2%	+/- 3.1



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	82,221,808	81,802,257	81,843,743
GDP, € millions	2,481,200	2,432,382	2,592,600
GDP per head	30,177	29,735	31,677
Construction output, € m	217,350	225,973	247,633
Construction as % GDP	9	9	10

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	95,000	100,500	101,600
Number of architects per 1000 population	1.2	1.2	1.2
Number male architects	67,450	79,001	65,070
Number female archts	27,550	21,499	36,530
Number aged under 40	29,450	14,023	35,520

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	3,988	4,095	4,193
Average revenue per:			
2 person practice	88,458	86,449	94,088
6 to 10 person practice	406,027	633,444	440,416

Private Practice

	2008	2010	2012
Number of practices	32,311	35,021	37,026
estimated number practices with -			
1 architectural staff	18,970	22,793	21,813
2-5 architectural staff	10,753	10,305	13,637
6-30 architectural staff	2,460	1,843	1,523
31+ architectural staff	128	80	54

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	40	62	32
Partners / Directors	14	10	14
Private practice Salaried	20	14	26
Private in-house	5	3	7
Freelance	3	3	4
Other Private	7	2	6
Local / central govt	7	2	8
Other Public	4	2	4

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.4	7.5	7.5
Pay:	4.1	4.0	4.7
Quality of life:	5.5	5.6	6.0
Business environment:	6.1	5.7	6.6

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	38	40	46
by clients	57	60	52

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	92.1	99.7	96.6
Another country	7.9	0.3	3.4
Per cent seriously considered working in another country	n/a	n/a	21

Earnings

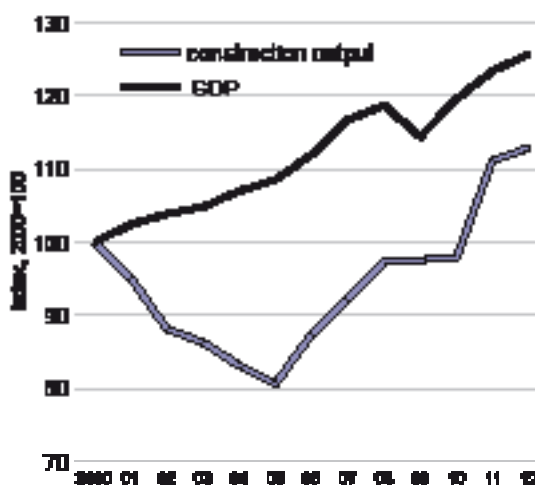
	average earnings €s *		
	2008	2010	2012
Sole Principals	40,000	43,500	50,000
Partners / Directors	46,300	50,000	60,000
Private practice Salaried	36,000	34,290	37,200
Freelance	35,000	25,000	40,000
Other Private	48,000	50,000	54,500
Local / central govt	45,000	42,976	50,000
Other Public	50,500	48,100	50,000
ALL	40,000	42,488	48,000

* earnings values are unadjusted for PPP

Working Hours

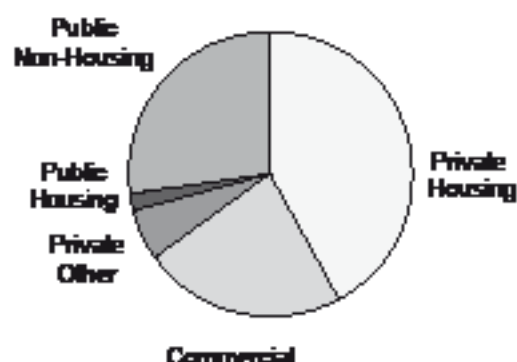
	average number hours worked per week		
	2008	2010	2012
Sole Principal	51.5	49.2	50.6
Partner / director	51.8	47.1	50.1
Private practice salaried	46.1	36.7	40.3
Freelance	46.9	39.9	47.5
Local / central govt	43.0	39.3	40.1

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

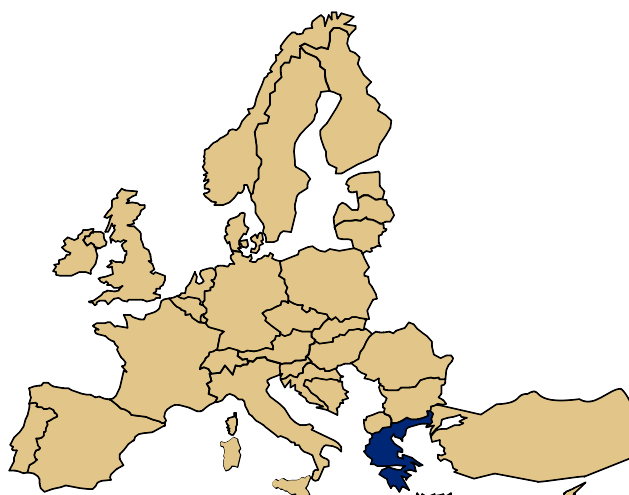


Response

	2008	2010	2012
Number contacted	12,000	7,300	n/a
Number of participants	3,460	393	840
Response rate	29%	5%	n/a
Accuracy of results at 95% confidence level	+/-2%	+/-5%	+/- 3.4



Greece



Social & Economic

	2008	2010	2012*
Population	11,214,992	11,295,002	11,290,785
GDP, € millions	235,679	232,767	215,088
GDP per head	21,015	20,608	19,050
Construction output, € m	26,689	19,573	12,110
Construction as % GDP	11	8	6

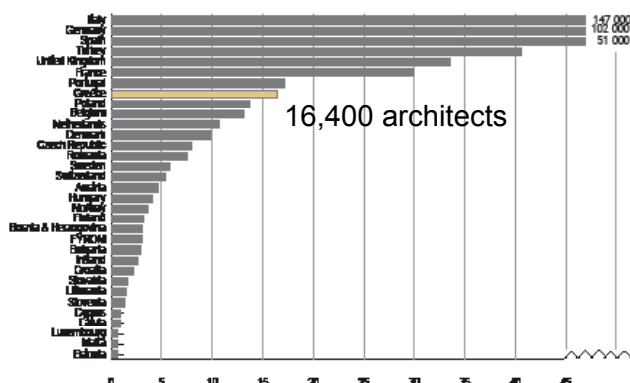
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	15,000	15,800	16,400
Number of architects per 1000 population	1.3	1.4	1.5
Number male architects	7,200	6,830	6,800
Number female archts	7,800	8,970	9,600
Number aged under 40	7,950	8,283	9,250

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



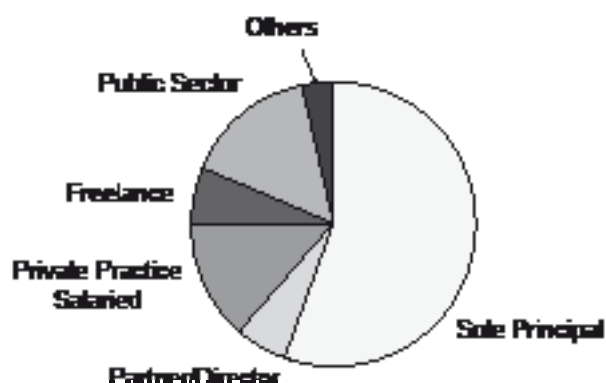
Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	294	289	171
Average revenue per:			
2 person practice	33,612	50,720	33,861
6 to 10 person practice	284,625	190,067	71,500

Private Practice

	2008	2010	2012
Number of practices	3,821	3,818	5,219
estimated number practices with -			
1 architectural staff	1,563	1,985	2,892
2-5 architectural staff	1,831	1,603	2,180
6-30 architectural staff	344	220	147
31+ architectural staff	83	10	0

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	14	49	56
Partners / Directors	15	5	6
Private practice Salaried	19	17	14
Private in-house	1	0	0
Freelance	23	9	6
Other Private	7	3	3
Local / central govt	8	10	7
Other Public	14	7	8

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.9	7.2	7.3
Pay:	5.1	4.3	4.0
Quality of life:	6.0	5.5	5.1
Business environment:	6.4	6.1	6.0

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	39	32	23
by clients	50	54	42

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	94	96.5	98.7
Another country	6	3.5	1.3
Per cent seriously considered working in another country	n/a	n/a	57

Earnings

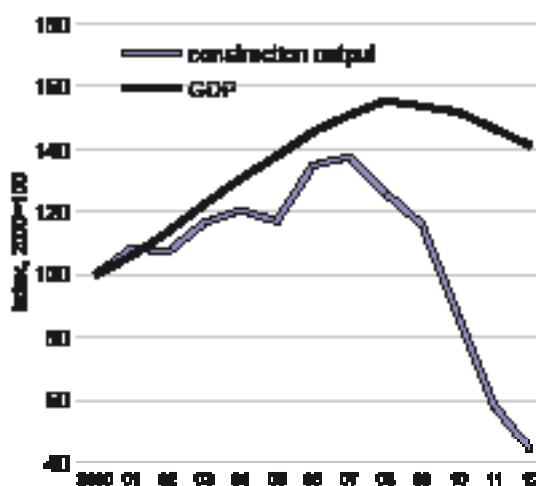
	average earnings €s *		
	2008	2010	2012
Sole Principals	30,000	30,000	20,000
Partners / Directors	30,000	42,500	22,500
Private practice Salaried	18,000	14,700	13,200
Freelance	20,000	13,100	10,000
Other Private	22,500	n/a	13,200
Local / central govt	21,500	20,000	19,000
Other Public	30,083	20,000	20,000
ALL	24,000	20,000	18,000

* earnings values are unadjusted for PPP

Working Hours

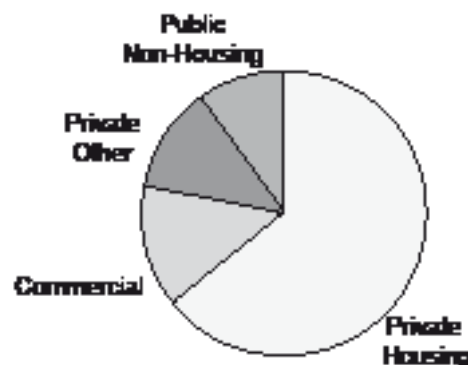
	average number hours worked per week		
	2008	2010	2012
Sole Principal	54.2	42.1	47.6
Partner / director	50.3	51.4	45.6
Private practice salaried	44.0	39.1	41.8
Freelance	48.2	41.2	45.2
Local / central govt	44.9	37.0	40.0

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	1,700	2,567	3,838
Number of participants	394	314	490
Response rate	23%	12%	12.8
Accuracy of results at 95% confidence level	+/-5%	+/-6%	+/- 4.4

Country	Number of Architects
Italy	147,000
Germany	102,000
Spain	51,000
Turkey	-
United Kingdom	-
Austria	-
France	-
Portugal	-
Greece	-
Poland	-
Belgium	-
Netherlands	-
Denmark	-
Czech Republic	-
Finland	-
Sweden	-
Slovenia	-
Austria	-
Hungary	-
Norway	-
Israel	-
Russia & Kazakhstan	-
Egypt	-
Bulgaria	-
Ireland	-
Croatia	-
Slovakia	-
Lithuania	-
Slovenia	-
Cyprus	-
Malta	-
Luxembourg	-
Latvia	-
Estonia	-

	2008	2010	2012*
Population	10,045,401	10,013,000	9,962,000
GDP, € millions	105,545	97,095	100,513
GDP per head	10,507	9,697	10,090
Construction output, € m	10,625	8,131	7,496
Construction as % GDP	10	8	7

Architectural Profession

	2008	2010	2012
Number of architects *	4,000	4,000	4,000
Number of architects per 1000 population	0.4	0.4	0.4
Number male architects	n/a	n/a	2,680
Number female archts	n/a	n/a	1,320
Number aged under 40	n/a	n/a	1,070

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	n/a	61
Average revenue per:	n/a	n/a	
2 person practice	n/a	n/a	17,311
6 to 10 person practice	n/a	n/a	146,850

	2008	2010	2012
Number of practices	n/a	n/a	699
estimated number practices with -			
1 architectural staff	n/a	n/a	262
2-5 architectural staff	n/a	n/a	378
6-30 architectural staff	n/a	n/a	59
31+ architectural staff	n/a	n/a	0

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	n/a	25
Partners / Directors	n/a	n/a	9
Private practice Salaried	n/a	n/a	27
Private in-house	n/a	n/a	5
Freelance	n/a	n/a	8
Other Private	n/a	n/a	3
Local / central govt	n/a	n/a	12
Other Public	n/a	n/a	11

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	n/a	7.7
Pay:	n/a	n/a	3.9
Quality of life:	n/a	n/a	4.6
Business environment:	n/a	n/a	4.1

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	n/a	16
by clients	n/a	n/a	37

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	n/a	98.3
Another country	n/a	n/a	1.7
Per cent seriously considered working in another country	n/a	n/a	38

Earnings

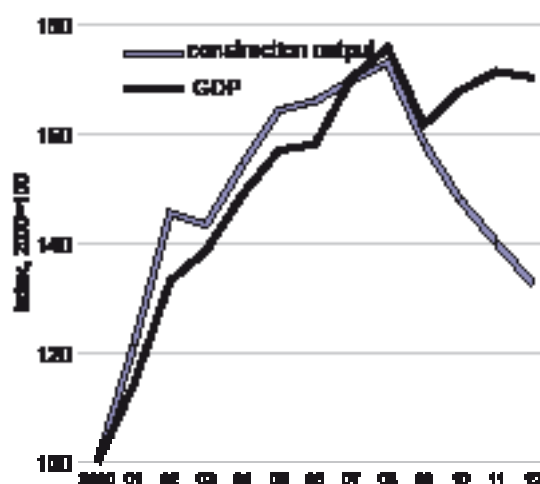
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	n/a	8,021
Partners / Directors	n/a	n/a	7,528
Private practice Salaried	n/a	n/a	7,810
Freelance	n/a	n/a	6,332
Other Private	n/a	n/a	14,072
Local / central govt	n/a	n/a	12,664
Other Public	n/a	n/a	10,554
ALL	n/a	n/a	8,795

* earnings values are unadjusted for PPP

Working Hours

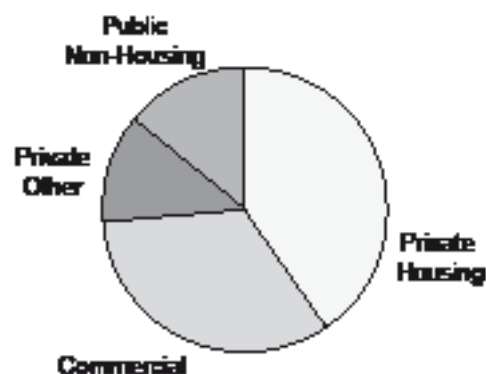
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	n/a	45.6
Partner / director	n/a	n/a	42.2
Private practice salaried	n/a	n/a	41.5
Freelance	n/a	n/a	40.9
Local / central govt	n/a	n/a	39.6

GDP & Construction Output



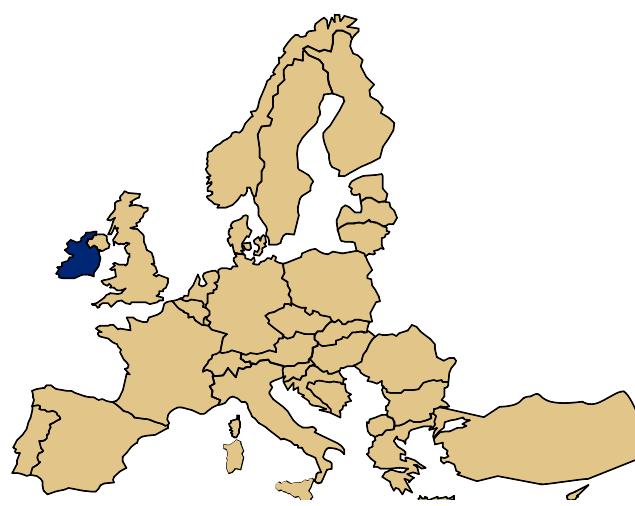
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	n/a	n/a	n/a
Number of participants	n/a	n/a	191
Response rate	n/a	n/a	n/a
Accuracy of results at 95% confidence level	n/a	n/a	+/- 6.9



Social & Economic

	2008	2010	2012*
Population	4,419,859	4,455,780	4,495,351
GDP, € millions	179,989	155,491	156,438
GDP per head	40,723	34,896	34,800
Construction output, € m	30,889	14,250	11,662
Construction as % GDP	17	9	7

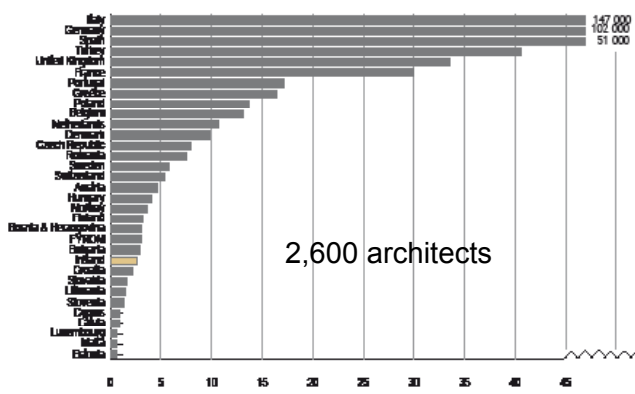
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	3,500	2,600	2,600
Number of architects per 1000 population	0.8	0.6	0.6
Number male architects	2,695	1,811	1,790
Number female archts	805	789	810
Number aged under 40	1,960	1,088	960

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	409	172	112
Average revenue per:			
2 person practice	146,294	116,390	101,324
6 to 10 person practice	498,453	718,106	501,000

Private Practice

	2008	2010	2012
Number of practices	694	824	1,027
estimated number practices with -			
1 architectural staff	196	448	686
2-5 architectural staff	332	319	302
6-30 architectural staff	148	55	38
31+ architectural staff	18	2	1

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	16	26	26
Partners / Directors	23	28	26
Private practice Salaried	40	26	26
Private in-house	1	1	0
Freelance	2	3	2
Other Private	4	2	4
Local / central govt	8	9	9
Other Public	4	6	6

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.9	7.2	6.7
Pay:	5.8	4.1	3.9
Quality of life:	6.7	5.7	5.6
Business environment:	6.3	5.4	5.3

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	30	18	13
by clients	59	54	51

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	81.8	90.5	87.3
Another country	18.2	9.5	12.7
Per cent seriously considered working in another country	n/a	n/a	37

Earnings

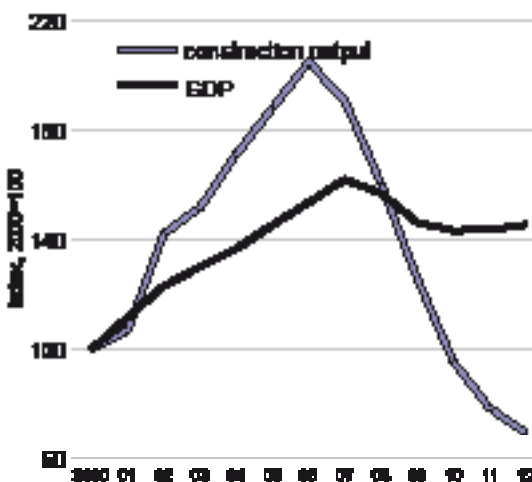
	average earnings €s *		
	2008	2010	2012
Sole Principals	75,000	40,000	25,000
Partners / Directors	80,000	55,000	45,000
Private practice Salaried	60,000	45,000	42,000
Freelance	n/a	23,500	31,000
Other Private	72,500	66,500	55,194
Local / central govt	70,000	72,000	76,000
Other Public	60,000	74,000	71,000
ALL	65,000	50,250	43,000

* earnings values are unadjusted for PPP

Working Hours

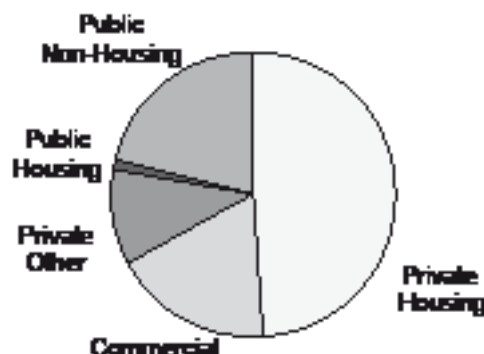
	average number hours worked per week		
	2008	2010	2012
Sole Principal	44.6	41.4	43.0
Partner / director	50.3	44.6	44.8
Private practice salaried	41.9	37.8	38.6
Freelance	40.0	38.0	38.8
Local / central govt	40.6	36.1	36.0

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

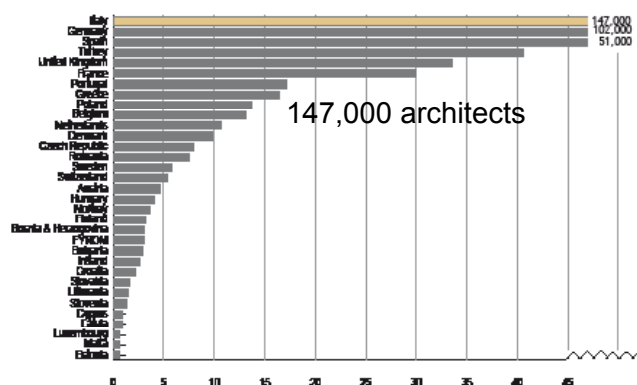


Response

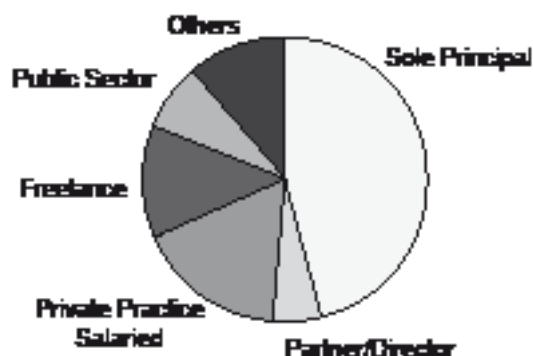
	2008	2010	2012
Number contacted	410	2,243	2,300
Number of participants	147	547	361
Response rate	36%	24%	15.7
Accuracy of results at 95% confidence level	+/-8%	+/-4%	+/- 4.8



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	59,618,114	60,340,328	60,850,782
GDP, € millions	1,567,851	1,553,350	1,580,220
GDP per head	26,298	25,743	25,969
Construction output, € m	204,401	185,616	180,233
Construction as % GDP	13	12	11

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	n/a	145,000	147,000
Number of architects per 1000 population	n/a	2.4	2.4
Number male architects	n/a	102,190	92,300
Number female archts	n/a	42,810	54,700
Number aged under 40	n/a	84,238	49,900

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	2,709	2,775
Average revenue per:			
2 person practice	n/a	52,108	60,380
6 to 10 person practice	n/a	470,573	253,669

Private Practice

	2008	2010	2012
Number of practices	n/a	53,081	58,397
estimated number practices with -			
1 architectural staff	n/a	39,352	44,484
2-5 architectural staff	n/a	11,994	13,158
6-30 architectural staff	n/a	1,685	752
31+ architectural staff	n/a	50	3

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	39	46
Partners / Directors	n/a	10	6
Private practice Salaried	n/a	20	17
Private in-house	n/a	1	2
Freelance	n/a	16	13
Other Private	n/a	9	9
Local / central govt	n/a	3	4
Other Public	n/a	2	4

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	6.6	6.5
Pay:	n/a	3.1	3.9
Quality of life:	n/a	4.8	5.2
Business environment:	n/a	4.9	5.2

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	22	30

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	94.2	99.3
Another country	n/a	5.8	0.7
Per cent seriously considered working in another country	n/a	n/a	40

Earnings

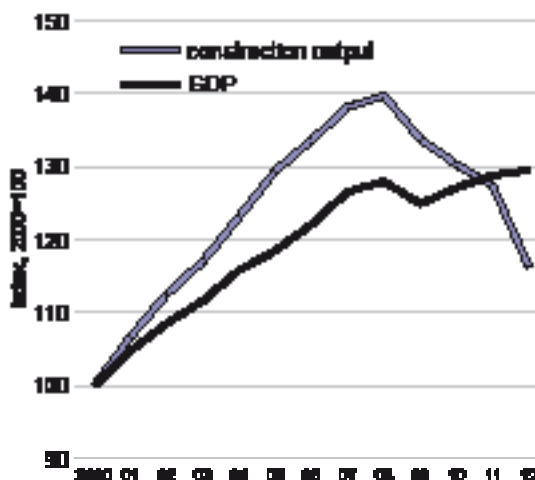
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	20,000	27,000
Partners / Directors	n/a	27,900	34,500
Private practice Salaried	n/a	15,750	24,000
Freelance	n/a	15,000	20,000
Other Private	n/a	22,000	25,000
Local / central govt	n/a	30,000	30,000
Other Public	n/a	n/a	28,000
ALL	n/a	20,000	25,000

* earnings values are unadjusted for PPP

Working Hours

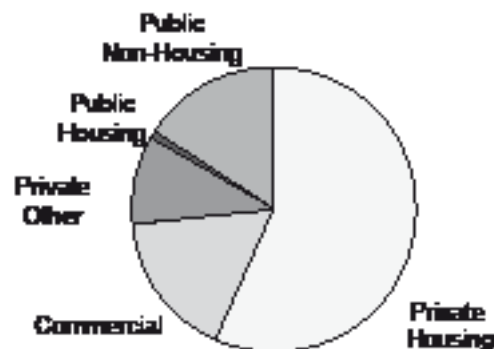
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	40.8	43.0
Partner / director	n/a	43.3	44.1
Private practice salaried	n/a	45.0	41.8
Freelance	n/a	40.2	40.8
Local / central govt	n/a	36.0	36.4

GDP & Construction Output



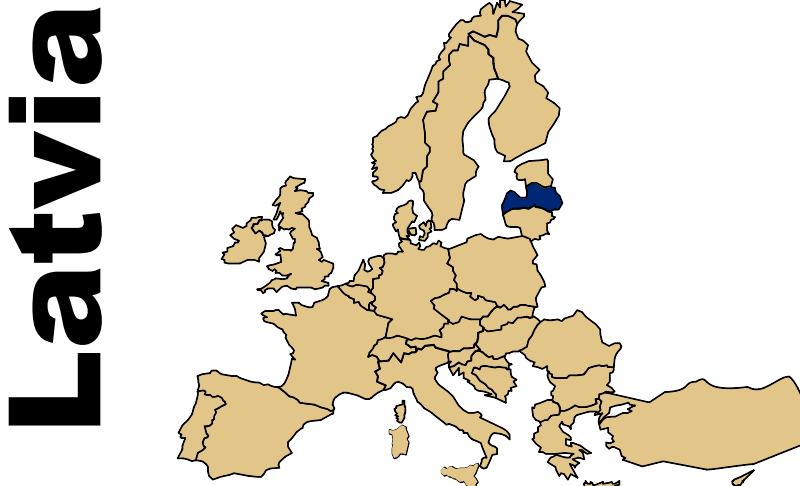
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

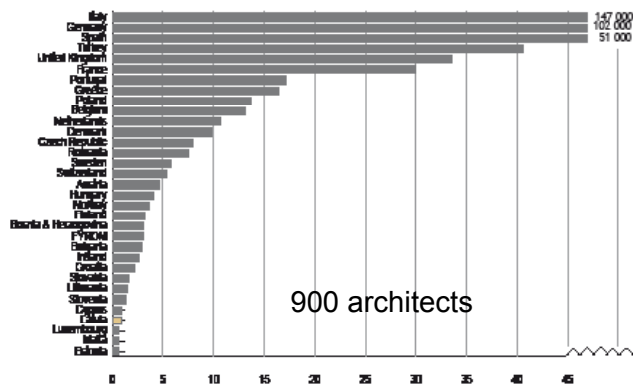


Response

	2008	2010	2012
Number contacted	n/a	n/a	64,230
Number of participants	n/a	124	14,004
Response rate	n/a	n/a	21.8
Accuracy of results at 95% confidence level	n/a	+/-9%	+/- 0.8



Number of Architects 2012



Architects' Field of Employment

data not available

Social & Economic

	2008	2010	2012*
Population	2,270,894	2,248,374	2,042,371
GDP, € millions	23,037	16,693	21,338
GDP per head	10,145	7,425	10,447
Construction output, € m	7,241	3,737	3,705
Construction as % GDP	31	22	17

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	700	900	900
Number of architects per 1000 population	0.3	0.4	0.4
Number male architects	n/a	225	n/a
Number female archts	n/a	675	n/a
Number aged under 40	n/a	225	n/a

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	n/a	n/a
Average revenue per:			
2 person practice	n/a	n/a	n/a
6 to 10 person practice	n/a	n/a	n/a

Private Practice

	2008	2010	2012
Number of practices	n/a	n/a	n/a
estimated number practices with -	n/a	n/a	n/a
1 architectural staff	n/a	n/a	n/a
2-5 architectural staff	n/a	n/a	n/a
6-30 architectural staff	n/a	n/a	n/a
31+ architectural staff	n/a	n/a	n/a

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	n/a	n/a
Partners / Directors	n/a	n/a	n/a
Private practice Salaried	n/a	n/a	n/a
Private in-house	n/a	n/a	n/a
Freelance	n/a	n/a	n/a
Other Private	n/a	n/a	n/a
Local / central govt	n/a	n/a	n/a
Other Public	n/a	n/a	n/a

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	7.3	n/a
Pay:	n/a	2.3	n/a
Quality of life:	n/a	5.5	n/a
Business environment:	n/a	5.3	n/a

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	0	n/a
by clients	n/a	50	n/a

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	n/a	n/a
Another country	n/a	n/a	n/a
Per cent seriously considered working in another country	n/a	n/a	n/a

Earnings

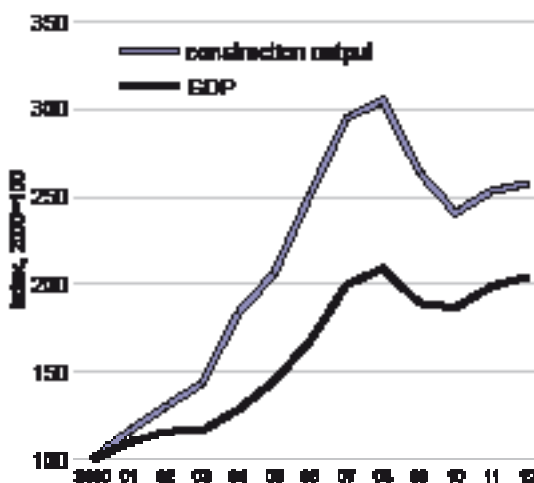
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	n/a	n/a
Partners / Directors	n/a	n/a	n/a
Private practice Salaried	n/a	n/a	n/a
Freelance	n/a	n/a	n/a
Other Private	n/a	n/a	n/a
Local / central govt	n/a	n/a	n/a
Other Public	n/a	n/a	n/a
ALL	n/a	n/a	n/a

* earnings values are unadjusted for PPP

Working Hours

	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	n/a	n/a
Partner / director	n/a	n/a	n/a
Private practice salaried	n/a	n/a	n/a
Freelance	n/a	n/a	n/a
Local / central govt	n/a	n/a	n/a

GDP & Construction Output



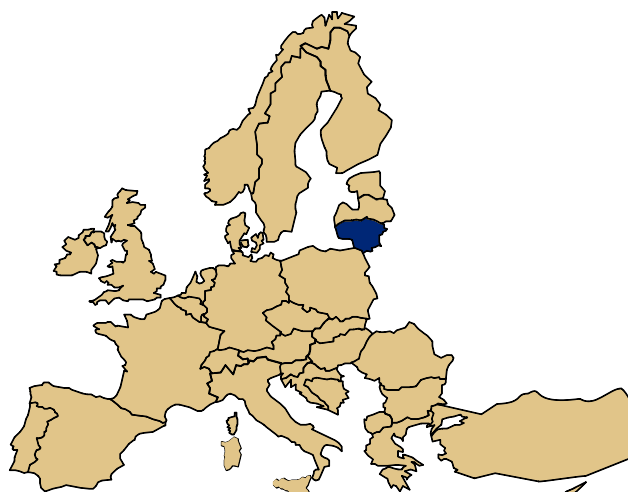
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads

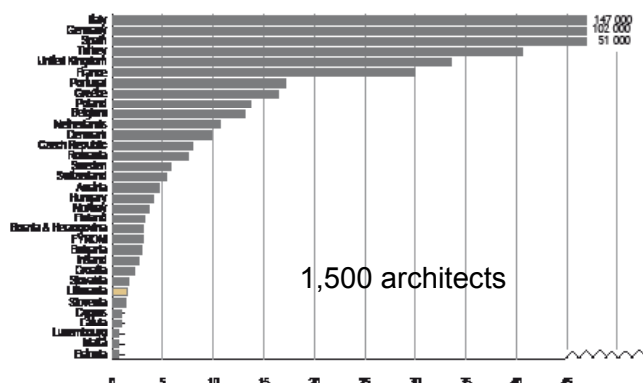
data not available

Response

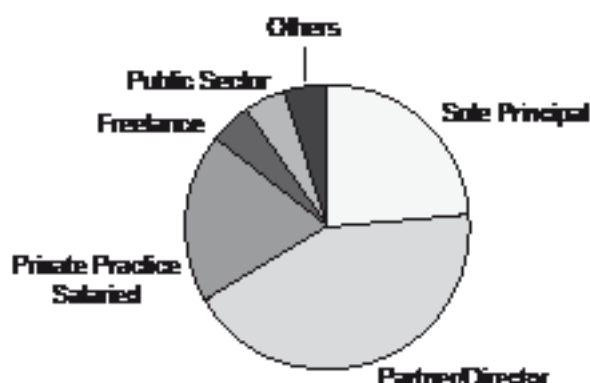
	2008	2010	2012
Number contacted	n/a	141	n/a
Number of participants	n/a	5	n/a
Response rate	n/a	4%	n/a
Accuracy of results at 95% confidence level	n/a	+/-44%	n/a



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	3,366,357	3,329,039	3,199,771
GDP, € millions	32,288	25,820	30,705
GDP per head	9,591	7,756	9,596
Construction output, € m	5,904	3,203	3,378
Construction as % GDP	18	12	11

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	n/a	1,500	1,500
Number of architects per 1000 population	n/a	0.5	0.5
Number male architects	n/a	1,020	1,300
Number female archts	n/a	480	200
Number aged under 40	n/a	540	550

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	11	10
Average revenue per:			
2 person practice	n/a	29,148	n/a
6 to 10 person practice	n/a	82,324	n/a

Private Practice

	2008	2010	2012
Number of practices	n/a	282	422
estimated number practices with -			
1 architectural staff	n/a	103	182
2-5 architectural staff	n/a	105	168
6-30 architectural staff	n/a	75	73
31+ architectural staff	n/a	0	0

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	28	24
Partners / Directors	n/a	28	43
Private practice Salaried	n/a	20	19
Private in-house	n/a	4	0
Freelance	n/a	8	5
Other Private	n/a	8	5
Local / central govt	n/a	4	5
Other Public	n/a	0	0

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	7.8	7.9
Pay:	n/a	4.0	4.4
Quality of life:	n/a	5.8	5.8
Business environment:	n/a	6.0	5.7

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	24	14
by clients	n/a	56	32

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	100	100
Another country	n/a	0	0
Per cent seriously considered working in another country	n/a	n/a	18

Earnings

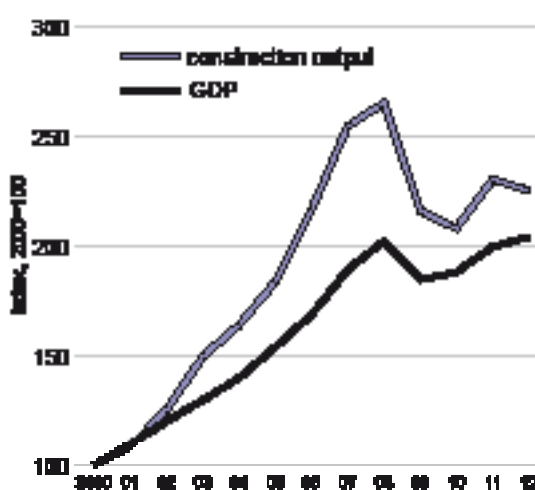
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	8,689	n/a
Partners / Directors	n/a	n/a	n/a
Private practice Salaried	n/a	5,792	n/a
Freelance	n/a	n/a	n/a
Other Private	n/a	n/a	n/a
Local / central govt	n/a	n/a	n/a
Other Public	n/a	n/a	n/a
ALL	n/a	6,951	n/a

* earnings values are unadjusted for PPP n/a due to small sample

Working Hours

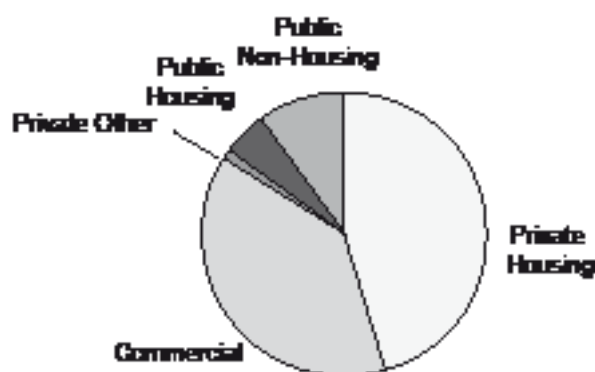
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	41.3	42.5
Partner / director	n/a	42.5	46.7
Private practice salaried	n/a	47.0	45.0
Freelance	n/a	20.0	40.0
Local / central govt	n/a	40.0	39.0

GDP & Construction Output



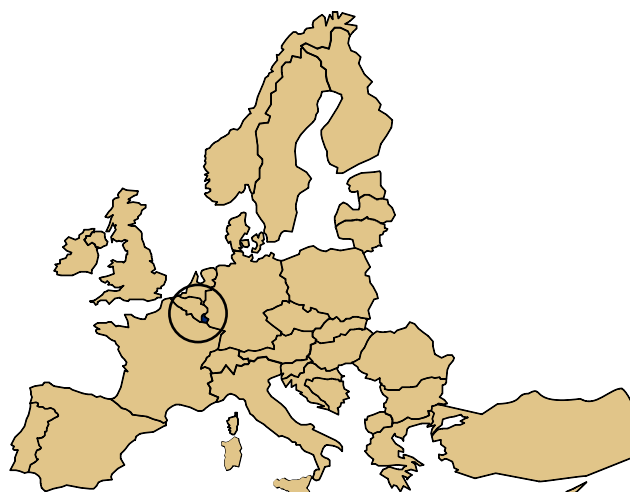
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

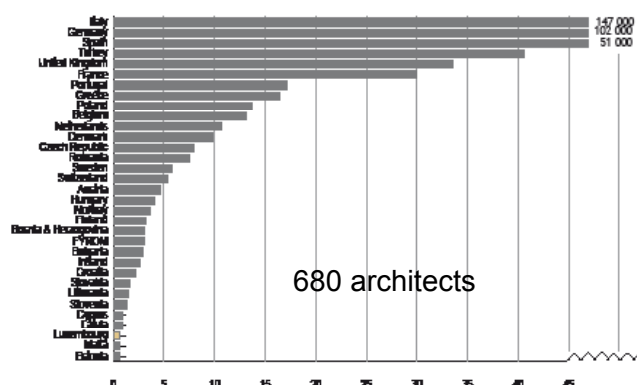


Response

	2008	2010	2012
Number contacted	n/a	n/a	n/a
Number of participants	n/a	26	22
Response rate	n/a	n/a	n/a
Accuracy of results at 95% confidence level	n/a	+/-19%	+/- 20.7



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	483,799	502,066	524,853
GDP, € millions	35,982	40,267	42,822
GDP per head	75,400	80,202	81,588
Construction output, € m	4,585	5,202	5,306
Construction as % GDP	13	13	12

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	600	600	680
Number of architects per 1000 population	1.2	1.2	1.3
Number male architects	414	n/a	490
Number female archts	186	n/a	190
Number aged under 40	234	n/a	260

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	32	n/a	38
Average revenue per:			
2 person practice	n/a	n/a	154,000
6 to 10 person practice	605,778	n/a	683,115

Private Practice

	2008	2010	2012
Number of practices	194	n/a	166
estimated number practices with -			
1 architectural staff	127	n/a	85
2-5 architectural staff	52	n/a	60
6-30 architectural staff	15	n/a	22
31+ architectural staff	0	n/a	0

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	31	n/a	39
Partners / Directors	14	n/a	24
Private practice Salaried	15	n/a	10
Private in-house	1	n/a	0
Freelance	16	n/a	9
Other Private	16	n/a	19
Local / central govt	5	n/a	0
Other Public	1	n/a	0

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.5	n/a	7.4
Pay:	5.5	n/a	5.4
Quality of life:	6.4	n/a	5.8
Business environment:	6.5	n/a	6.1

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	43	n/a	39
by clients	70	n/a	62

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	89	n/a	96.6
Another country	11	n/a	3.4
Per cent seriously considered working in another country	n/a	n/a	28

Earnings

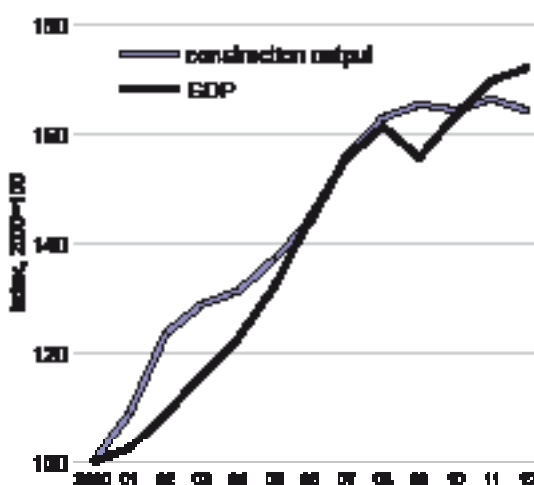
	average earnings €s *		
	2008	2010	2012
Sole Principals	57,000	n/a	56,000
Partners / Directors	45,000	n/a	75,000
Private practice Salaried	90,000	n/a	82,000
Freelance	n/a	n/a	31,000
Other Private	50,000	n/a	50,000
Local / central govt	n/a	n/a	n/a
Other Public	n/a	n/a	n/a
ALL	50,000	n/a	56,400

* earnings values are unadjusted for PPP

Working Hours

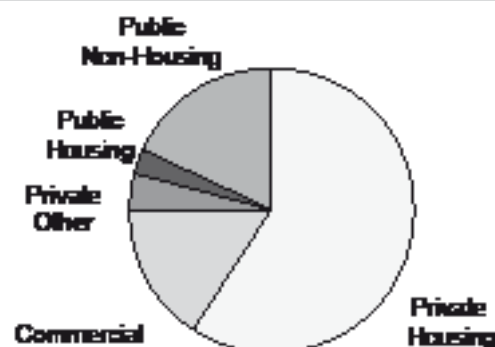
	average number hours worked per week		
	2008	2010	2012
Sole Principal	50.0	n/a	50.2
Partner / director	49.6	n/a	48.7
Private practice salaried	47.6	n/a	48.5
Freelance	46.6	n/a	45.7
Local / central govt	43.7	n/a	n/a

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	543	n/a	516
Number of participants	75	n/a	89
Response rate	14%	n/a	17.2
Accuracy of results at 95% confidence level	+/- 11%	n/a	+/- 9.7



Social & Economic

	2008	2010	2012*
Population	410,584	414,372	420,085
GDP, € millions	5,377	6,235	6,499
GDP per head	13,100	15,046	15,471
Construction output, € m	415	503	501
Construction as % GDP	8	8	8

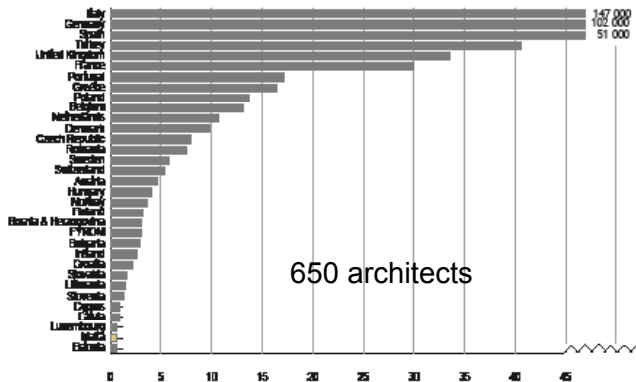
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	500	650	650
Number of architects per 1000 population	1.2	1.6	1.5
Number male architects	405	n/a	490
Number female archts	95	n/a	160
Number aged under 40	265	n/a	370

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	13	n/a	16
Average revenue per:			
2 person practice	83,375	n/a	86,125
6 to 10 person practice	236,250	n/a	n/a

Private Practice

	2008	2010	2012
Number of practices	83	n/a	146
estimated number practices with -			
1 architectural staff	33	n/a	56
2-5 architectural staff	33	n/a	81
6-30 architectural staff	15	n/a	9
31+ architectural staff	3	n/a	0

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	9	n/a	18
Partners / Directors	15	n/a	16
Private practice Salaried	35	n/a	29
Private in-house	1	n/a	0
Freelance	12	n/a	3
Other Private	5	n/a	11
Local / central govt	18	n/a	8
Other Public	5	n/a	16

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.7	n/a	7.1
Pay:	5.1	n/a	4.4
Quality of life:	6.2	n/a	5.3
Business environment:	6.3	n/a	5.3

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	35	n/a	34
by clients	52	n/a	39

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	86	n/a	97.5
Another country	14	n/a	2.5
Per cent seriously considered working in another country	n/a	n/a	32

Earnings

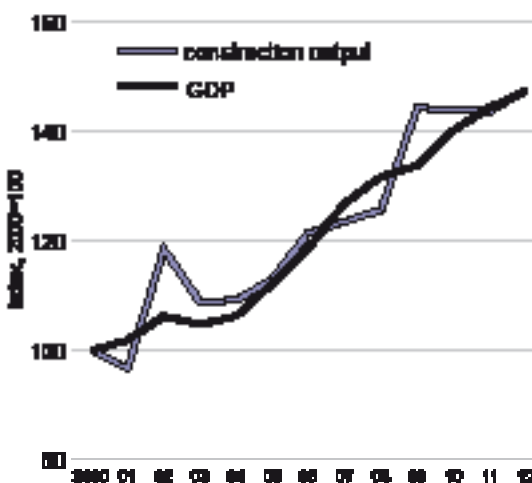
	average earnings €s *		
	2008	2010	2012
Sole Principals	51,000	n/a	25,000
Partners / Directors	42,000	n/a	45,000
Private practice Salaried	20,000	n/a	25,000
Freelance	25,000	n/a	50,000
Other Private	n/a	n/a	45,000
Local / central govt	n/a	n/a	25,000
Other Public	n/a	n/a	21,300
ALL	25,250	n/a	25,000

* earnings values are unadjusted for PPP

Working Hours

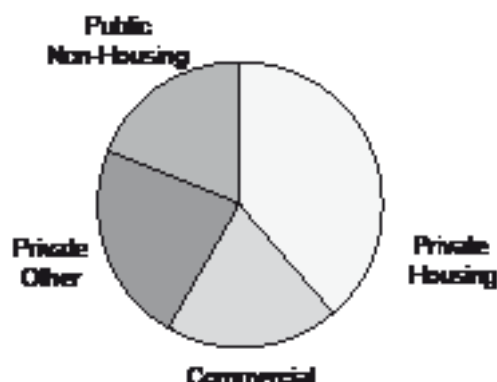
	average number hours worked per week		
	2008	2010	2012
Sole Principal	57.1	n/a	52.9
Partner / director	54.1	n/a	46.3
Private practice salaried	45.8	n/a	42.3
Freelance	48.8	n/a	55.0
Local / central govt	46.9	n/a	56.7

GDP & Construction Output



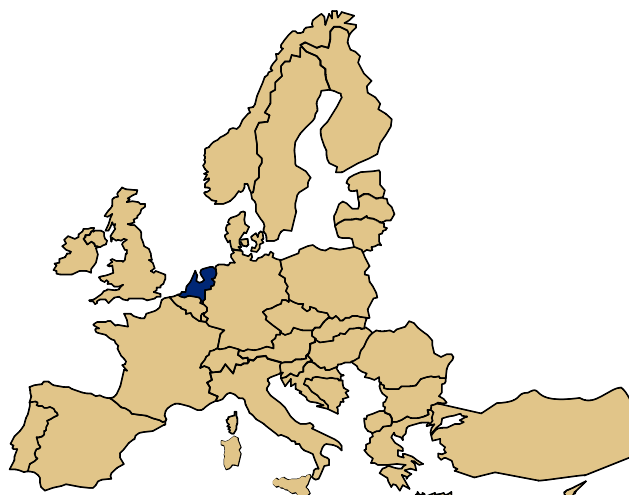
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

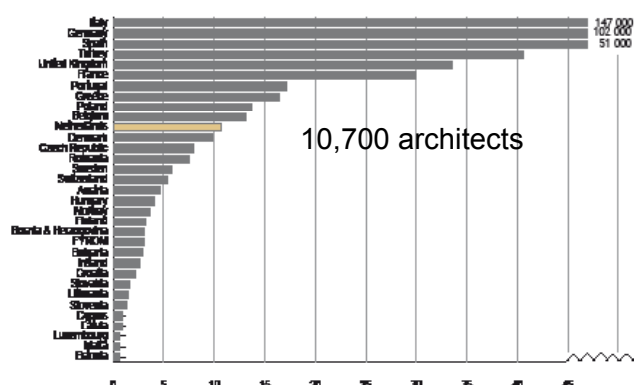


Response

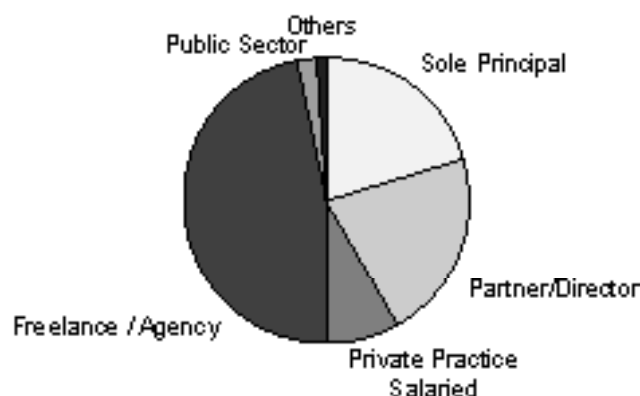
	2008	2010	2012
Number contacted	400	n/a	272
Number of participants	95	n/a	41
Response rate	24%	n/a	15.1
Accuracy of results at 95% confidence level	+/- 9%	n/a	+/- 14.8



Number of Architects 2012



Architects' Field of Employment 2010



Social & Economic

	2008	2010	2012*
Population	16,404,282	16,577,612	16,730,348
GDP, € millions	596,226	585,318	606,111
GDP per head	36,346	35,308	36,228
Construction output, € m	85,665	75,162	76,913
Construction as % GDP	14	13	13

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	9,100	9,900	10,700
Number of architects per 1000 population	0.6	0.6	0.6
Number male architects	7,826	7,994	n/a
Number female archts	1,274	1,906	n/a
Number aged under 40	2,912	3,238	n/a

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	902	976	807*
Average revenue per:			
2 person practice	103,714	228,532	n/a
6 to 10 person practice	325,909	835,500	n/a

* source for 2012: BNA Annual Financial Benchmark Survey, 2012 (data refers to 2011) *Benchmark BNA jaarcijfers 2011*

Private Practice

	2008	2010	2012
Number of practices	3,304	3,255	n/a
estimated number practices with -			
1 architectural staff	1,896	2,058	n/a
2-5 architectural staff	863	852	n/a
6-30 architectural staff	469	321	n/a
31+ architectural staff	76	23	n/a

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	31	20	n/a
Partners / Directors	45	21	n/a
Private practice Salaried	14	8	n/a
Private in-house	3	0	n/a
Freelance	3	7	n/a
Other Private	0	41	n/a
Local / central govt	2	0	n/a
Other Public	3	3	n/a

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	8.3	7.9	n/a
Pay:	6.3	6.0	n/a
Quality of life:	7.7	7.6	n/a
Business environment:	7.5	7.3	n/a

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	47	44	n/a
by clients	66	76	n/a

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	93.3	98.5	n/a
Another country	6.7	1.5	n/a
Per cent seriously considered working in another country	n/a	n/a	n/a

Earnings

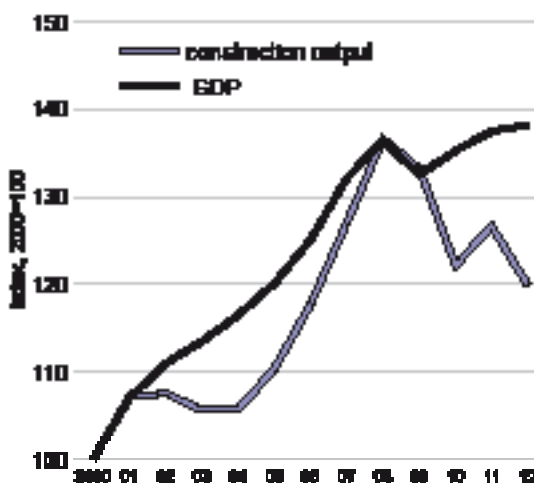
	average earnings €s *		
	2008	2010	2012
Sole Principals	45,144	45,000	n/a
Partners / Directors	103,500	71,000	n/a
Private practice Salaried	42,000	60,000	n/a
Freelance	n/a	50,000	n/a
Other Private	n/a	64,500	n/a
Local / central govt	n/a	n/a	n/a
Other Public	n/a	83,000	n/a
ALL	54,000	55,000	n/a

* earnings values are unadjusted for PPP

Working Hours

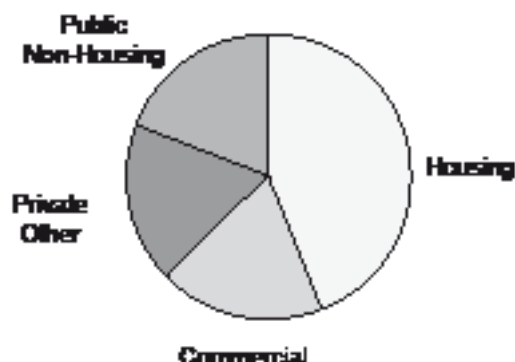
	average number hours worked per week		
	2008	2010	2012
Sole Principal	48.0	48.4	n/a
Partner / director	47.3	45.9	n/a
Private practice salaried	46.2	48.0	n/a
Freelance	42.0	40.0	n/a
Local / central govt	50.0	n/a	n/a

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2011*

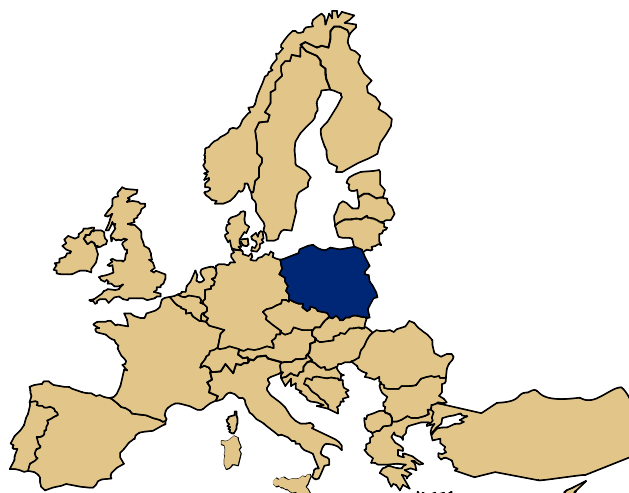


* source: BNA Annual Financial Benchmark Survey, 2012 (data refers to 2011) *Benchmark BNA jaarcijfers 2011*

Response

	2008	2010	2012*
Number contacted	1,167	2,410	n/a
Number of participants	118	214	n/a
Response rate	10%	9%	n/a
Accuracy of results at 95% confidence level	+/-9%	+/-7%	n/a

* Non-participant in 2012 Survey but data provided with thanks from BNA Annual Financial Benchmark Survey, 2012



Social & Economic

	2008	2010	2012*
Population	38,115,641	38,167,329	38,208,618
GDP, € millions	363,154	353,306	370,014
GDP per head	9,528	9,257	9,684
Construction output, € m	68,672	61,695	68,723
Construction as % GDP	19	17	19

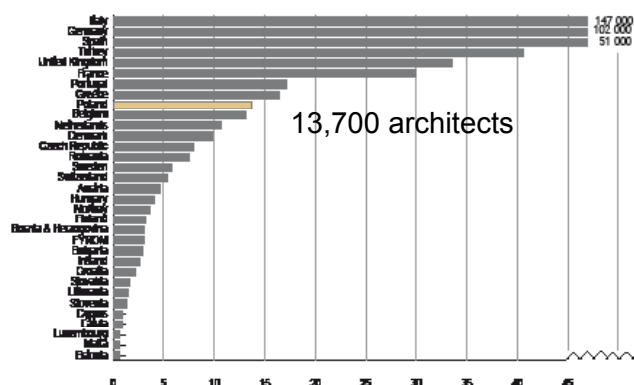
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	13,500	13,500	13,700
Number of architects per 1000 population	0.4	0.4	0.4
Number male architects	n/a	7,271	7,490
Number female archts	n/a	6,229	6,210
Number aged under 40	n/a	7,223	7,000

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	259	211
Average revenue per:			
2 person practice	n/a	35,645	24,566
6 to 10 person practice	n/a	208,280	132,438

Private Practice

	2008	2010	2012
Number of practices	n/a	4,330	4,423
estimated number practices with -			
1 architectural staff	n/a	2,221	2,516
2-5 architectural staff	n/a	1,787	1,544
6-30 architectural staff	n/a	306	359
31+ architectural staff	n/a	15	4

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	45	41
Partners / Directors	n/a	13	14
Private practice Salaried	n/a	26	27
Private in-house	n/a	1	2
Freelance	n/a	5	5
Other Private	n/a	5	3
Local / central govt	n/a	4	5
Other Public	n/a	1	2

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	7.3	6.7
Pay:	n/a	4.6	4.0
Quality of life:	n/a	5.4	4.7
Business environment:	n/a	5.7	5.3

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	46	50
by clients	n/a	65	62

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	95.7	92.3
Another country	n/a	4.3	7.7
Per cent seriously considered working in another country	n/a	n/a	29

Earnings

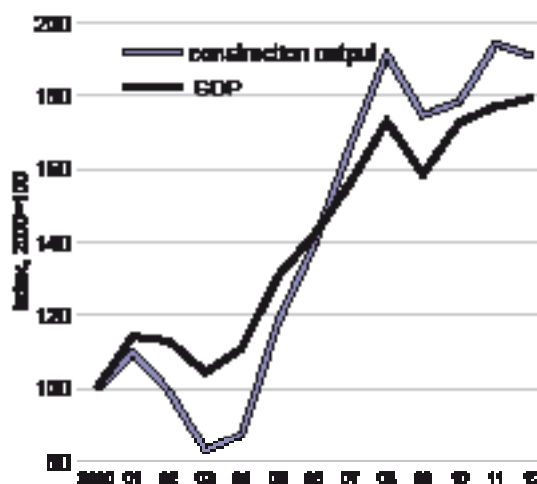
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	13,604	14,453
Partners / Directors	n/a	22,674	23,487
Private practice Salaried	n/a	12,697	11,804
Freelance	n/a	14,864	9,154
Other Private	n/a	21,414	19,223
Local / central govt	n/a	13,730	8,672
Other Public	n/a	8,818	1,349
ALL	n/a	14,612	13,249

* earnings values are unadjusted for PPP

Working Hours

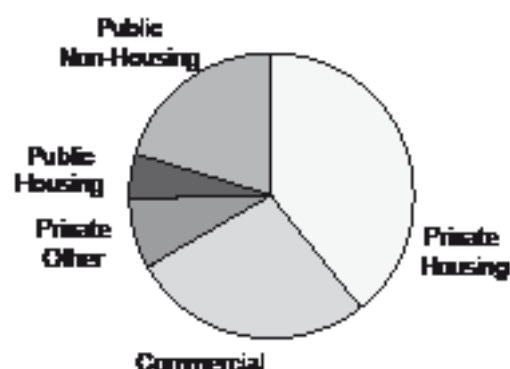
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	46.0	48.4
Partner / director	n/a	50.0	50.1
Private practice salaried	n/a	44.6	40.8
Freelance	n/a	39.9	42.5
Local / central govt	n/a	41.2	41.9

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	n/a	7,523	10,272
Number of participants	n/a	704	560
Response rate	n/a	9%	5.5
Accuracy of results at 95% confidence level	n/a	+/-4%	+/- 4.1



Portugal



Social & Economic

	2008	2010	2012*
Population	10,617,575	10,637,713	10,541,840
GDP, € millions	171,983	172,670	170,907
GDP per head	16,198	16,232	16,212
Construction output, € m	29,541	25,246	22,671
Construction as % GDP	17	15	13

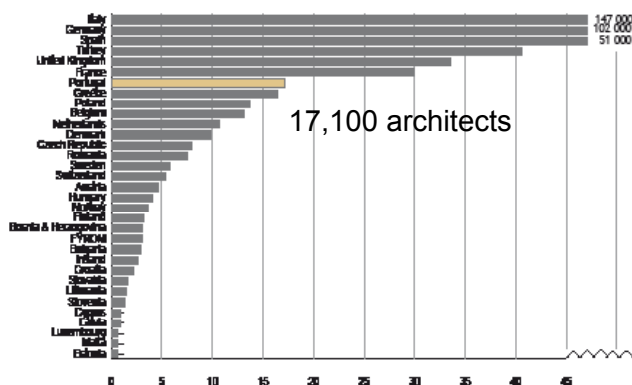
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012*
Number of architects *	16,300	13,000	17,100
Number of architects per 1000 population	1.5	1.2	1.6
Number male architects	n/a	n/a	9,600
Number female archts	n/a	n/a	7,500
Number aged under 40	n/a	n/a	12,500

* Estimate. The 2012 has been revised and is based on data from a different source compared with 2010 and 2008.

Number of Architects 2012



Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	n/a	261
Average revenue per:			
2 person practice	n/a	n/a	35,078
6 to 10 person practice	n/a	n/a	508,499

Private Practice

	2008	2010	2012
Number of practices	n/a	n/a	3,226
estimated number practices with -			
1 architectural staff	n/a	n/a	1,485
2-5 architectural staff	n/a	n/a	1,522
6-30 architectural staff	n/a	n/a	219
31+ architectural staff	n/a	n/a	0

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	n/a	11
Partners / Directors	n/a	n/a	12
Private practice Salaried	n/a	n/a	35
Private in-house	n/a	n/a	1
Freelance	n/a	n/a	15
Other Private	n/a	n/a	6
Local / central govt	n/a	n/a	13
Other Public	n/a	n/a	7

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	n/a	6.6
Pay:	n/a	n/a	3.1
Quality of life:	n/a	n/a	4.4
Business environment:	n/a	n/a	5.8

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	n/a	30
by clients	n/a	n/a	49

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	n/a	91.0
Another country	n/a	n/a	9.0
Per cent seriously considered working in another country	n/a	n/a	59

Earnings

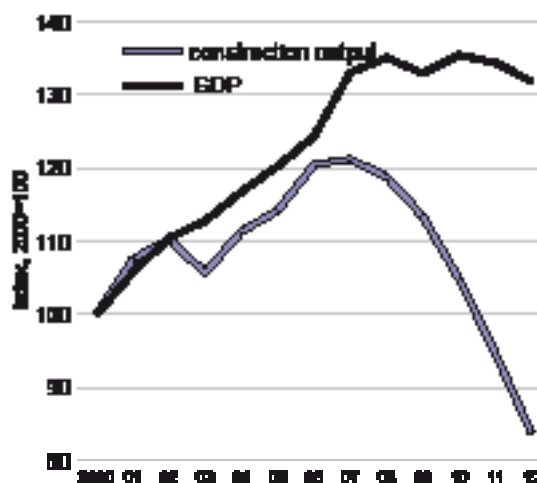
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	n/a	13,000
Partners / Directors	n/a	n/a	14,300
Private practice Salaried	n/a	n/a	10,600
Freelance	n/a	n/a	10,850
Other Private	n/a	n/a	11,900
Local / central govt	n/a	n/a	15,521
Other Public	n/a	n/a	18,150
ALL	n/a	n/a	12,000

* earnings values are unadjusted for PPP

Working Hours

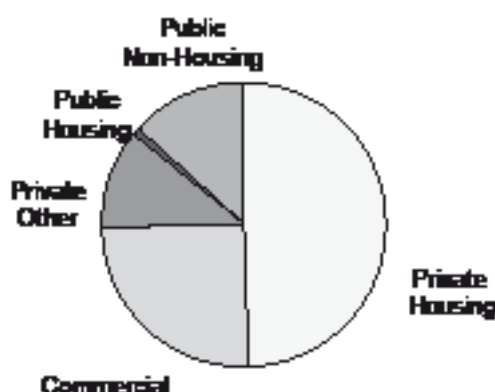
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	n/a	43.8
Partner / director	n/a	n/a	43.1
Private practice salaried	n/a	n/a	40.0
Freelance	n/a	n/a	41.3
Local / central govt	n/a	n/a	36.0

GDP & Construction Output



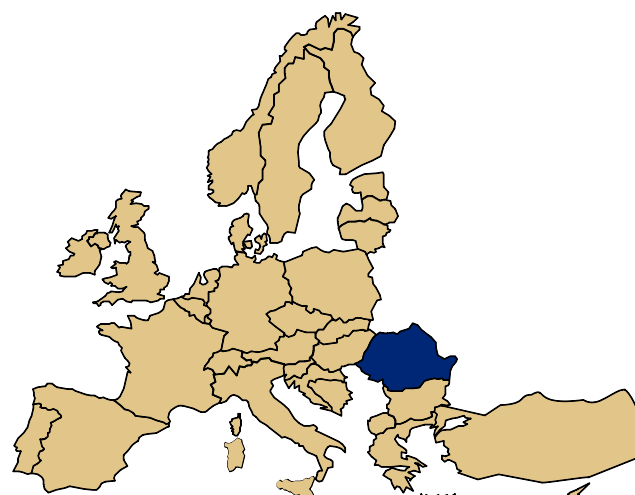
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

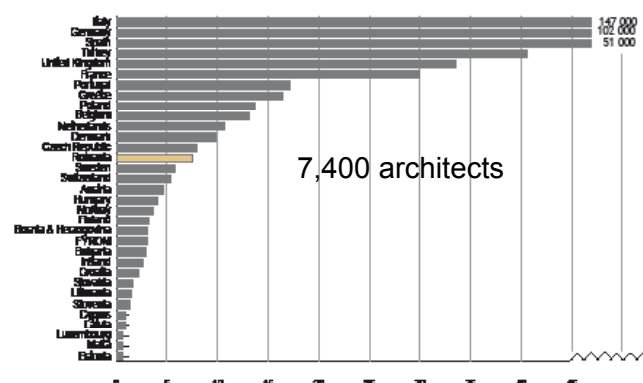


Response

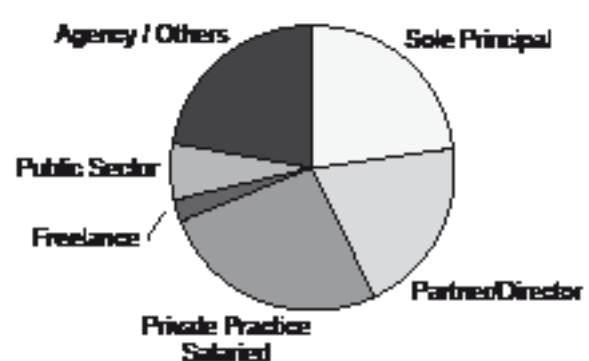
	2008	2010	2012
Number contacted	n/a	n/a	15,469
Number of participants	n/a	n/a	1,678
Response rate	n/a	n/a	10.8
Accuracy of results at 95% confidence level	n/a	n/a	+/- 2.2



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	21,528,627	21,462,186	21,355,849
GDP, € millions	139,765	123,134	136,479
GDP per head	6,492	5,737	6,391
Construction output, € m	31,814	19,877	22,034
Construction as % GDP	23	16	16

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	5,500	5,500	7,400
Number of architects per 1000 population	0.3	0.3	0.3
Number male architects	2,860	2,913	4,140
Number female archts	2,640	2,587	3,260
Number aged under 40	2,640	2,682	3,500

* Estimate. The 2012 has been revised and is based on data from a different source compared with 2010 and 2008.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	113	64	90
Average revenue per:			
2 person practice	39,680	29,227	52,789
6 to 10 person practice	129,915	68,073	175,358

Private Practice

	2008	2010	2012
Number of practices	1,275	1,697	1,851
estimated number practices with -			
1 architectural staff	478	1,026	756
2-5 architectural staff	557	560	992
6-30 architectural staff	225	111	100
31+ architectural staff	15	0	2

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	14	28	23
Partners / Directors	23	12	20
Private practice Salaried	37	37	26
Private in-house	1	2	1
Freelance	10	10	3
Other Private	9	4	21
Local / central govt	3	2	1
Other Public	5	5	5

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	8.4	8.3	8.3
Pay:	6.0	4.8	4.9
Quality of life:	6.6	6.0	5.9
Business environment:	6.7	5.3	5.4

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	40	44	36
by clients	54	61	63

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	93.7	97.8	98.2
Another country	6.3	2.2	1.8
Per cent seriously considered working in another country	n/a	n/a	32

Earnings

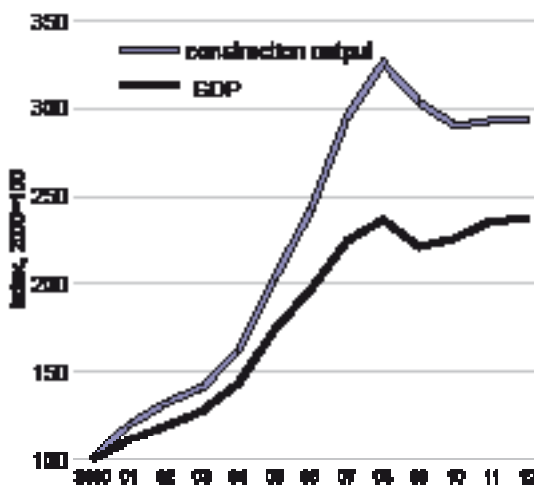
	average earnings €s *		
	2008	2010	2012
Sole Principals	16,788	4,699	11,349
Partners / Directors	26,889	5,286	7,149
Private practice Salaried	11,472	5,286	5,517
Freelance	14,943	3,552	6,755
Other Private	10,912	5,874	4,053
Local / central govt	11,192	11,445	3,242
Other Public	11,836	3,524	1,430
ALL	13,990	4,699	6,485

* earnings values are unadjusted for PPP

Working Hours

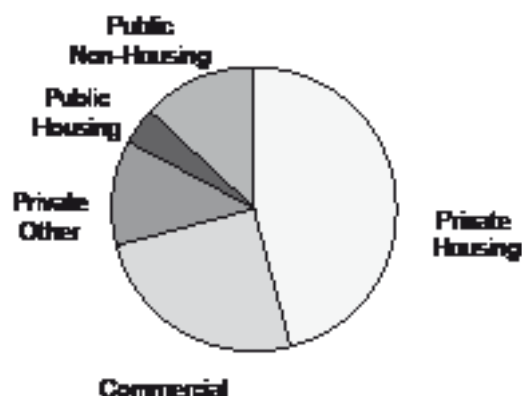
	average number hours worked per week		
	2008	2010	2012
Sole Principal	51.5	43.6	43.8
Partner / director	50.5	43.4	44.0
Private practice salaried	45.6	42.2	41.8
Freelance	50.8	40.2	43.0
Local / central govt	45.8	n/a	40.0

GDP & Construction Output



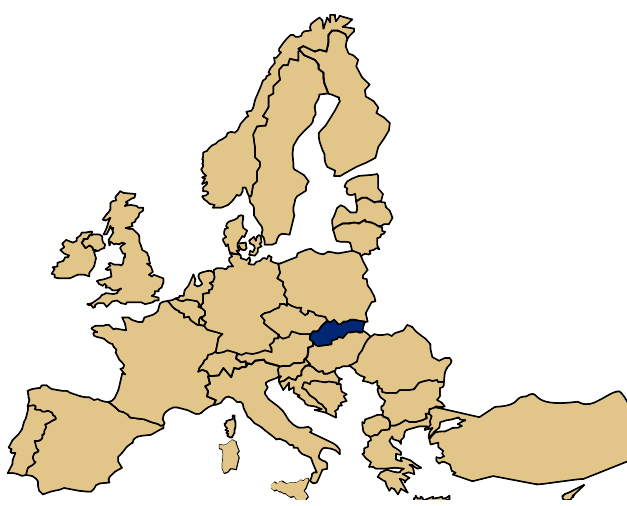
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

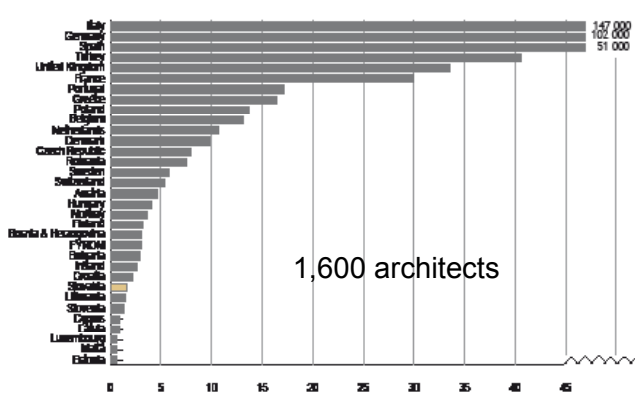


Response

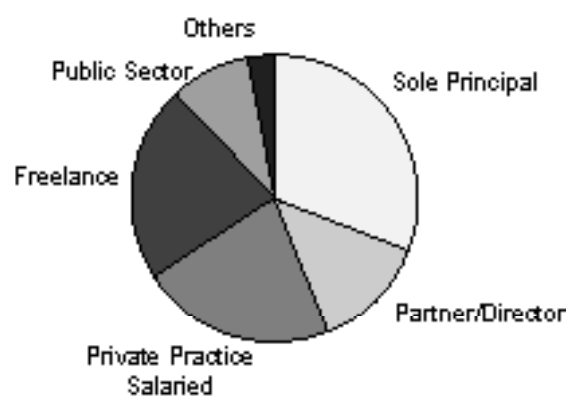
	2008	2010	2012
Number contacted	3,070	547	899
Number of participants	607	204	365
Response rate	20%	37%	40.6
Accuracy of results at 95% confidence level	+/-4%	+/-7%	+/- 5.0



Number of Architects 2012



Architects' Field of Employment 2010



Social & Economic

	2008	2010	2012*
Population	5,400,998	5,424,925	5,404,322
GDP, € millions	64,572	65,592	71,730
GDP per head	11,956	12,091	13,273
Construction output, € m	14,149	13,335	12,761
Construction as % GDP	22	20	18

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	1,300	1,600	1,600
Number of architects per 1000 population	0.2	0.3	0.3
Number male architects	n/a	1,358	n/a
Number female archts	n/a	242	n/a
Number aged under 40	n/a	436	n/a

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	41	n/a
Average revenue per:			
2 person practice	n/a	n/a	n/a
6 to 10 person practice	n/a	n/a	n/a

Private Practice

	2008	2010	2012
Number of practices	n/a	294	n/a
estimated number practices with -			
1 architectural staff	n/a	136	n/a
2-5 architectural staff	n/a	106	n/a
6-30 architectural staff	n/a	50	n/a
31+ architectural staff	n/a	1	n/a

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	31	n/a
Partners / Directors	n/a	13	n/a
Private practice Salaried	n/a	22	n/a
Private in-house	n/a	0	n/a
Freelance	n/a	22	n/a
Other Private	n/a	3	n/a
Local / central govt	n/a	3	n/a
Other Public	n/a	6	n/a

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	7.5	n/a
Pay:	n/a	4.8	n/a
Quality of life:	n/a	6.0	n/a
Business environment:	n/a	5.8	n/a

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	24	n/a
by clients	n/a	70	n/a

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	93.9	n/a
Another country	n/a	6.1	n/a
Per cent seriously considered working in another country	n/a	n/a	n/a

Earnings

	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	15,000	n/a
Partners / Directors	n/a	38,000	n/a
Private practice Salaried	n/a	13,650	n/a
Freelance	n/a	13,000	n/a
Other Private	n/a	n/a	n/a
Local / central govt	n/a	n/a	n/a
Other Public	n/a	n/a	n/a
ALL	n/a	16,378	n/a

* earnings values are unadjusted for PPP

Working Hours

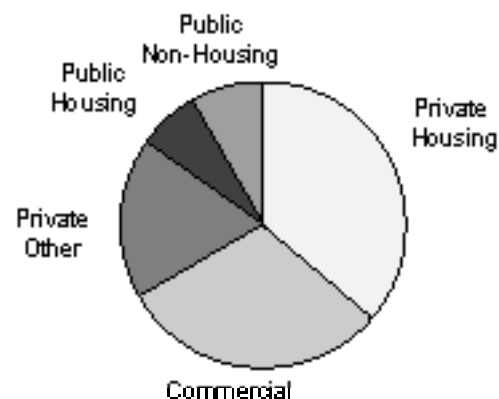
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	43.7	n/a
Partner / director	n/a	35.5	n/a
Private practice salaried	n/a	38.8	n/a
Freelance	n/a	40.0	n/a
Local / central govt	n/a	40.0	n/a

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2010

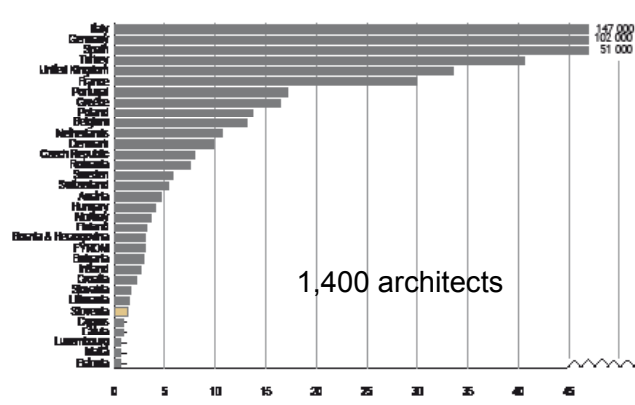


Response

	2008	2010	2012
Number contacted	n/a	1,170	n/a
Number of participants	n/a	34	n/a
Response rate	n/a	3%	n/a
Accuracy of results at 95% confidence level	n/a	+/-17%	n/a



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	2,025,866	2,046,976	2,055,496
GDP, € millions	37,305	35,800	36,172
GDP per head	18,414	17,489	17,598
Construction output, € m	9,428	6,585	4,864
Construction as % GDP	25	18	13

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	1,350	1,400	1,400
Number of architects per 1000 population	0.7	0.7	0.7
Number male architects	729	700	800
Number female archts	621	700	600
Number aged under 40	702	600	450

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	41	10	42
Average revenue per:			
2 person practice	51,220	n/a	n/a
6 to 10 person practice	342,832	n/a	n/a

Private Practice

	2008	2010	2012
Number of practices	288	186	417
estimated number practices with -			
1 architectural staff	137	75	202
2-5 architectural staff	100	59	177
6-30 architectural staff	49	46	37
31+ architectural staff	3	5	0

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	18	21	34
Partners / Directors	13	24	19
Private practice Salaried	33	36	25
Private in-house	2	0	0
Freelance	18	10	13
Other Private	7	2	3
Local / central govt	5	5	3
Other Public	3	2	3

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.9	8.2	7.1
Pay:	5.7	4.6	3.4
Quality of life:	6.6	6.1	5.0
Business environment:	6.5	6.0	4.5

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	21	16	17
by clients	37	33	16

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	100	92.7	97.1
Another country	0	7.3	2.9
Per cent seriously considered working in another country	n/a	n/a	62

Earnings

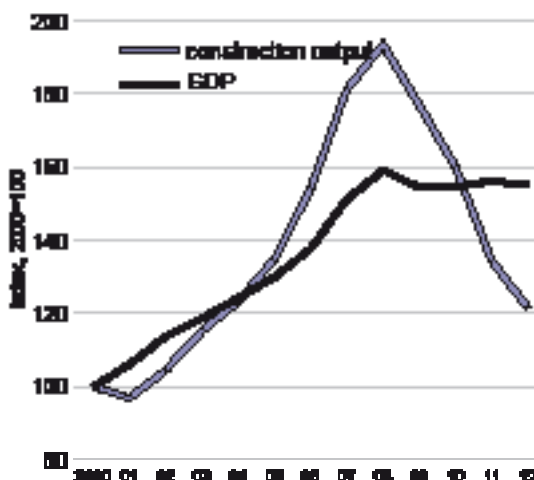
	average earnings €s *		
	2008	2010	2012
Sole Principals	33,000	24,000	20,500
Partners / Directors	26,000	17,000	33,000
Private practice Salaried	16,500	30,000	4,493
Freelance	12,000	7,550	7,750
Other Private	15,600	n/a	22,000
Local / central govt	17,000	n/a	13,500
Other Public	n/a	n/a	1,200
ALL	24,500	25,000	15,000

* earnings values are unadjusted for PPP

Working Hours

	average number hours worked per week		
	2008	2010	2012
Sole Principal	47.6	43.9	44.7
Partner / director	48.9	40.6	46.2
Private practice salaried	45.7	42.5	41.7
Freelance	45.1	40.2	42.5
Local / central govt	44.0	34.0	40.0

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

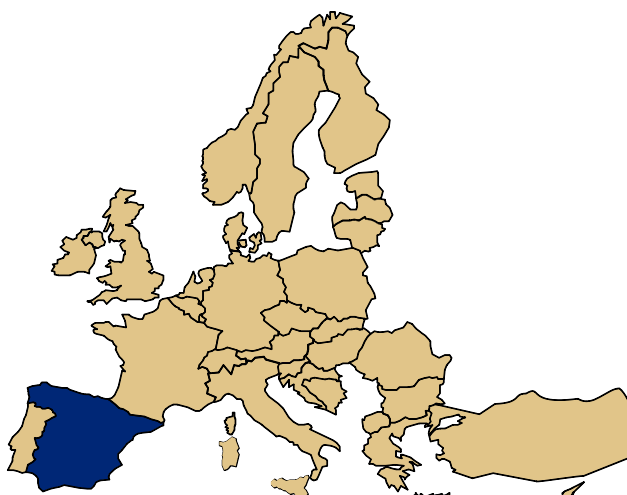
Workloads 2012



Response

	2008	2010	2012
Number contacted	688	614	716
Number of participants	96	43	37
Response rate	14%	7%	5.2
Accuracy of results at 95% confidence level	+/-10%	+/-15%	+/- 15.9

Spain



Social & Economic

	2008	2010	2012*
Population	45,283,259	45,989,016	46,196,277
GDP, € millions	1,087,788	1,048,883	1,063,355
GDP per head	24,022	22,807	23,018
Construction output, € m	270,999	191,820	156,525
Construction as % GDP	25	18	15

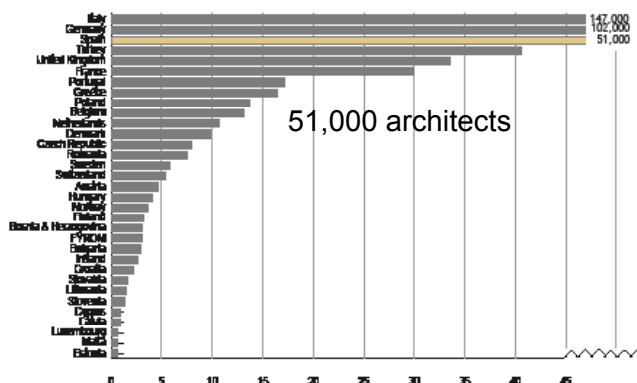
*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	45,000	50,000	51,000
Number of architects per 1000 population	1.0	1.1	1.1
Number male architects	n/a	n/a	38,460
Number female archts	n/a	n/a	12,540
Number aged under 40	n/a	n/a	28,430

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Number of Architects 2012



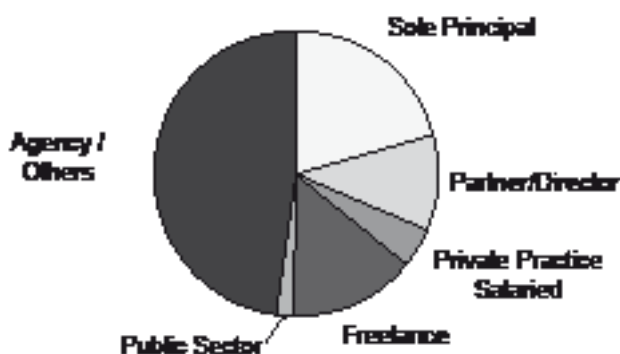
Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	n/a	n/a	336
Average revenue per:			
2 person practice	n/a	n/a	58,452
6 to 10 person practice	n/a	n/a	193,125

Private Practice

	2008	2010	2012
Number of practices	n/a	n/a	8,153
estimated number practices with -			
1 architectural staff	n/a	n/a	5,143
2-5 architectural staff	n/a	n/a	2,832
6-30 architectural staff	n/a	n/a	178
31+ architectural staff	n/a	n/a	0

Architects' Field of Employment 2012



Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	n/a	n/a	21
Partners / Directors	n/a	n/a	11
Private practice Salaried	n/a	n/a	5
Private in-house	n/a	n/a	0
Freelance	n/a	n/a	14
Other Private	n/a	n/a	48
Local / central govt	n/a	n/a	1
Other Public	n/a	n/a	1

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	n/a	n/a	7.1
Pay:	n/a	n/a	2.8
Quality of life:	n/a	n/a	4.0
Business environment:	n/a	n/a	5.0

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	n/a	n/a	21
by clients	n/a	n/a	43

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	n/a	n/a	98.9
Another country	n/a	n/a	1.1
Per cent seriously considered working in another country	n/a	n/a	70

Earnings

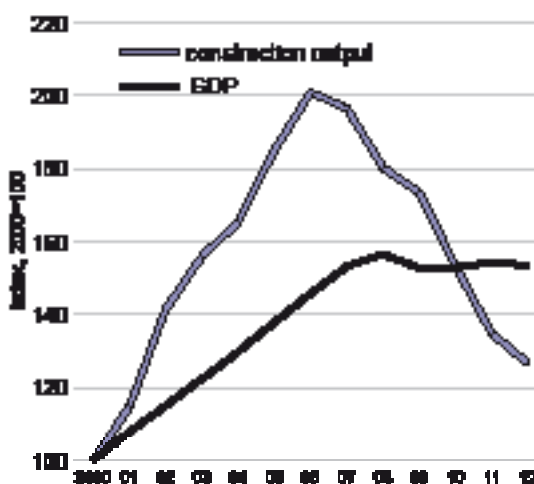
	average earnings €s *		
	2008	2010	2012
Sole Principals	n/a	n/a	30,250
Partners / Directors	n/a	n/a	18,000
Private practice Salaried	n/a	n/a	16,000
Freelance	n/a	n/a	15,000
Other Private	n/a	n/a	26,400
Local / central govt	n/a	n/a	20,000
Other Public	n/a	n/a	4,200
ALL	n/a	n/a	20,000

* earnings values are unadjusted for PPP

Working Hours

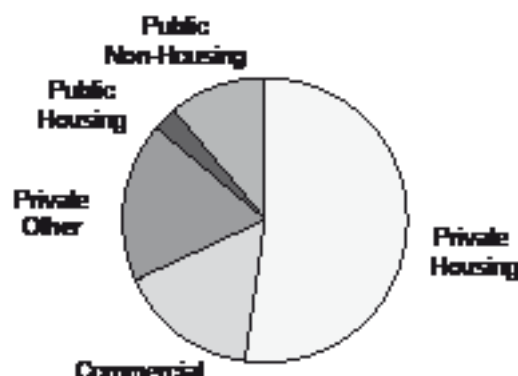
	average number hours worked per week		
	2008	2010	2012
Sole Principal	n/a	n/a	45.5
Partner / director	n/a	n/a	42.7
Private practice salaried	n/a	n/a	40.0
Freelance	n/a	n/a	46.5
Local / central govt	n/a	n/a	60.0

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

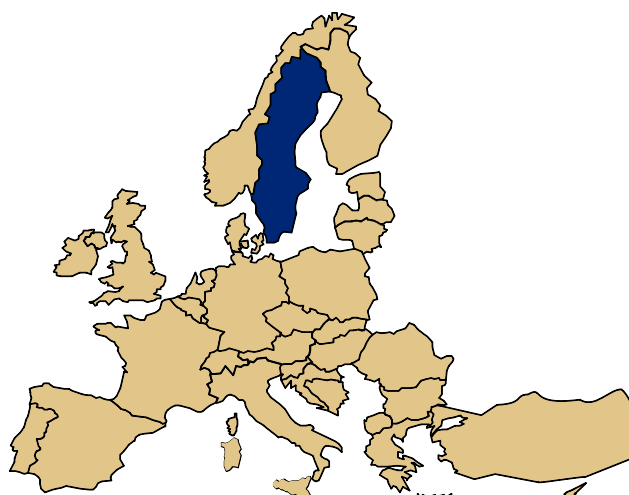
Workloads 2012



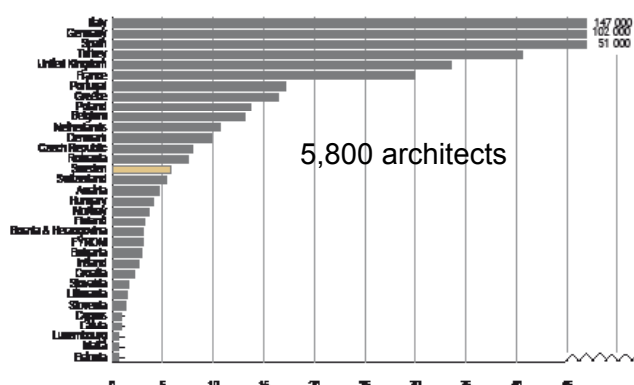
Response

	2008	2010	2012
Number contacted	n/a	n/a	n/a
Number of participants	n/a	n/a	184
Response rate	n/a	n/a	n/a
Accuracy of results at 95% confidence level	n/a	n/a	+/- 7.2

Sweden



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	9,182,927	9,340,682	9,482,855
GDP, € millions	334,227	339,215	387,886
GDP per head	36,397	36,316	40,904
Construction output, € m	38,237	38,269	38,608
Construction as % GDP	11	11	10

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	5,400	5,600	5,800
Number of architects per 1000 population	0.6	0.6	0.6
Number male architects	2,646	2,835	2,860
Number female archts	2,754	2,765	2,940
Number aged under 40	2,214	1,765	1,850

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	145	356	331
Average revenue per:			
2 person practice	257,250	170,469	196,857
6 to 10 person practice	304,719	640,615	700,687

Private Practice

	2008	2010	2012
Number of practices	631	1,067	1,207
estimated number practices with -			
1 architectural staff	360	646	786
2-5 architectural staff	148	287	310
6-30 architectural staff	102	125	104
31+ architectural staff	21	9	7

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	8	9	12
Partners / Directors	10	14	6
Private practice Salaried	35	42	39
Private in-house	1	2	1
Freelance	6	3	0
Other Private	6	3	16
Local / central govt	25	20	23
Other Public	9	7	3

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	8.1	8.0	8.2
Pay:	6.1	6.3	6.6
Quality of life:	7.8	7.6	7.4
Business environment:	7.1	7.1	7.1

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	56	60	54
by clients	65	66	68

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	94.1	99.5	97.7
Another country	5.9	0.5	2.3
Per cent seriously considered working in another country	n/a	n/a	12

Earnings

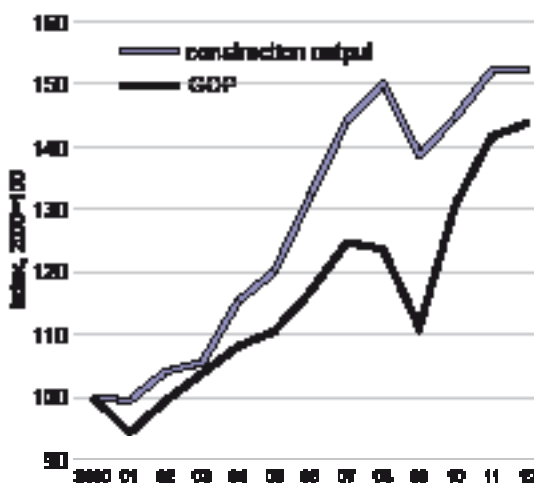
	average earnings €s *		
	2008	2010	2012
Sole Principals	38,376	38,659	51,710
Partners / Directors	44,772	53,693	59,620
Private practice Salaried	34,347	38,562	44,974
Freelance	31,980	35,437	73,119
Other Private	5,010	37,220	44,884
Local / central govt	34,538	38,122	44,783
Other Public	43,706	46,412	49,496
ALL	35,178	39,174	45,559

* earnings values are unadjusted for PPP

Working Hours

	average number hours worked per week		
	2008	2010	2012
Sole Principal	43.7	41.8	43.2
Partner / director	41.8	43.8	44.1
Private practice salaried	41.7	40.3	40.3
Freelance	38.0	39.6	38.3
Local / central govt	42.1	39.8	40.5

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

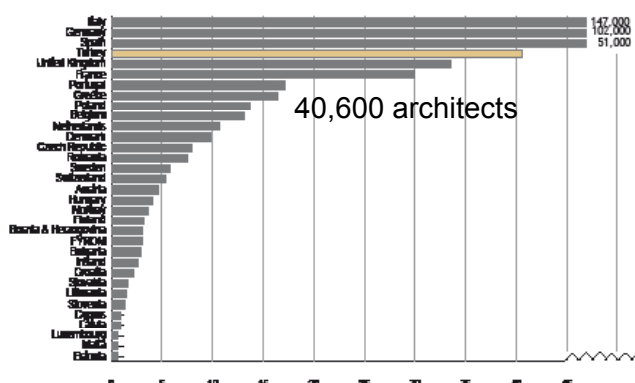


Response

	2008	2010	2012
Number contacted	363	4,277	5,028
Number of participants	1,188	1,200	1,523
Response rate	31%	28%	30.3
Accuracy of results at 95% confidence level	+/-5%	+/-3%	+/- 2.2



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	70,586,256	72,561,312	74,724,269
GDP, € millions	498,602	533,121	555,249
GDP per head	7,064	7,347	7,431
Construction output, € m	23,572	n/a	22,365
Construction as % GDP	5	n/a	4

*Construction output is 2011 actual, GDP is 2011 actual (2012 forecast not available)

Architectural Profession

	2008	2010	2012
Number of architects *	32,300	37,200	40,600
Number of architects per 1000 population	0.5	0.5	0.5
Number male architects	17,119	20,276	22,290
Number female archts	15,181	16,924	18,310
Number aged under 40	19,703	24,029	23,320

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	727	960	857
Average revenue per:			
2 person practice	38,556	40,837	47,648
6 to 10 person practice	154,042	388,736	225,491

Private Practice

	2008	2010	2012
Number of practices	6,497	5,836	7,232
estimated number practices with -			
1 architectural staff	2,136	1,488	1,097
2-5 architectural staff	2,959	3,433	5,063
6-30 architectural staff	1,221	874	1,059
31+ architectural staff	181	40	13

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	10	19	22
Partners / Directors	20	10	9
Private practice Salaried	35	41	42
Private in-house	1	1	0
Freelance	13	10	7
Other Private	4	3	2
Local / central govt	7	5	6
Other Public	11	12	11

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.8	7.7	7.8
Pay:	4.7	4.5	4.7
Quality of life:	5.5	5.3	5.4
Business environment:	5.8	5.7	5.6

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	31	32	26
by clients	15	13	8

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	93.6	96.6	95.9
Another country	6.4	3.4	4.1
Per cent seriously considered working in another country	n/a	n/a	40

Earnings

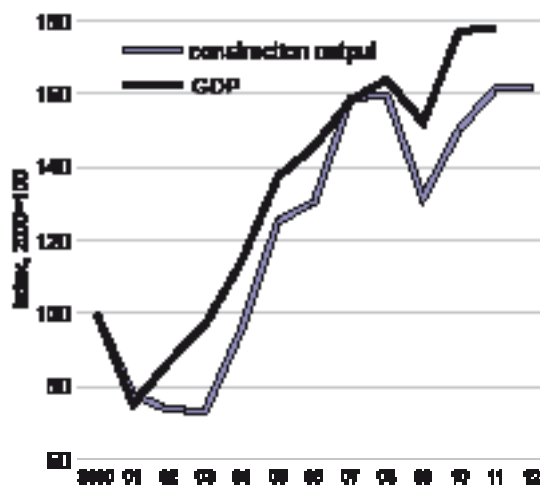
	average earnings €s *		
	2008	2010	2012
Sole Principals	26,366	30,909	28,012
Partners / Directors	26,366	18,545	25,857
Private practice Salaried	13,988	12,363	11,205
Freelance	17,577	17,669	14,760
Other Private	11,952	15,222	14,652
Local / central govt	14,062	12,363	15,514
Other Public	10,546	12,363	13,446
ALL	14,648	14,424	15,514

* earnings values are unadjusted for PPP

Working Hours

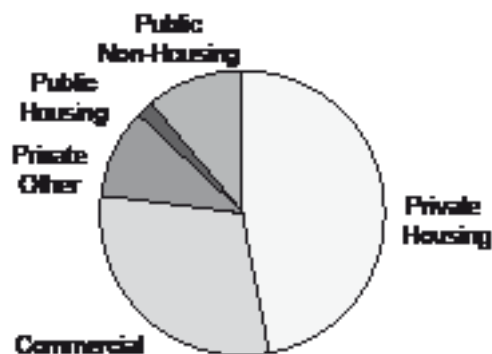
	average number hours worked per week		
	2008	2010	2012
Sole Principal	49.3	47.4	51.2
Partner / director	48.9	47.3	49.7
Private practice salaried	49.7	44.9	45.8
Freelance	46.6	44.1	49.6
Local / central govt	40.9	39.7	40.8

GDP & Construction Output



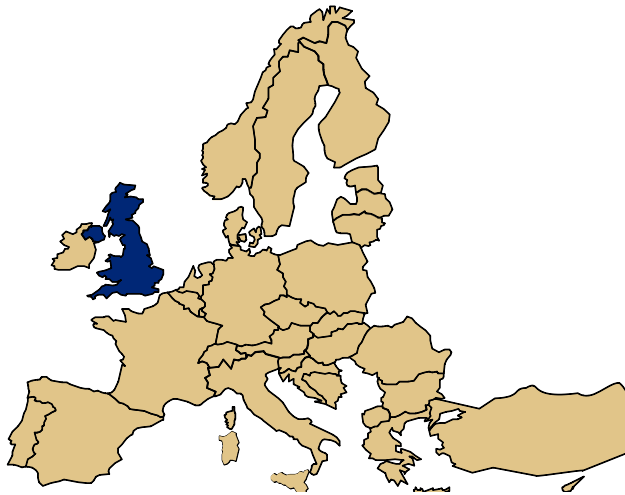
Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012

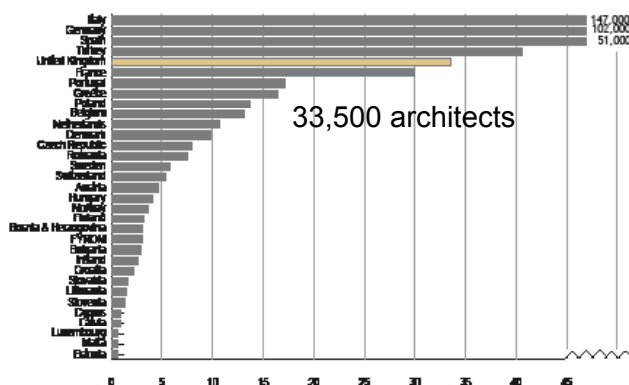


Response

	2008	2010	2012
Number contacted	15,981	20,494	26,336
Number of participants	1,594	1,332	910
Response rate	10%	7%	3.5
Accuracy of results at 95% confidence level	+/-2%	+/-3%	+/- 3.2



Number of Architects 2012



Architects' Field of Employment 2012



Social & Economic

	2008	2010	2012*
Population	61,185,981	62,008,048	62,989,550
GDP, € millions	1,815,417	1,692,703	1,746,962
GDP per head	29,670	27,298	27,734
Construction output, € m	251,309	251,329	243,857
Construction as % GDP	14	15	14

*Construction output is 2011 actual, GDP is forecast for 2012.

Architectural Profession

	2008	2010	2012
Number of architects *	31,600	32,900	33,500
Number of architects per 1000 population	0.5	0.5	0.5
Number male architects	24,964	23,030	26,700
Number female archts	6,636	9,870	6,800
Number aged under 40	16,116	11,515	9,940

* Estimate. The 2010 figure may be based on different sources or the estimation methodology refined so this accounts for some or all of the difference between the 2008 and 2010 figures.

Architectural Market

	€s		
	2008	2010	2012
Estimated market (€m)	2,800	1,956	2,006
Average revenue per:			
2 person practice	130,164	n/a	120,700
6 to 10 person practice	893,258	542,955	760,354

Private Practice

	2008	2010	2012
Number of practices	5,655	6,024	6,385
estimated number practices with -			
1 architectural staff	2,571	3,094	3,915
2-5 architectural staff	1,596	1,815	1,740
6-30 architectural staff	1,302	1,022	649
31+ architectural staff	186	93	81

Field of Employment

	per cent of architects		
	2008	2010	2012
Sole Principals	8	23	16
Partners / Directors	17	16	27
Private practice Salaried	56	43	40
Private in-house	4	1	2
Freelance	1	2	1
Other Private	7	3	6
Local / central govt	5	7	5
Other Public	3	4	4

Architects' Satisfaction

	average rating, 0 (lowest) to 10 (highest):		
	2008	2010	2012
Architecture as career:	7.2	6.9	7.2
Pay:	5.0	4.0	4.5
Quality of life:	6.1	5.7	6.1
Business environment:	6.2	5.7	6.1

Architects' Reputation

how architects believe they are regarded:	per cent 'quite' or 'very highly':		
	2008	2010	2012
by the general public	41	32	35
by clients	53	44	48

Cross-border Working

working or resident in:	per cent		
	2008	2010	2012
Home country	93.7	93.8	85.4
Another country	6.3	6.2	14.6
Per cent seriously considered working in another country	n/a	n/a	22

Earnings

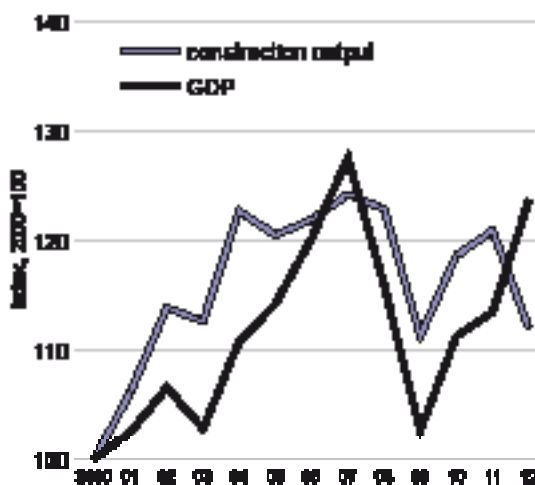
	average earnings €s *		
	2008	2010	2012
Sole Principals	50,992	12,076	41,338
Partners / Directors	58,373	48,306	61,327
Private practice Salaried	46,966	42,569	45,382
Freelance	n/a	43,475	49,062
Other Private	67,095	n/a	63,780
Local / central govt	n/a	46,675	51,021
Other Public	n/a	56,759	47,966
ALL	49,650	42,569	49,062

* earnings values are unadjusted for PPP

Working Hours

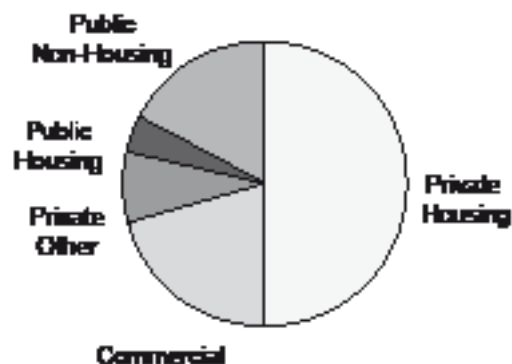
	average number hours worked per week		
	2008	2010	2012
Sole Principal	47.5	40.5	44.6
Partner / director	45.3	47.5	45.8
Private practice salaried	42.3	37.1	37.9
Freelance	n/a	37.8	39.8
Local / central govt	37.0	36.0	37.1

GDP & Construction Output



Source: Eurostat data converted to an index. The 2012 construction output figure is an estimate based on year to Quarter 2, 2012. The 2012 GDP figure is a forecast.

Workloads 2012



Response

	2008	2010	2012
Number contacted	1,450	n/a	21,936
Number of participants	127	100	1,828
Response rate	9%	n/a	8.3
Accuracy of results at 95% confidence level	+/-9%	+/-10%	+/- 2.2

Appendix I - Statistical & Methodological Notes

1. Method for weighting the 'All' figure

The 'EUROPE-25' 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.

In the previous two Sector Studies we attempted to revise up the 'not economically active' figure. The methodology to do this was based on an analysis of data was collected as part of 'Phase I' of the 2008 Sector Study. This Phase I data includes an estimate, by Member Organisations, of the numbers of 'inactive architects'. We

compared this with the survey figures and discovered that typically the Phase 1 results showed 12 per cent of architects were 'not economically active', compared with 2 per cent from the survey.

This year we decided against adjusting the 'not economically active' figure for two reasons:

1. past adjustments were based on research undertaken in 2008. Much has changed to the profession since then. We have no evidence as to how the 'not economically active' figure might have changed since 2008.
2. we now have three sets of survey data, gathered using identical methodologies. Although the data almost certainly still under-estimates the number of architects who are 'not economically active', the consistency of approach in compiling the datasets means we can make meaningful comparisons between the three survey years.

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) 2010 data was occasionally refined with reference to the 2008 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.



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

The Architectural Profession in Europe

The information you provide will be recorded anonymously; no individual is traced back to their reply.

The survey should take 10-15 minutes to complete.

Partially completed forms can be submitted at any time but cannot be saved for completion later.

Principals' Survey

YOURSELF

Please describe yourself at 01.05.2012

- 1 Gender
- 2 Age
- 3 For how many years have you been working as an Architect
- 4 Employment Status ?

YOUR WORK

Please describe your work at 01.05.2012

- 5 Working Hours How many hours do you work per week?
 hours per week
- 6 Your Main Field of Employment
If you have selected 'Other Private' or 'Other Public' then you may give details below

YOUR WORKPLACE

Please describe your workplace at 01.05.2012

- 7 Location of Your Office
Is this a branch or subsidiary office? ☐ Yes ☐ No
If yes where is the head (main) office located
8. Working in another country Have you, in the last 12 months, seriously considered working in another European country?
☐ Yes ☐ No
What are your main concerns about working in another European country? Please tick all that apply
☐ unable to find work
☐ insufficient language skills
☐ insufficient knowledge of planning/building regulations
☐ architectural qualification issues
☐ practical, relocation or personal issues

YOUR INCOME

- 9 Your currency Please specify the currency which you use.

please use this currency for the rest of your answers in this survey
- 10 Annual Salaried Earnings If you were receiving a salary on 01.05.2012, please tell us your gross (pre-tax) salaried income in the box below (currency as stated above)
 ?
ie this was my annual remuneration (ie salary, bonuses, dividends, profit share), excluding benefits, at 01.05.2012 (currency stated as above)
- 11 Annual Non-Salaried Earnings If you were a Sole Principal or Partner in Private Practice on 01.05.2012, please tell us your gross (pre-tax) non-salaried income in the box below
 ?
ie this was my share from your business profit (ie its total Revenue less employee salaries and overheads) for the year ending 01.05.2012 (currency as stated above)

CONTINUING PROFESSIONAL DEVELOPMENT - CPD

12 CPD

How many hours of CPD do you currently undertake per year?

hours per year

How much does this CPD cost you **personally**? Please *exclude* costs which are paid by your employer or your business.

per year (currency as stated above)

YOUR CAREER

13 Your career

How satisfied are you with the following aspects of being an architect?

Please select from the scale below where 0 shows complete dissatisfaction with your career and 10 shows complete satisfaction.

←Less satisfied

More satisfied→

Your choice of career as an Architect

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

The amount you are paid

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Your quality of life

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

The business environment in which you work – including your colleagues, your fellow professionals, public planning bodies etc

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

14 Retirement

At what age do you expect to retire?

Please select from the following options ▼

Do you expect to work as an Architect until your retire?

Please select from the following options ▼

15 Professional Reputation

In *your* opinion, how well are Architects regarded in your country by the following groups?

	very poorly	quite poorly	neutral	quite highly	very highly
your clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the general public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16 Future Workloads

How do you anticipate your practice's workloads will change in the next 12 months?

☐ decrease ☐ no change ☐ increase

YOUR MAIN BUSINESS

17 Your main business

What percentage of your business do you own? % ?

Under what type of formation is your business organised?

Please select from the following options ▼

18 Associations

Do you have a *formal* association with another architectural practice?

Please select from the following options ▼

19 Your staff

Please state the number and type of staff, including **yourself** – full time equivalent – working in your practice on **01.05.2012**. Please include staff in **ALL** offices. ?

Principals, Partners, Directors

Associates

Salaried Architects

Other professional staff - who are not architects

Technical Staff

Support / admin staff

20 Charging for your services

What number of your **ongoing** jobs have fees calculated using the following methods?

Percentage of construction contract value %
 Fee agreed after an estimate of time required %
 Hourly charge %
 No fee agreed yet %

21 Hourly rates

What is the typical rate at which you charge-out the following types of staff:

Please enter as at **01.05.2012** (currency as stated above)

Principals, Partners, Directors (not associates) per hour
 Architects per hour
 Technical Staff per hour

22 Your Revenue

What was the total Revenue earned by your business before tax in your latest accounting year or the calendar year 2011? (currency as stated above)

Total Revenue

What percentage, if any, of your total Revenue came from work on projects based outside your country?

% of revenue outside your country

Please estimate the **percentage** of the total Revenue received from each of the following:

sector of work

individual houses %
 other private housing %
 offices %
 retail %
 leisure and the arts %
 industrial %
 health %
 education %

23 Costs & Profits

Please estimate the following (Please use the currency you specified previously)

Total Revenue as stated in question 22
 Total expenditure (costs)
 Profit before tax
 Profit after tax

Please give an estimated breakdown of your business expenditure/costs as follows:

rent
 utilities (gas, electric etc)
 staffing costs
 travel & motor
 bank & interest charges
 insurance
 legal and accounting
 promotional activities
 Continuing Professional Development (CPD)
 other costs

ENERGY EFFICIENCY

24

To what extent do you **agree** with the following statement:

Energy efficiency is a key driver in the design of buildings today

Agree strongly

☐

Agree slightly

☐

Disagree slightly

☐

Disagree strongly

☐

NEARLY ZERO ENERGY BUILDINGS

25

To what extent do you feel **competent** to design a nearly zero energy building?

Very competent

☐

Competent

☐

Not very competent

☐

Not at all competent

☐

26

To what extent are you **currently** being asked to build to Nearly Zero Energy standards by your clients or through regulation?

☐ 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

THANK YOU VERY MUCH FOR YOUR HELP WITH THIS SURVEY.

[PLEASE CLICK HERE TO SUBMIT YOUR DATA](#)



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The Architectural Profession in Europe

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Architects' Survey

YOURSELF

Please describe yourself at 01.05.2012

- 1 Gender
- 2 Age
- 3 For how many years have you been working as an Architect
- 4 Employment Status ?

YOUR WORK

Please describe your work at 01.05.2012

- 5 Working Hours
- How many hours per week does your contract state you **should** work? (Please exclude lunch, overtime, breaks)
- hours per week
- How many hours, on average, do you **actually** work per week?
- hours per week

- 6 Your Main Field of Employment
- If you have selected 'Other Private' or 'Other Public' you may give details below
-

YOUR WORKPLACE

Please describe your workplace at 01.05.2012

- 7 Location of Your Office
- Is this a branch or subsidiary office? ☐ Yes ☐ No
- If yes where is the head (main) office located
-
- 8 Working in another country
- Have you, in the last 12 months, seriously considered working in another European country?
- ☐ Yes ☐ No
- What are your main concerns about working in another European country? Please tick all that apply
- ☐ unable to find work
- ☐ insufficient language skills
- ☐ insufficient knowledge of planning/building regulations
- ☐ architectural qualification issues
- ☐ practical, relocation or personal issues
- 9 Number of Technical Staff in your Organisation
- Please indicate the number of technical staff - full time equivalent - including yourself, working in your organisation on 01.05.2012
- ?

YOUR INCOME

- 10 Your currency
- Please specify the currency which you use.
-
- please use this currency for the rest of your answers in this survey
- 11 Annual Salaried Earnings
- If you were receiving a salary on 01.05.2012, please tell us your gross (pre-tax) salaried income in the box below (currency as stated above)
- ?
- ie this was my annual remuneration (ie salary, bonuses, dividends, profit share), excluding benefits, at 01.05.2012 (currency stated as above)

CONTINUING PROFESSIONAL DEVELOPMENT - CPD

12 CPD

How many hours of CPD do you currently undertake per year?

hours per year

How much does this CPD cost you **personally**? Please *exclude* costs which are paid by your employer or your business.

per year (currency as stated above)

YOUR CAREER

13 Your career

How satisfied are you with the following aspects of being an architect?

Please select from the scale below where 0 shows complete dissatisfaction with your career and 10 shows complete satisfaction?

←Less satisfied More satisfied→

Your choice of career as an Architect

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

The amount you are paid

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Your quality of life

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

The business environment in which you work – including your colleagues, your fellow professionals, public planning bodies etc

0 1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

14 Retirement

At what age do you expect to retire?

Please select from the following options ▼

Do you expect to work as an Architect until your retire?

Please select from the following options ▼

15 Professional Reputation

In your opinion, how well are Architects regarded in your country by the following groups?

	very poorly	quite poorly	neutral	quite highly	very highly
your clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
the general public	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ENERGY EFFICIENCY

16

To what extent do you **agree** with the following statement:

Energy efficiency is a key driver in the design of buildings today

Agree strongly Agree slightly Disagree slightly Disagree strongly
☐ ☐ ☐ ☐

17

To what extent do you feel **competent** to design a nearly zero energy building?

Very competent Competent Not very competent Not at all competent
☐ ☐ ☐ ☐

18

To what extent are you **currently** being asked to build to Nearly Zero Energy standards by your clients or through regulation?

- ☐ 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

THANK YOU VERY MUCH FOR YOUR HELP WITH THIS SURVEY.

PLEASE CLICK HERE TO SUBMIT YOUR DATA

The Architectural Profession in Europe 2012

- A Sector Study Commissioned by the
Architects' Council of Europe

December 2012

The Architectural Profession in Europe 2012

- A Sector Study Commissioned by the
Architects' Council of Europe

PART ONE

FINAL
21 December 2012



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

The Architectural Profession in Europe 2012

- A Sector Study Commissioned by the
Architects' Council of Europe

PART TWO -
COUNTRY FACTSHEETS

FINAL
21 December 2012

La profession d'architecte en Europe

Les informations que vous fournirez seront enregistrées de manière anonyme : aucun lien ne sera fait entre une personne et les réponses.

L'enquête ne vous prendra que 10 à 15 minutes de votre temps pour compléter le questionnaire.

Un questionnaire partiellement complété peut être transmis à tout moment, mais il n'est pas possible de le sauvegarder en vue de le compléter ultérieurement.

Enquête Cadre dirigeant (Bureau d'architecture)

VOUS-MÊME

Veillez vous décrire à la date du **01.05.2012**

1 Sexe

Veillez sélectionner une option ▼

2 Age

Veillez sélectionner parmi les options suivantes ▼

3 Depuis combien d'années exercez vous une activité en tant qu'architecte

Veillez sélectionner parmi les options suivantes ▼

4 Votre statut

Veillez sélectionner une option ▼ ?

VOTRE ACTIVITE

Veillez décrire votre activité à la date du **01.05.2012**

5 Heures de travail

Combien d'heures travaillez-vous par semaine ?

heures par semaine

6 Principal domaine d'emploi

Veillez sélectionner parmi les options suivantes ▼

Si vous avez sélectionné 'Autres privé' ou 'Autres secteur public' merci de spécifier ci-dessous

VOTRE LIEU DE TRAVAIL

Veillez décrire votre lieu de travail à la date du **01.05.2012**

7 Lieu de votre activité

Veillez sélectionner parmi les options suivantes ▼

S'agit-il d'une succursale ou d'une filiale ? ☐ Oui ☐ Non

Si oui, où est situé le siège principal ?

Veillez sélectionner parmi les options suivantes ▼

8 Travailler dans un autre pays

Avez vous, au cours des douze derniers mois, sérieusement envisagé de travailler dans un autre pays européen ?

☐ oui ☐ non

Quelles sont les principales barrières qui vous empêcheraient de travailler dans un autre pays européen? Veuillez cocher toutes les cases que vous désirez

- ☐ incapable de trouver un travail
- ☐ compétences linguistiques insuffisantes
- ☐ connaissance insuffisante des réglementations urbanistiques et/ou de la construction
- ☐ problème de reconnaissance de votre qualification d'architecte
- ☐ questions pratiques, de relocalisation ou personnelles

VOS REVENUS

9 Votre monnaie

Veillez préciser la devise que vous utilisez

Veillez sélectionner parmi les options suivantes ▼

Veillez utiliser cette devise dans le reste de vos réponses dans ce questionnaire

10 Revenu salarial annuel

Si vous perceviez un salaire au **01.05.2012**, merci de nous communiquer votre salaire brut (avant imposition) dans la case ci-dessous (dans la devise reprise ci-dessus)

?

Ceci est ma rémunération annuelle (salaire, bonus, dividendes, part des bénéfices) non compris les avantages en nature au **01.05.2012**



11 Revenus annuel non salarié

Si vous étiez dirigeant unique ou partenaire dans un bureau privé au 01.05.2012, veuillez indiquer votre revenu annuel brut (avant imposition) dans la case ci-dessous



Ceci était ma part de bénéfice de la société (c'est-à-dire mon revenu global moins les salaires et charges et les frais généraux) pour l'année se terminant le 01.05.12

FORMATION PROFESSIONNELLE CONTINUE (FPC)

12 FPC

Combien d'heures de FPC avez-vous effectué cette année?

 heures par an

Combien vous coûte personnellement cette FPC? Merci d'exclure les coûts qui sont payés par votre employeur ou par votre entreprise

 par an (même devise que ci-dessus)

VOTRE CARRIÈRE

13 Votre carrière

Parmi les aspects repris ci-dessous quel est votre degré de satisfaction d'être un architecte ?

Merci de sélectionner une case où 0 signifie que vous êtes entièrement insatisfait de votre carrière et où 10 indique que vous êtes entièrement satisfait.

← Moins satisfait

Plus satisfait →

Votre choix de carrière en tant qu'architecte

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Le montant de votre rémunération

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Votre qualité de vie

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

L'environnement de travail dans lequel vous évoluez – y compris vos relations avec vos collègues, partenaires professionnels, les organes de l'administration en charge de l'urbanisme, etc

L'environnement de travail dans lequel vous évoluez – y compris vos relations avec vos collègues, partenaires professionnels, les organes de l'administration en charge de l'urbanisme, etc

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

14 Retraite

A quel âge comptez vous prendre votre retraite ?

Pensez vous que vous allez travailler en tant qu'architecte jusqu'à votre retraite ?

15 Réputation professionnelle

Selon vous, comment sont considérés les architectes dans votre pays par les groupes suivants ?

	<i>très mal</i>	<i>assez mal</i>	<i>neutre</i>	<i>bien</i>	<i>très bien</i>
Vos clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Le public en général	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16 Futur volume d'activité

Comment prévoyez vous l'évolution de votre charge de travail va dans les 12 prochains mois ?

☐ diminution ☐ pas de changement ☐ augmentation

VOTRE ACTIVITE PRINCIPALE

17 Votre activité principale

Quel pourcentage de votre agence possédez-vous ? %

Sous quel forme votre agence est-elle organisée ?

18 Associations

Avez-vous une association formelle avec un autre bureau d'architecture ?

19 Votre personnel

Veillez indiquer le nombre et le type de personnel, y compris vous-même, travaillant dans votre agence en équivalent plein temps au 01.05.12. Veillez inclure le personnel de **TOUS** les bureaux.



Dirigeant unique, Partenaire/dirigeant	<input type="text"/>
Associés	<input type="text"/>
Architectes salariés	<input type="text"/>
Autre personnel employé – qui ne sont pas des architectes	<input type="text"/>
Personnel technique – qui ont une formation formellement reconnue dans l'industrie du bâtiment	<input type="text"/>
Support / personnel administratif	<input type="text"/>

20 Prix de vos services

Quel est le pourcentage de vos travaux en cours dont les honoraires sont calculés selon les méthodes suivantes ?

Pourcentage de la valeur du contrat de construction	<input type="text"/>	%
Honoraires décidés sur base d'une estimation du temps passé	<input type="text"/>	%
Tarif horaire	<input type="text"/>	%
Pas encore de prix décidé	<input type="text"/>	%

21 Tarif horaire

Quel est le tarif type que vous facturez pour le type de personnel suivant: Veillez compléter le tarif au 01.05.12 (utilisez la devise que vous avez indiquée précédemment)

Dirigeants, Partenaires, Directeurs (non associés)	<input type="text"/>	par heure
Architectes	<input type="text"/>	par heure
Personnel technique	<input type="text"/>	par heure

22 Vos revenus

Quel est le revenu total de votre agence avant imposition lors de la dernière année comptable ou lors de l'année calendaire 2011? (utilisez la devise que vous avez indiquée précédemment)

Revenu total	<input type="text"/>
--------------	----------------------

Quel pourcentage de votre revenu provient de travaux concernant des projets situés en dehors de votre pays, le cas échéant ?

% de votre revenue hors de votre pays	<input type="text"/>	%
---------------------------------------	----------------------	---

Veillez estimer le pourcentage du revenu total comme suit :

secteur d'activité

maison individuelle	<input type="text"/>	%
autre logement privé	<input type="text"/>	%
bureau	<input type="text"/>	%
commerce/distribution	<input type="text"/>	%
loisir et arts	<input type="text"/>	%
industrie	<input type="text"/>	%
santé	<input type="text"/>	%
enseignement	<input type="text"/>	%
logement public	<input type="text"/>	%
autre privé	<input type="text"/>	%
autre public	<input type="text"/>	%
TOTAL	100	%

type de client

individuel (par exemple propriétaire de maison)	<input type="text"/>	%
promoteur immobilier	<input type="text"/>	%
société anonyme	<input type="text"/>	%
groupe d'entreprises	<input type="text"/>	%
gouvernement central	<input type="text"/>	%
gouvernement local	<input type="text"/>	%
autre institution publique	<input type="text"/>	%
autres	<input type="text"/>	%
TOTAL	100	%

type de services

conception de bâtiment	<input type="text"/>	%
architecture paysagiste	<input type="text"/>	%
architecture d'intérieur	<input type="text"/>	%
etude de faisabilité	<input type="text"/>	%
gestion de projet	<input type="text"/>	%
conception urbaine / urbanisme	<input type="text"/>	%
autres services	<input type="text"/>	%
TOTAL	100	%

23 Coûts et profits

Pour les éléments ci-dessous veuillez estimer

Le revenu total	<input type="text"/>	tel que défini à la question 22
Le total des dépenses (coûts)	<input type="text"/>	
Le bénéfice avant impôt	<input type="text"/>	
Le bénéfice après impôt	<input type="text"/>	

Veuillez donner une estimation de la répartition de vos dépenses, telles que:

location	<input type="text"/>
services (gaz, électricité, etc.)	<input type="text"/>
coûts de personnel	<input type="text"/>
voyages et déplacements	<input type="text"/>
charge et intérêt bancaires	<input type="text"/>
assurances	<input type="text"/>
juridique et comptabilité	<input type="text"/>
activités de promotion	<input type="text"/>
formation professionnelle continue FPC	<input type="text"/>
autres coûts	<input type="text"/>

EFFICACITE ENERGETIQUE

24

Dans quelle mesure êtes vous d'accord avec les affirmations suivantes :

L'efficacité énergétique est aujourd'hui un élément clé dans la conception des bâtiments.

<i>Fortement d'accord</i>	<i>Légèrement d'accord</i>	<i>Légèrement en désaccord</i>	<i>Fortement en désaccord</i>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BÂTIMENTS DONT LA CONSOMMATION D'ENERGIE EST QUASI NULLE

25

A quel point vous considérez-vous comme compétent pour concevoir un bâtiment dont la consommation d'énergie est quasi nulle?

<i>Très compétent</i>	<i>Compétent</i>	<i>Pas très compétent</i>	<i>Pas compétent du tout</i>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

26

Dans quelles mesures êtes-vous sollicité actuellement pour bâtir aux normes de consommation énergie quasi-nulle par vos clients ou à travers une réglementation ?

- ☐ Moins de 10 % du temps
- ☐ Entre 10 et 25% du temps
- ☐ Entre 26 et 50% du temps
- ☐ Entre 51 et 99% du temps
- ☐ Toujours

MERCI BEAUCOUP POUR VOTRE AIDE

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La profession d'architecte en Europe

Les informations que vous fournirez seront enregistrées de manière anonyme : aucun lien ne sera fait entre une personne et les réponses.

L'enquête ne vous prendra que 10 minutes de votre temps pour compléter le questionnaire.

Un questionnaire partiellement complété peut être transmis à tout moment, mais il n'est pas possible de le sauvegarder en vue de le compléter ultérieurement.

Enquête architectes

VOUS-MÊME

Veuillez vous décrire à la date du 01.05.2012

- 1 Sexe
- 2 Age
- 3 Depuis combien d'années exercez vous une activité en tant qu'architecte
- 4 Votre statut ?

VOTRE ACTIVITE

Veuillez décrire votre activité à la date du 01.05.2012

- 5 Heures de travail

Combien d'heures de travail votre contrat de travail stipule-t-il ? (Merci d'y exclure les heures supplémentaires, le lunch, les pauses)

 Heures par semaine

Combien d'heures, en moyenne, travaillez vous effectivement par semaine ?

 Heures par semaine
- 6 Principal domaine d'emploi

Si vous avez sélectionné 'Autres privé' ou 'Autres secteur public' merci de spécifier ci-dessous

Si vous avez sélectionné 'Autres privé' ou 'Autres secteur public' merci de spécifier ci-dessous

VOTRE LIEU DE TRAVAIL

Veuillez décrire votre lieu de travail à la date du 01.05.2012

- 7 Lieu de votre activité

S'agit-il d'une succursale ou d'une filiale ? ☐ Oui ☐ Non

Si oui, où est situé le siège principal ?
- 8 Travailler dans un autre pays

Avez vous, au cours des douze derniers mois, sérieusement envisagé de travailler dans un autre pays européen?

☐ oui ☐ non

Quelles sont les principales barrières qui vous empêcheraient de travailler dans un autre pays européen? Veuillez cocher toutes les cases que vous désirez

☐ incapable de trouver un travail
☐ compétences linguistiques insuffisantes
☐ connaissance insuffisante des réglementations urbanistiques et/ou de la construction
☐ problème de reconnaissance de votre qualification d'architecte
☐ questions pratiques, de relocalisation ou personnelles
- 9 Nombre de personnel technique dans votre agence

Veuillez indiquer le nombre de personnel technique, y compris vous-même, travaillant dans votre organisation en équivalent plein temps au 01.05.2012.

 ?

VOS REVENUS

- 10 Votre monnaie

Veuillez préciser la devise que vous utilisez

Veuillez utiliser cette devise dans le reste de vos réponses dans ce questionnaire

11 Revenu salarial annuel

Si vous perceviez un salaire au 01.05.2012, merci de nous communiquer votre salaire brut (avant imposition) dans la case ci-dessous (dans la devise reprise ci-dessus)



Ceci est ma rémunération annuelle (salaire, bonus, dividendes, part des bénéfices) non compris les avantages en nature au 01.05.2012

FORMATION PROFESSIONNELLE CONTINUE (FPC)

12 FPC

Combien d'heures de FPC avez-vous effectué cette année?

 heures par an

Combien vous coûte personnellement cette FPC? Merci d'exclure les coûts qui sont payés par votre employeur ou par votre entreprise

 par an (même devise que ci-dessus)

VOTRE CARRIÈRE

13 Votre carrière

Parmi les aspects repris ci-dessous quel est votre degré de satisfaction d'être un architecte ?

Merci de sélectionner une case où 0 signifie que vous êtes entièrement insatisfait de votre carrière et où 10 indique que vous êtes entièrement satisfait.

← Moins satisfait

Plus satisfait →

Votre choix de carrière en tant qu'architecte

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Le montant de votre rémunération

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Votre qualité de vie

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

L'environnement de travail dans lequel vous évoluez – y compris vos relations avec vos collègues, partenaires professionnels, les organes de l'administration en charge de l'urbanisme, etc

L'environnement de travail dans lequel vous évoluez – y compris vos relations avec vos collègues, partenaires professionnels, les organes de l'administration en charge de l'urbanisme, etc

0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

14 Retraite

A quel âge comptez vous prendre votre retraite ?

 Veuillez sélectionner parmi les options suivantes ▼

Pensez vous que vous allez travailler en tant qu'architecte jusqu'à votre retraite ?

 Veuillez sélectionner parmi les options suivantes ▼

15 Réputation professionnelle

Selon vous, comment sont considérés les architectes dans votre pays par les groupes suivants ?

	<i>très mal</i>	<i>assez mal</i>	<i>neutre</i>	<i>bien</i>	<i>très bien</i>
Vos clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Le public en général	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

EFFICACITE ENERGETIQUE

16

Dans quelle mesure êtes-vous d'accord avec les affirmations suivantes :

L'efficacité énergétique est aujourd'hui un élément clé dans la conception des bâtiments.

Fortement d'accord

Légèrement d'accord

Légèrement en désaccord

Fortement en désaccord



BÂTIMENTS DONT LA CONSOMMATION D'ENERGIE EST QUASI NULLE

17

A quel point vous considérez-vous comme compétent pour concevoir un bâtiment dont la consommation d'énergie est quasi nulle?

Très compétent

Compétent

Pas très compétent

Pas compétent du tout



18

Dans quelles mesures êtes-vous sollicité actuellement pour bâtir aux normes de consommation énergie quasi-nulle par vos clients ou à travers une réglementation ?

☐ Moins de 10 % du temps

☐ Entre 10 et 25% du temps

☐ Entre 26 et 50% du temps

☐ Entre 51 et 99% du temps

☐ Toujours

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