



Mirza & Nacey Research

The Architectural Profession in Europe

FINAL
18 December 2008



FINAL

The Architectural Profession in Europe

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survey background

Introduction & Survey Methodology

Phase I of this research was conducted by the ACE in 2007. The method was to gather information by way of a written questionnaire sent to Member Organisations. Twenty countries took part. A further ‘interim phase’ of this research was conducted subsequently at end 2007 – early 2008 amongst these twenty participants, of whom 13 responded.

A very large volume of background information has been collected. The results of the questionnaire research conducted directly with the Member Organisations were presented in an internal document to the ACE. The results are very useful and much of the raw data has been used to ‘inform’ and check against the statistics gathered in Phase II. Our observation

TABLE A-1
On-line survey response (Phase II)

	respondents to architect survey	respondents to principal survey	total number of replies	total contacted by email	response rate, %
Austria	0	160	160	526	30
Belgium	96	222	318	2101	15
Denmark	130	29	159	850	19
Estonia	8	17	25	70	36
Finland	146	57	203	344	59
France	30	112	142	1500	9
Germany	1375	2085	3460	12000	29
Greece	147	247	394	1700	23
Ireland	78	69	147	410	36
Luxembourg	14	61	75	543	14
Malta	61	34	95	400	24
Netherlands	27	91	118	1167	10
Romania	202	405	607	3070	20
Slovenia	42	54	96	688	14
Sweden	267	96	363	1188	31
Turkey	893	701	1594	15981	10
United Kingdom	92	35	127	1450	9
EUROPE - 17	3608	4475	8083	43988	18

is that the responses to the Phase I questionnaire are in many cases unclear and need “cleaning”. Figures do not always add to 100 per cent, some figures are inconsistent, and there is an issue in the interpretation of the questions. The research appears to have been assembled by many different individuals who may have made various different assumptions and have different understandings about what has been asked.

To move this project on we proposed an ambitious research survey. We felt the ACE was seeking data which simply did not exist in many countries. So rather than continue to approach Member Organisations for information they might only be able to guess at, our approach was to gather this information directly from architects.

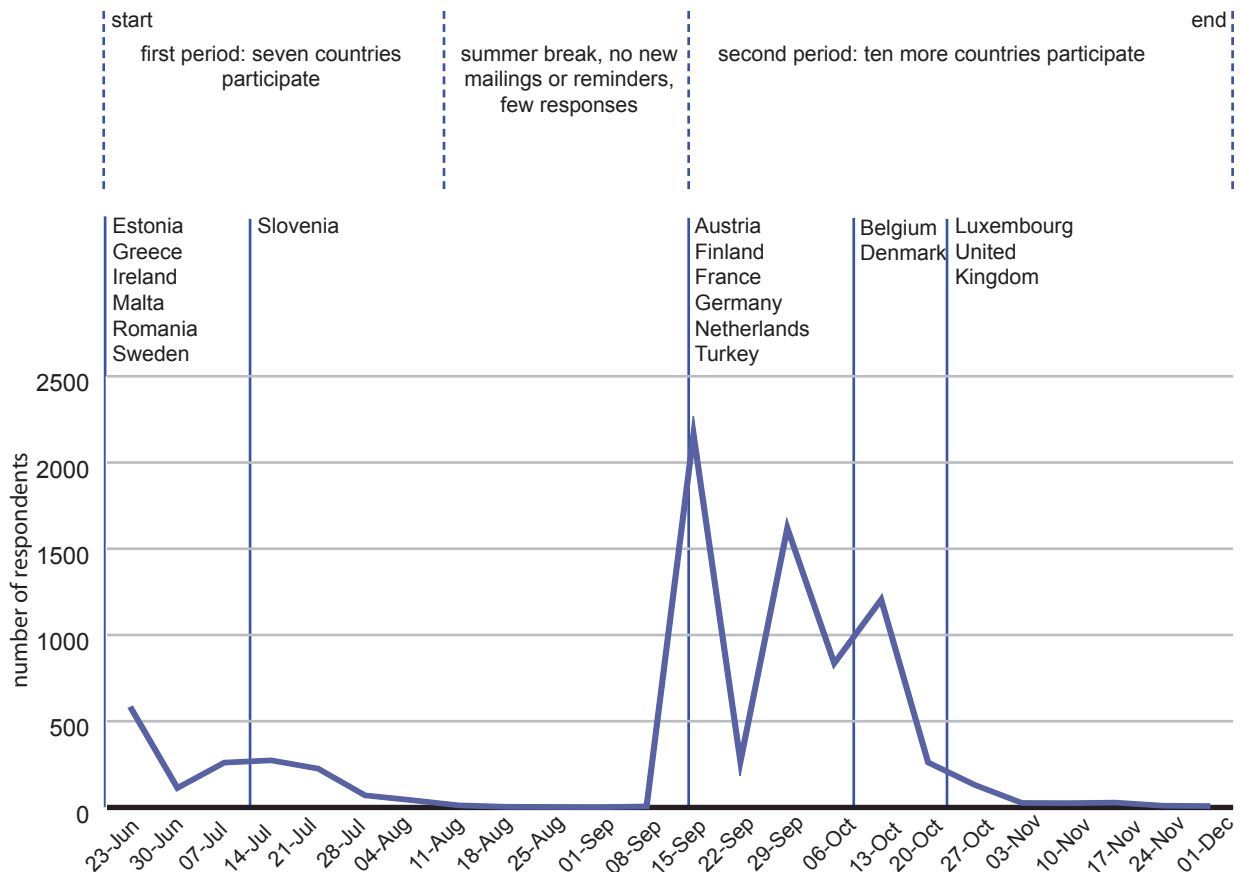
The results of Phase II therefore are based on an on-line questionnaire survey, which was conducted in five languages amongst the architect members of seventeen ACE Member Organisations. At least

one Member Organisation in each of the 32 ACE countries was invited to participate.

The methodology was as follows:

1. Member Organisations were asked to select a sample of their architect members – generally one in five of members for whom an email address was available. Organisations with small numbers of architects were asked to select one in two architects.
2. Member Organisations constructed and sent out to the sample 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 five different languages. The information they provided was submitted

CHART A-1
On-line survey (Phase II) timetable and when countries joined the survey



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.

The fieldwork stage of this research was undertaken in two periods, either side of the summer holiday. The first Member Organisations began sending out emails in June 2008; most of whom had completed the two reminders by July. The remaining countries began their mail-out in September and October 2008, with all countries having completed their reminders by November. The UK Member Organisation was only able to send out one email to its Members so no reminders were sent.

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 17 Member Organisations have provided. A number of

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	8
Belgium	5
Denmark	8
Estonia	19
Finland	7
France	8
Germany	2
Greece	5
Ireland	8
Luxembourg	11
Malta	9
Netherlands	9
Romania	4
Slovenia	10
Sweden	5
Turkey	2
United Kingdom	9
EUROPE - 17	1

* 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

CHART A-2

Countries participating in the on-line survey (Phase II)



NB: Malta has been enlarged on all maps to aid visibility - it is not to scale

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 8,083 architects replied. The overall response rate is 18 per cent, and both figures are well above expectations. Turkey and Germany sent out the largest number of survey invitations and produced the largest numbers of respondents; over half of all respondents came from these two countries. Countries with very high response rates are Finland (59 per cent); Estonia (36 per cent); Ireland (36 per cent); Austria (30 per cent) and Sweden (31 per cent). In these, and several other countries, the response rates are outstanding. Only in the Netherlands, UK and France were response rates around 10 per cent, possibly due in part to questionnaire fatigue. (The UK was unable to send out any 'reminder' emails)

The response is considered satisfactory for the level of analysis undertaken. The statistical validity of these results is tabulated left; overall, the results are accurate to within ± 1 per cent at the 95 per cent confidence level. The accuracy varies for each individual country and these \pm levels should be regarded very carefully when making comparisons between countries.

We are most grateful to the Member Organisations who helped with this research. Without them nothing could have been achieved; their willingness and enthusiasm to support this research was remarkable.

We are furthermore extremely grateful to the thousands of architects who participated in this survey. The on-line questionnaire did ask for a lot of information, and we were originally concerned we might dampen response by asking for too much. The fact that over 8,000 architects participated, most of whom completed all sections of the questionnaire, is remarkable and again displays an enthusiasm within the profession for this study. The huge response to this survey is well beyond our expectations, and ensures the results have statistical significance.

Definitions

Architects

Persons who are professionally and academically qualified and generally registered / licensed / certified to practice architecture in the jurisdiction in which he or she resides 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 practitioners, partnerships, and limited companies.

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. Include architects who are retired and who are unemployed.

Freelance Architect

An architect who contracts his/her services to an architectural practice or organisation.

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 17' totals are accurate to within plus or minus 1 per cent, at the 95% Confidence Level. This means that, for example, the proportion of architects who are women is quoted as being 37 per cent, but we can be 95% certain that the "true" figure lies between 36 and 38 per cent. Accuracy of results for each country differs. Taking Sweden as an example, its results are accurate to within ± 5 %. The quoted figure (table 1-4) is 51 per cent of architects are women, the 'true' proportion of women architects in Sweden lies between 46 and 56 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 the way up and the Upper Quartile is the value three quarters the way up this list of data.



Summary

number of countries in Sector Study: **32 = “Europe - 32”**

number of countries participated in on-line survey: **17 = “Europe - 17”**

number of countries that provided relevant national surveys: **3**

total number of respondents to on-line survey: **8083**

response rate: **18 per cent**

estimated number of architects in Europe - 32: **483,000**

estimated number of architects in Europe - 17: **255,850**

estimated size of construction industry in Europe - 32: **€1,650 billion**

estimated size of architectural market in Europe - 32: **€22 billion**

number of architectural practices in Europe - 17: **69,800**

average earnings of architects: **€36,686**

per cent women architects: **37 per cent**

per cent economically active (working full or part-time): **84 per cent**

of whom: per cent Freelance architects: **9 per cent**

per cent Sole Principals: **24 per cent**

per cent architects aged under 40: **42 per cent**

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

per cent architects aged 55 and over: **18 per cent**

per cent working or resident in the same country as they are registered: **93 per cent**

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

by the general public: **37 per cent**

by fellow professionals: **53 per cent**

Summary: Top Five Countries

Largest number of architects

Italy	123,000
Germany	95,000
Spain	45,000
Turkey	32,000
UK	32,000

Note: Italy and Spain did not participate in this survey but did provide relevant national surveys* that allowed the research team to include information on these countries in this section only of the report

Highest proportion male architects

Netherlands	86%
Austria	85%
Estonia	84%
Malta	81%
UK	79%

Highest proportion female architects

France	56%
Greece	52%
Sweden	51%
Finland	50%
Denmark	49%

Highest average earnings

Ireland	€65,000
Netherlands	€54,000
Denmark	€53,720
Luxembourg	€50,000
UK	€49,650

Highest proportion of architects working outside own country

Ireland	18%
Malta	14%
Austria	13%
Luxembourg	11%
France	8%

Largest architectural market

Italy	€5700m
Germany	€4000m
UK	€2800m
France	€1100m
Turkey	€700m

Highest level of satisfaction (Quality of Life rating, 1 to 10)

Denmark	7.9
Sweden	7.8
Netherlands	7.7
Finland	7.5
Ireland	6.7

* Sources:

CRESME / CNAPPC, 2008, Il mercato della progettazione architettonica in italia, p. 82

Cabral et al, Lisbon University for Portuguese Order of Architects, 2006, Profession Report, Architect.

Consejo Superior de los Colegios de Arquitectos de Espan / Fundacion caja de arquitectos, 2007, Informe Arquitectos 2007



Architects in Europe



The Sector Study was aimed at 32 countries:

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

Comparing the number of architects with the general population is another way of examining country variations. There are approximately 0.8 architects per 1000 of Europe's population. The highest 'density' of architects occurs in Italy (2.1 architects per 1000 population), FYROM and Portugal.

The lowest 'density' of architects is recorded in Eastern Europe – Slovakia, Latvia, Czech Republic and Romania, each recording 0.3 or fewer architects per 1000 population.

The range in the 'density' statistic across Europe is huge; in Italy there is one architect for every 485 people while in Slovakia the ratios nearly ten times lower at one architect for every 4155 people.

In this report, when data refers to all of these countries it is labelled 'EUROPE - 32'.

Seventeen of these countries participated in the on-line survey. Totals for all survey country participants are labelled 'EUROPE - 17'.

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	3,800	8,331,930	0.5
Belgium	11,500	10,666,866	1.1
Bulgaria	3,500	7,640,238	0.5
Croatia	3,000	4,435,383	0.7
Cyprus	430	794,580	0.5
Czech Republic	3,000	10,381,130	0.3
Denmark	7,000	5,475,791	1.3
Estonia	700	1,340,935	0.5
Finland	3,600	5,300,484	0.7
France	29,400	63,753,140	0.5
FYROM	3,000	2,045,177	1.5
Germany	95,000	82,221,808	1.2
Greece	15,000	11,214,992	1.3
Hungary	4,000	10,045,000	0.4
Ireland	3,500	4,419,859	0.8
Italy	123,000	59,618,114	2.1
Latvia	700	2,270,894	0.3
Lithuania	2,000	3,366,357	0.6
Luxembourg	600	483,799	1.2
Malta*	500	410,584	1.2
Netherlands	9,100	16,404,282	0.6
Norway	3,600	4,737,171	0.8
Poland	13,500	38,115,641	0.4
Portugal	16,300	10,617,575	1.5
Romania	5,500	21,528,627	0.3
Slovakia	1,300	5,400,998	0.2
Slovenia	1,350	2,025,866	0.7
Spain	45,000	45,283,259	1.0
Sweden	5,400	9,182,927	0.6
Switzerland	5,300	7,591,414	0.7
Turkey	32,300	70,586,256	0.5
United Kingdom	31,600	61,185,981	0.5
EUROPE - 32	483,480	586,877,058	0.8

Population source: Eurostat, population as at 1 January 2008, copyright (c) Eurostat

Architects source: Various sources, the starting point was 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. Further data was collected by ACE in Phase I of this research, we attempted to verify all figures using a mixture of primary and secondary sources including Member Organisations' websites, telephone / email. Very often different sources produced conflicting figures, sometimes substantially different. Final figures are our best estimates based on these several different sources. All figures are 'latest available'.

* Malta - the term Perit is used and the Perit carries out both architectural and building engineering design. This is why Malta has a high proportion of architects per 1000 population.



CHART 1-1
Number of architects per 1000 population

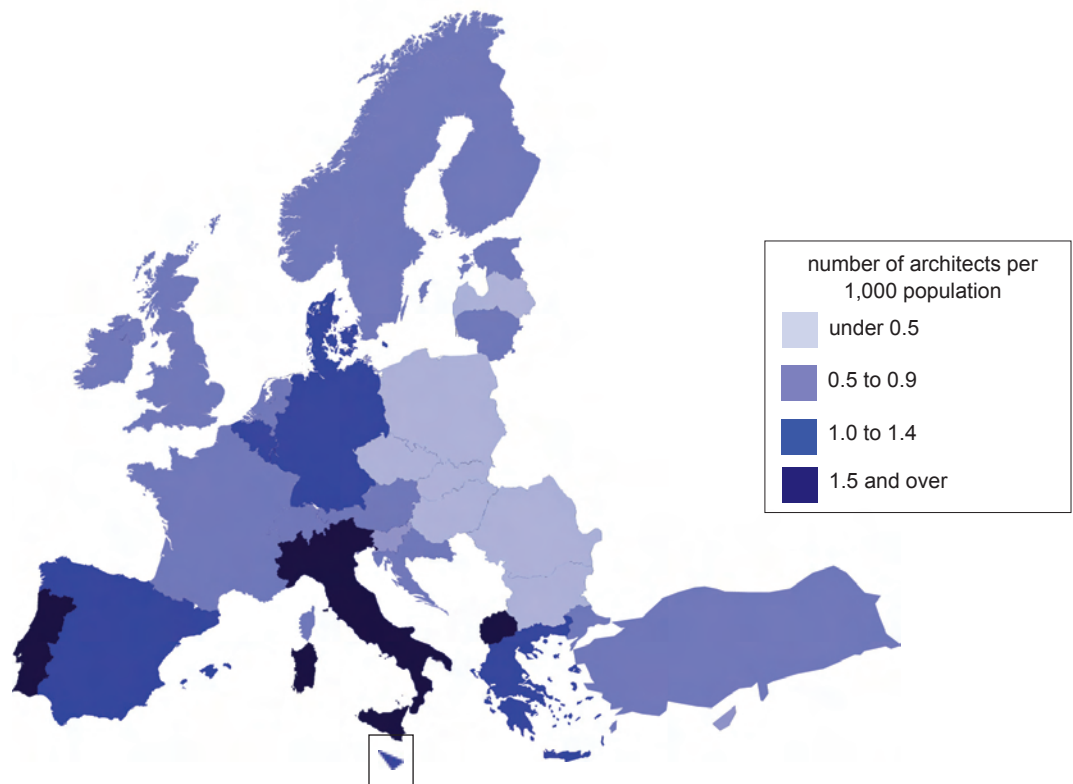
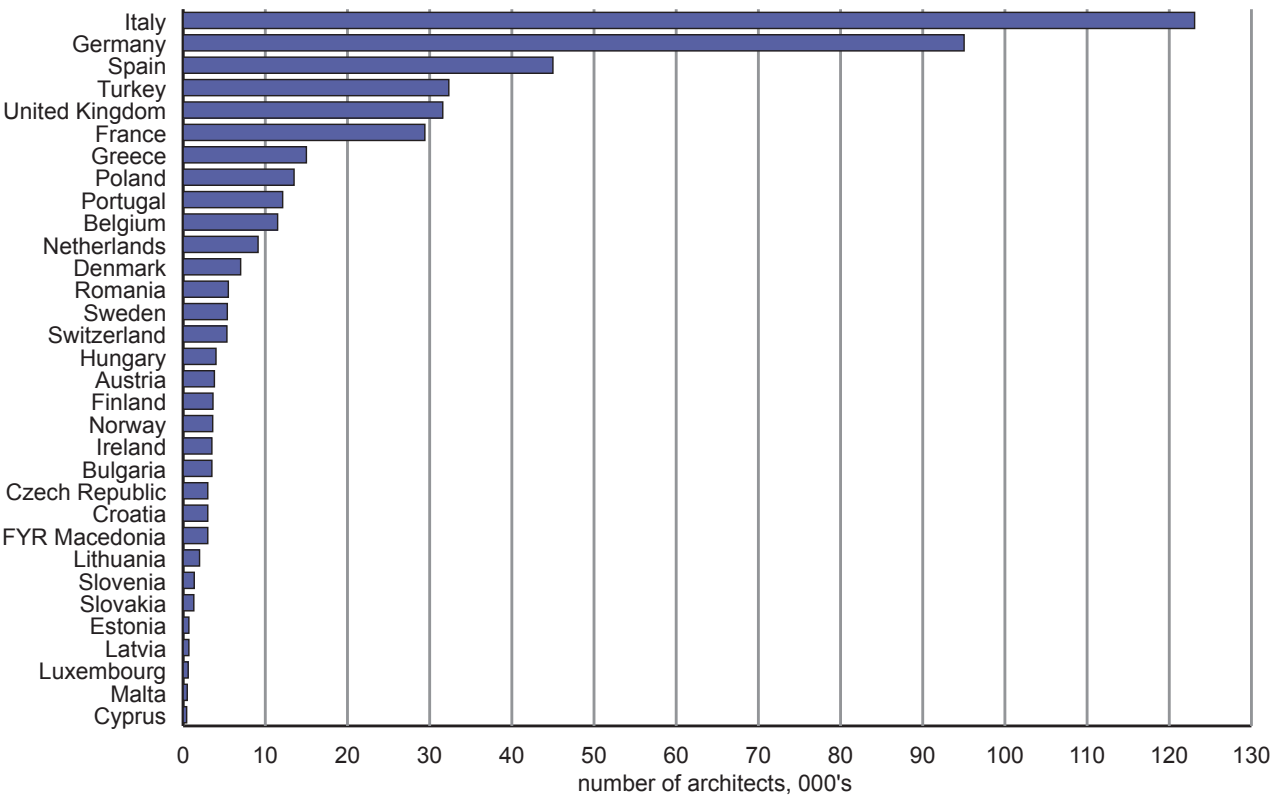


CHART 1-2
Estimated number of architects in each European country



Where architects work

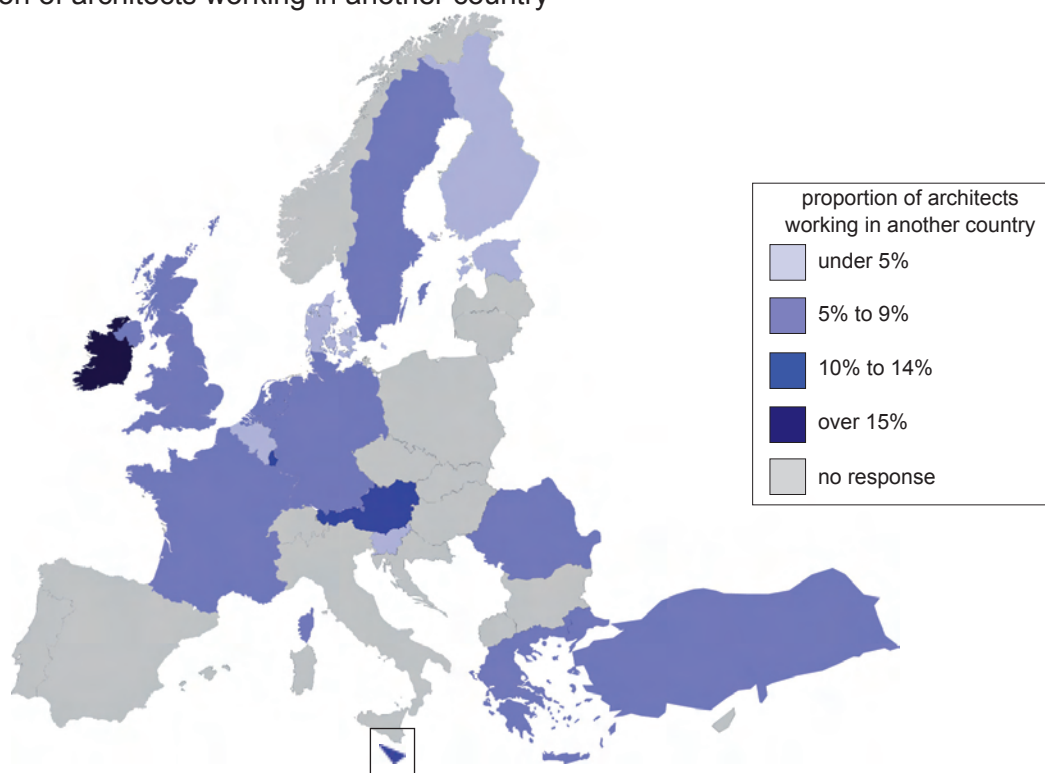
The vast majority – 93 per cent – of architects work or reside in the same country as they are registered in. The highest proportions of architects working / resident outside their ‘home’ country are in Ireland (18 per cent), Malta (14 per cent of architects work outside Malta), Austria (13 per cent)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

TABLE 1-2
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	12.5
Belgium	4.2
Denmark	3.3
Estonia	<1
Finland	<1
France	8.3
Germany	7.9
Greece	6.0
Ireland	18.2
Luxembourg	11.1
Malta	14.3
Netherlands	6.7
Romania	6.3
Slovenia	<1
Sweden	5.9
Turkey	6.4
United Kingdom	6.3
EUROPE - 17*	7.0

* EUROPE - 17 figure is a weighted average and takes account of the number of architects in each participating country

CHART 1-3
Proportion of architects working in another country



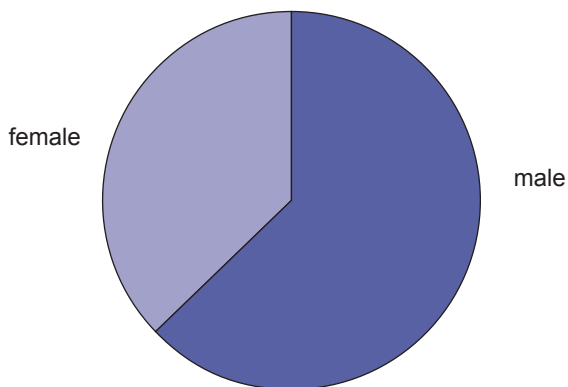
Profile of Architects

TABLE 1-3
Gender of architects analysed by country

per cent	gender of architects	
	male	female
Austria	85	15
Belgium	76	24
Denmark	51	49
Estonia	84	16
Finland	50	50
France	44	56
Germany	71	29
Greece	48	52
Ireland	77	23
Luxembourg	69	31
Malta	81	19
Netherlands	86	14
Romania	52	48
Slovenia	54	46
Sweden	49	51
Turkey	53	47
United Kingdom	79	21
EUROPE - 17 *	63	37

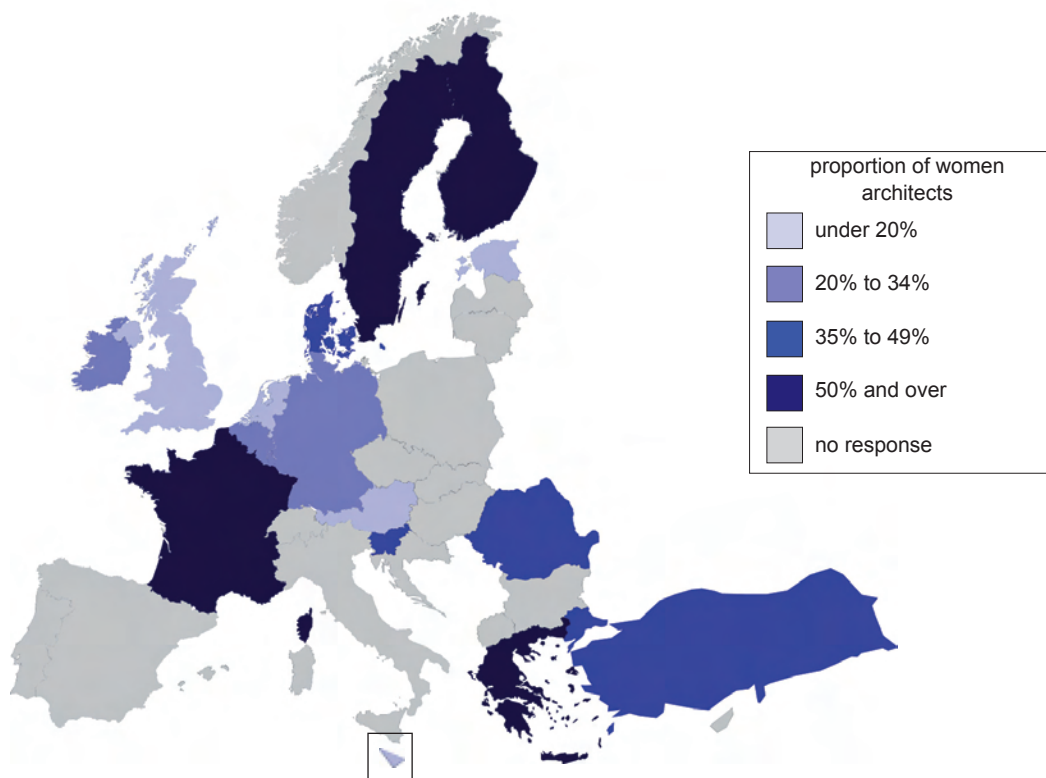
* weighted to reflect the total architectural population in all 17 countries. The weighting process is explained in the Appendix.

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



The male / female split across Europe averages at around one third female, two thirds male. In five countries the profession is predominantly male; 80 per cent or more of architects in Austria, Estonia, Malta and the Netherlands are male. However, in four countries women form the majority of the profession. Over 50 per cent of architects are female in Finland, France, Greece and Sweden; while in Denmark, Romania, Slovenia and Turkey over 45 per cent of architects are female.

CHART 1-5
Proportion of women architects

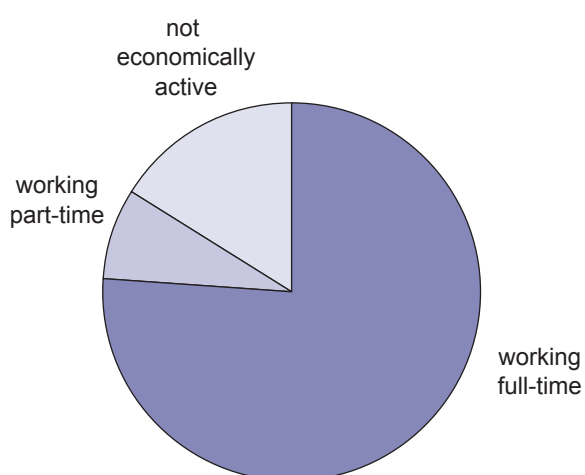


Employment Status

TABLE 1-4
Employment status of architects analysed by country

per cent	working full-time	working part-time	not economically active
Austria	66	3	31
Belgium	94	4	2
Denmark	74	11	15
Estonia	88	8	4
Finland	69	6	25
France	88	5	7
Germany	73	10	17
Greece	74	9	17
Ireland	88	10	3
Luxembourg	74	12	14
Malta	87	6	7
Netherlands	84	10	6
Romania	78	5	17
Slovenia	90	4	6
Sweden	75	10	15
Turkey	61	6	34
United Kingdom	87	4	9
EUROPE - 17	77	8	16

CHART 1-6
Employment status of architects



Seventy seven per cent of architects are working full-time, 8 per cent working part-time. The highest level of part-time working is in Luxembourg (12 per cent) and Denmark (11 per cent), closely followed by Germany, the Netherlands and Sweden each with 10 per cent.

16 per cent of all architects in Europe are not economically active - retired, unemployed, or not working for other reasons.

The original survey results have been amended using data collected for Phase I of this study to take account of a perceived under-reporting of retired and not economically active respondents. See the Appendix for a further explanation.

Years Qualified as an Architect

TABLE 1-5

Number of years qualified as an Architect, analysed by country

per cent	number of years qualified as an architect							
	1	2	3 to 5	6 to 9	10 to 14	15 to 19	20 to 24	25 +
Austria	5	1	11	17	19	18	12	16
Belgium	9	4	10	16	14	9	12	25
Denmark	6	4	13	17	13	9	10	28
Estonia	0	0	4	12	20	12	16	36
Finland	0	3	10	15	15	14	11	32
France	1	0	2	23	25	3	24	23
Germany	1	2	9	18	18	18	12	22
Greece	4	8	19	13	10	9	9	27
Ireland	0	0	6	23	24	15	13	18
Luxembourg	1	1	7	15	17	19	20	20
Malta	2	6	20	18	10	18	6	19
Netherlands	1	4	8	13	10	14	22	29
Romania	0	1	17	17	16	7	9	30
Slovenia	1	1	4	27	33	7	8	20
Sweden	6	6	14	13	11	6	10	33
Turkey	5	8	16	15	14	11	11	20
United Kingdom	11	5	16	16	13	9	10	20
EUROPE - 17 *	4	3	11	17	17	12	13	23

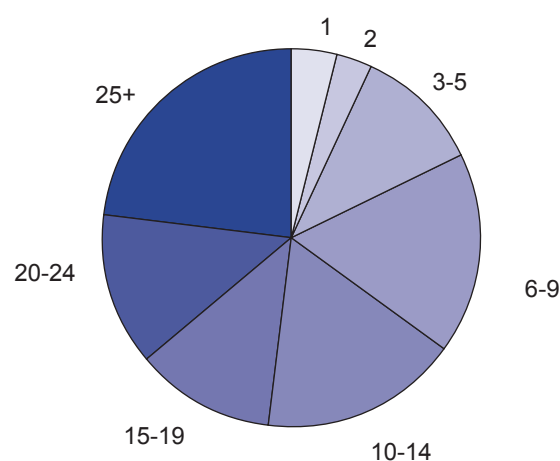
* weighted to reflect the total architectural population in all 17 countries.

Almost a quarter of architects (23 per cent) have been fully qualified as an Architect for 25 years or more. Another 25 per cent have been qualified for between 15 and 24 years. Eighteen per cent have been qualified for five years or less.

The highest levels of the most experienced architects are recorded in Estonia (36 per cent have been qualified for 25 or more years), Finland (32 per cent), Sweden (33 per cent) and Romania (30 per cent). The highest proportion of architects qualified for five years or less are recorded in Belgium (23 per cent), Greece (31 per cent), Malta (28 per cent), Sweden (26 per cent), Turkey (29 per cent) and the UK (32 per cent). Interestingly, Sweden emerges as having high proportions architects at both ends of the experience range.

CHART 1-7

Number of years architects have been qualified



Age of Architect

The age profile of the profession is skewed towards younger age groups; 42 per cent are aged under 40. The profession peaks at a relatively young age, in the age range between 35 and 39, after which numbers decline.

A quarter (23 per cent) of the profession is aged under 35, with slightly more (32 per cent) aged between 35 and 44. Thus, a little over half of the profession is aged under 45. Another 27 per cent is aged between 45 and 54. Countries with the youngest profile are Turkey (48 per cent aged under 35), Belgium (41 per cent) and Malta (46 per cent). Countries with the highest proportion of architects aged over 55 are Denmark (26 per cent), Finland (29 per cent), the Netherlands (28

per cent) and Sweden (30 per cent). Fewer than 10 per cent of architects are aged 60 or over.

The age profile is younger for women than it is for men. The peak age group for women is five years younger than for men, and 55 per cent of women architects are aged under 40 compared with 35 per cent of men. Fewer than 10 per cent of women architects are aged 55 or more, compared with 22 per cent of men.

CHART 1-8
Age profile of architects

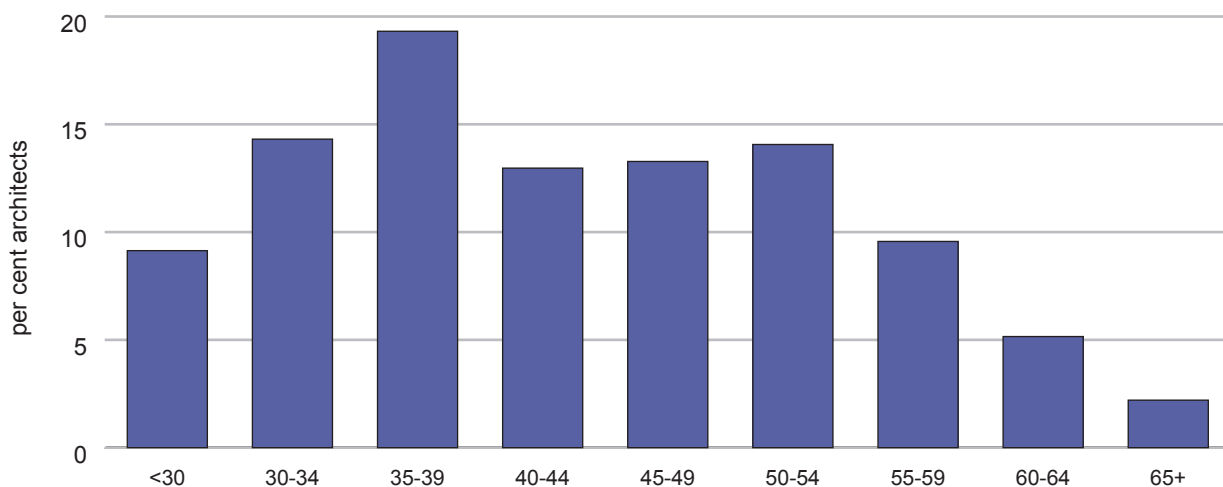




TABLE 1-6
Age of Architects analysed by country

per cent	age of architects								
	<30	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
Austria	0	4	20	23	13	17	9	7	8
Belgium	25	16	13	9	12	8	9	6	3
Denmark	4	18	18	13	9	11	16	10	0
Estonia	4	12	20	12	12	16	8	4	12
Finland	4	11	17	16	11	14	20	8	1
France	1	6	40	3	10	28	8	4	0
Germany	2	12	17	19	18	13	10	5	4
Greece	21	18	14	7	9	14	10	6	2
Ireland	4	25	27	12	10	12	5	3	2
Luxembourg	3	13	23	15	21	12	7	3	4
Malta	23	23	7	16	12	8	7	3	0
Netherlands	3	12	17	11	16	14	15	12	1
Romania	12	23	13	10	6	15	14	5	3
Slovenia	2	20	30	17	9	4	11	7	0
Sweden	10	16	15	9	9	11	13	9	8
Turkey	30	18	13	10	9	9	5	3	2
United Kingdom	12	20	19	13	11	12	10	5	0
EUROPE - 17*	9	14	19	13	13	14	10	5	2

* weighted to reflect the total architectural population in all 17 countries

CHART 1-9
Population pyramid - analysis of architects by age and gender

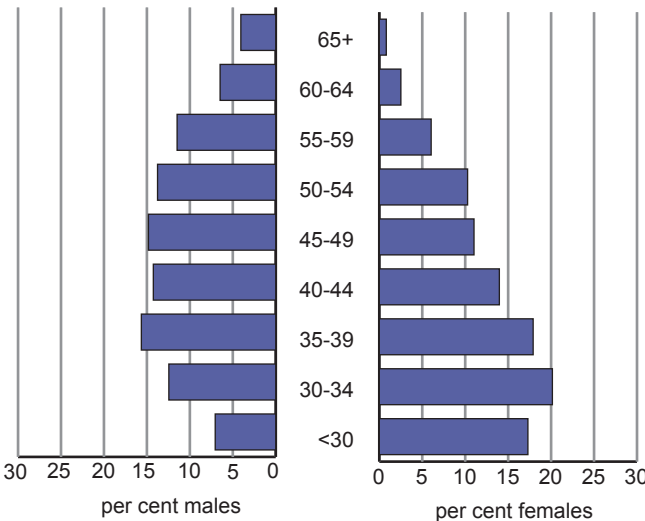
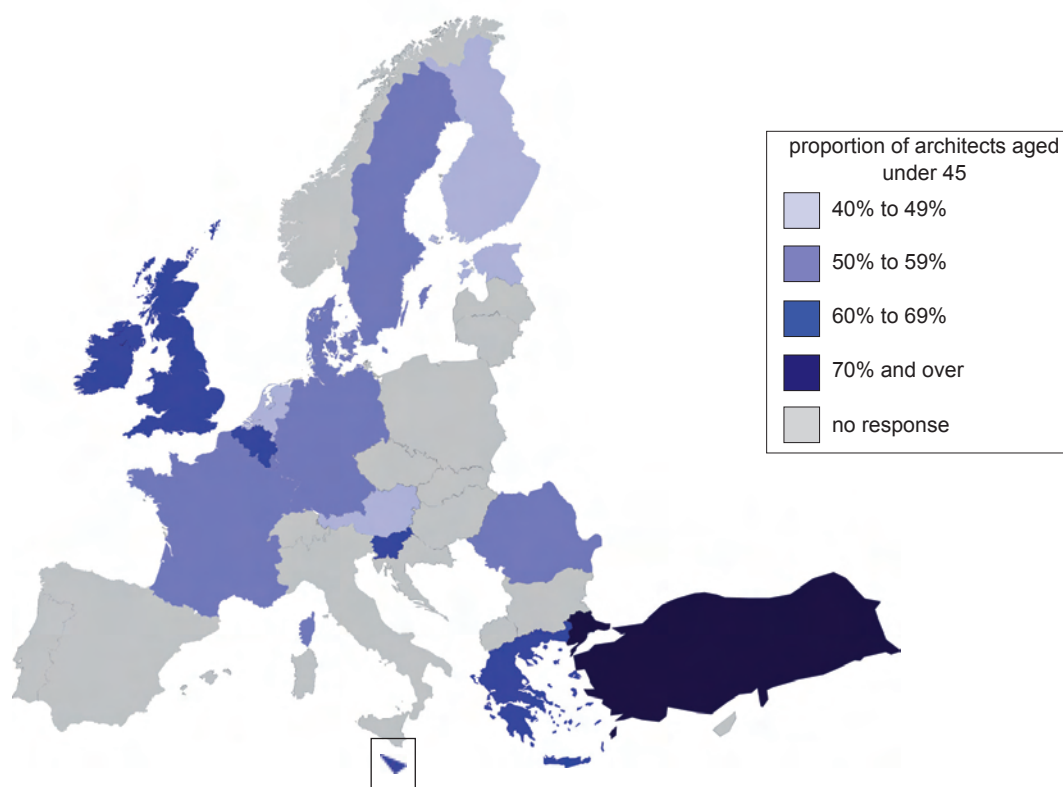


CHART 1-10
Proportion of architects aged under 45



Field of Employment

CHART 1-11
Field of Employment

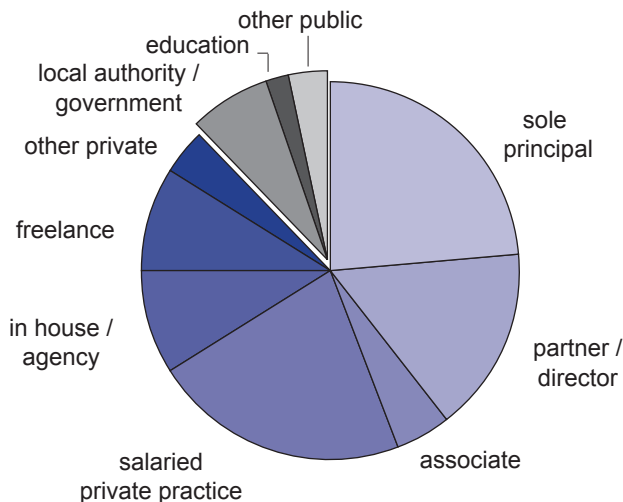


TABLE 1-7
Field of Employment of Architects

	per cent architects working
sole principal	24
partner / director	16
associate	5
private practice salaried	22
in - house	3
agency	6
freelance	9
other private	4
local authority - municipal	5
local authority - regional	1
central government	1
education	2
health	<1
other public	3
chef de project	<1
EUROPE - 17 *	100

* weighted to reflect the total architectural population in all 17 countries

A significant proportion of architects operate alone as Sole Principals (24 per cent) and Freelancers (9 per cent) which is typical of the 'liberal professions'. Including Sole Principals, private practice dominates and accounts for more than two thirds of the profession (67 per cent). One quarter (27 per cent) of architects work in private practice as salaried architects (including Associates), while the remainder are Principals, Partners or Directors, with an equity stake in the practice.

Outside private practice, the principal employer is Government and Local Authorities. Five per cent of architects work for a Municipal Local Authority, 1 per cent for a Regional Local Authority and 1 per cent for Central Government or its agencies. Taken together, the public sector employs 13 per cent of the profession.

Private practice is the largest employment field in most countries. The highest level of architects employed in private practices is in Austria (99 per cent). The highest proportion of architects who are Sole Principals is in Austria (66 per cent) and Germany (40 per cent), while the lowest

proportions are in Malta (9 per cent), Sweden (8 per cent) and the UK (8 per cent).

The concept of a 'Freelance' architect varies significantly between countries, with many reporting zero per cent while others as many as one in four architects. Highest levels of Freelance architects are in Belgium (22 per cent), France (25 per cent) and Greece (23 per cent).

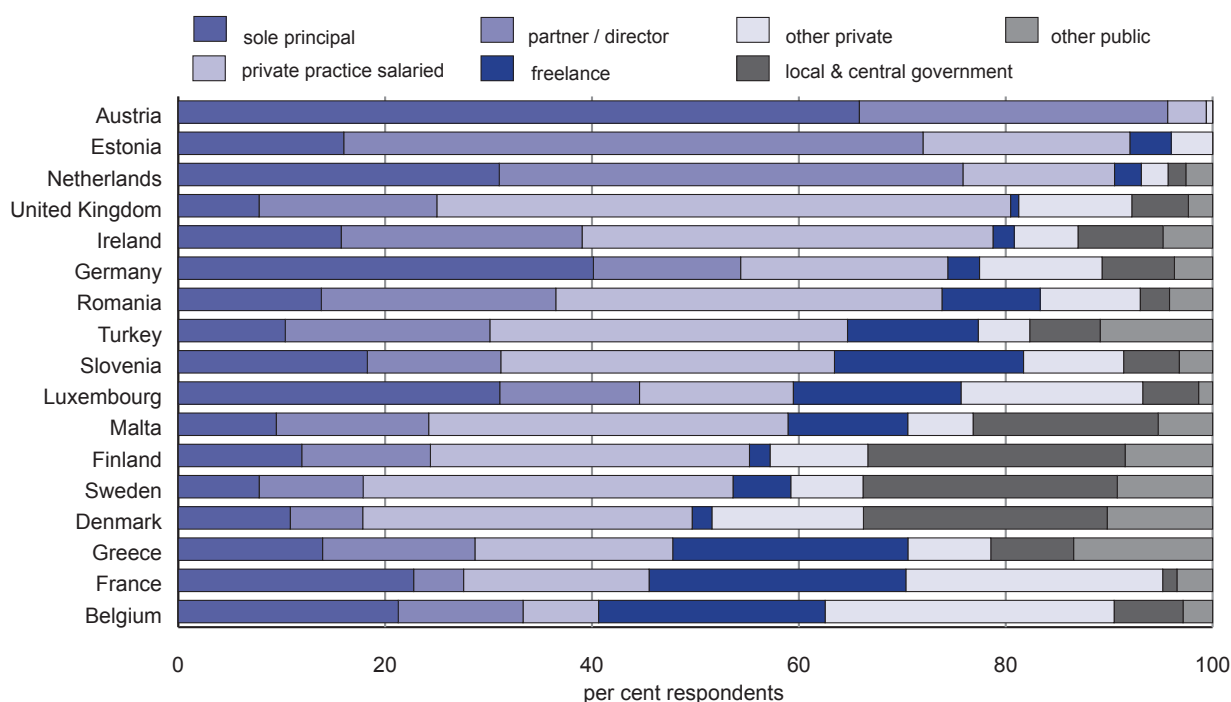
Fewer architects are employed in the public sector than the private sector in all countries. But here too there are significant variations between the countries. Local Authorities account for a very similar proportion (21 or 22 per cent) in each of Denmark, Finland and Sweden. Local Authority employment in each of these three Scandinavian countries is not only at a remarkably consistent level but is also well above the levels recorded in any other country. Only in Malta, where 13 per cent of architects work in Central Government, is there a noticeably higher public sector presence than anywhere outside Scandinavia.

TABLE 1-8
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	66	30	1	2	0	0	0	1	0	0	0	0
Belgium	21	12	5	3	0	23	22	5	6	0	0	3
Denmark	11	7	6	26	4	4	2	6	21	3	4	6
Estonia	16	56	8	12	0	4	4	0	0	0	0	0
Finland	12	12	0	31	1	5	2	3	21	4	4	4
France	23	5	12	6	1	23	25	1	1	1	1	3
Germany	40	14	1	19	5	3	3	4	7	0	1	3
Greece	14	15	6	13	1	3	23	4	7	1	6	8
Ireland	16	23	14	26	1	1	2	3	6	2	1	3
Luxembourg	31	14	8	7	1	15	16	1	5	0	0	1
Malta	9	15	4	31	1	2	12	3	5	13	1	4
Netherlands	31	45	5	9	3	0	3	0	2	0	2	1
Romania	14	23	12	25	1	6	10	3	2	1	3	2
Slovenia	18	13	10	23	2	5	18	2	5	0	1	2
Sweden	8	10	5	30	1	4	6	2	22	3	6	3
Turkey	10	20	2	33	1	2	13	2	6	1	6	5
United Kingdom	8	17	13	43	4	0	1	7	5	0	1	2
EUROPE - 17 *	24	16	5	22	3	6	9	4	6	1	2	3

* weighted to reflect the total architectural population in all 17 countries

CHART 1-12
Main employment fields by country



The Profession's Reputation

This section of the survey reports on how architects believe they are perceived by others. This data is architects rating themselves. Architect respondents feel they are regarded 'quite highly' or 'very highly' by about half (48 per cent) of their clients, but by only 37 per cent of the public, and by 31 per cent of others in the construction industry. Fifty three per cent believe their fellow professionals rate

them 'quite' or 'very highly, while only 32 per cent believe they are rated 'quite' or 'very' highly by public authorities. And 6 per cent of respondents believe they are perceived 'very poorly' by public authorities – the highest negative score recorded. The profession believes its public regard is highest in the Scandinavian countries and the Netherlands, while the lowest regard emerges in Slovenia, France and Estonia.

CHART 1-13

How well architects think they are regarded - summary chart, ranked, highest first

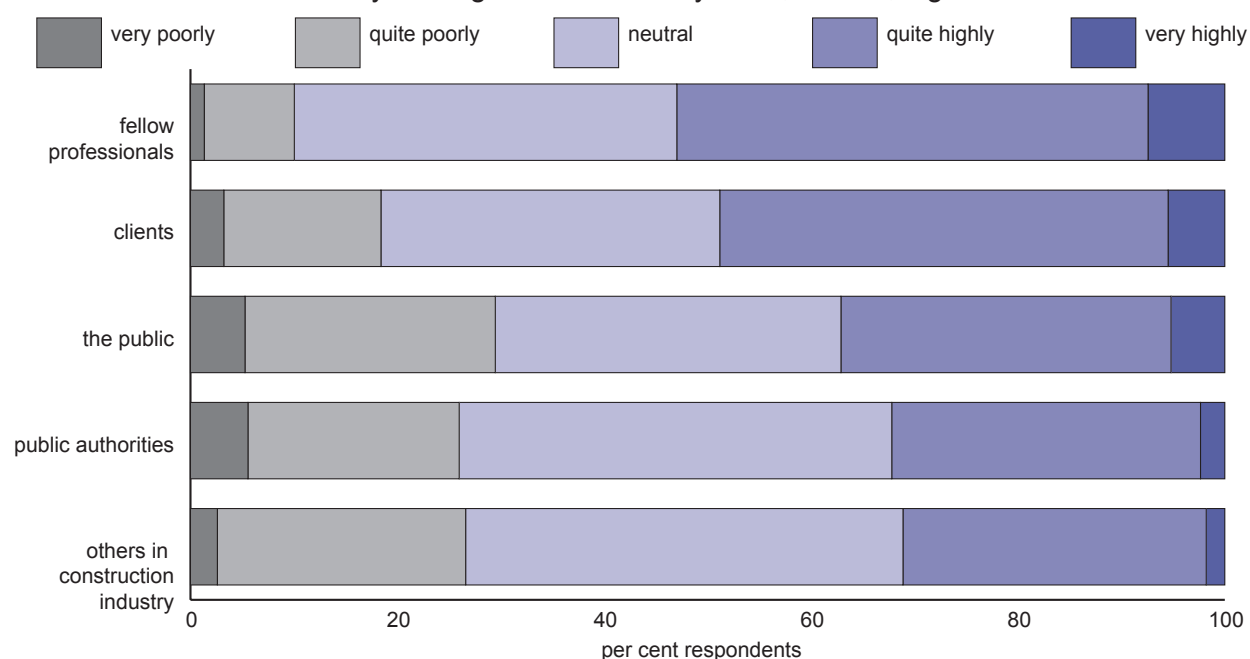


CHART 1-14 (right)

How well architects think they are regarded by the general public

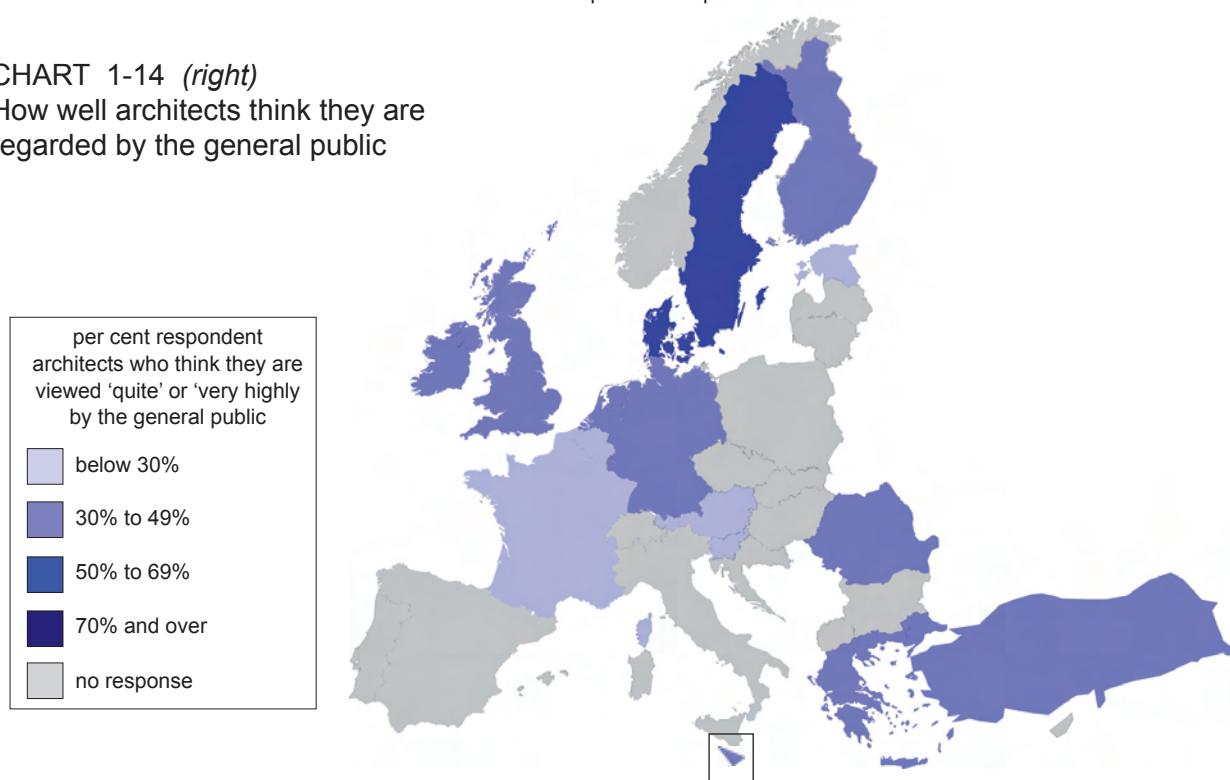


TABLE 1-9

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	5	27	36	29	4
Belgium	5	38	30	24	2
Denmark	1	6	27	57	9
Estonia	0	36	52	12	0
Finland	6	25	25	40	3
France	11	35	33	19	1
Germany	5	25	32	33	5
Greece	8	24	30	32	7
Ireland	5	28	36	29	1
Luxembourg	0	20	37	39	4
Malta	5	13	46	29	6
Netherlands	2	14	37	43	4
Romania	4	25	32	33	7
Slovenia	3	46	29	18	3
Sweden	1	14	30	44	12
Turkey	8	22	39	26	5
United Kingdom	7	20	32	34	7
EUROPE - 17	5	24	33	32	5

CHART 1-15

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

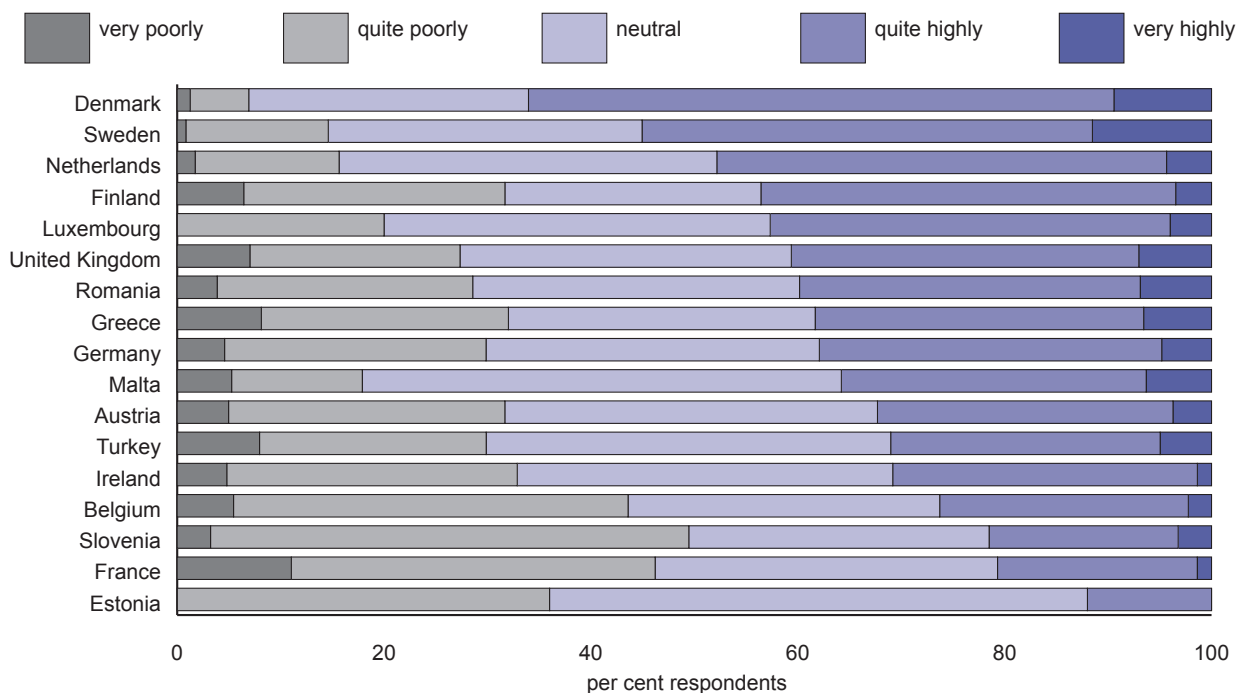




TABLE 1-10
How well Architects think they are regarded by fellow professionals - country analysis

per cent	perception of architects				
	very poorly	quite poorly	neutral	quite highly	very highly
Austria	1	2	35	47	14
Belgium	1	17	36	42	4
Denmark	1	1	11	64	23
Estonia	0	4	28	60	8
Finland	0	5	27	59	8
France	1	21	25	48	5
Germany	1	7	35	50	7
Greece	3	12	31	45	8
Ireland	1	6	27	56	10
Luxembourg	0	4	24	53	19
Malta	0	7	38	51	4
Netherlands	0	4	33	57	5
Romania	1	9	28	50	14
Slovenia	0	20	35	38	7
Sweden	0	4	19	63	13
Turkey	3	13	58	24	2
United Kingdom	2	10	27	54	7
EUROPE - 17	1	9	37	46	7

CHART 1-16
How well Architects think they are regarded by fellow professionals - ranked, highest first

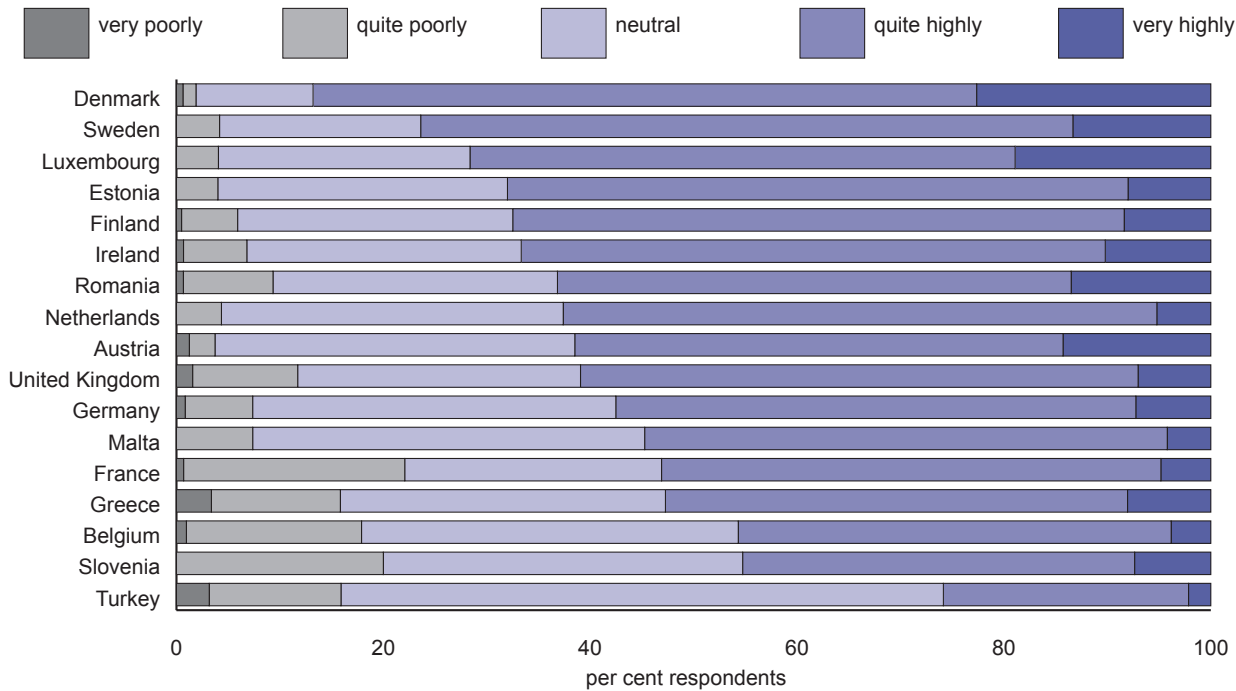


CHART 1-17

How well architects think they are regarded by fellow professionals

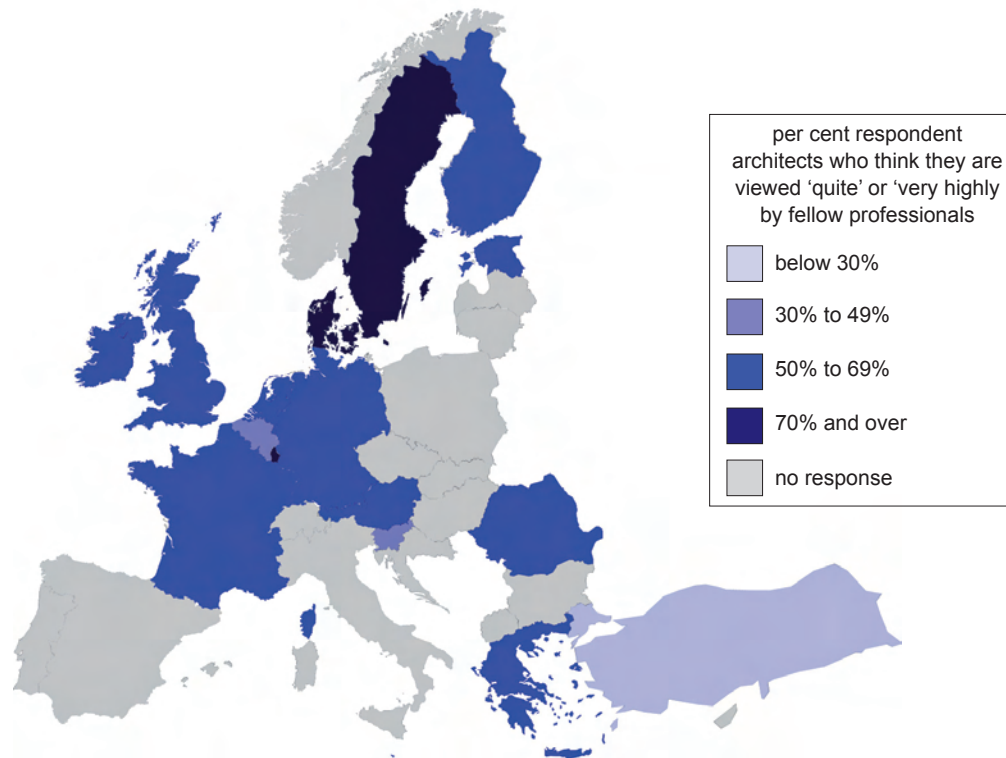


CHART 1-18

How well architects think they are regarded by others in the construction industry

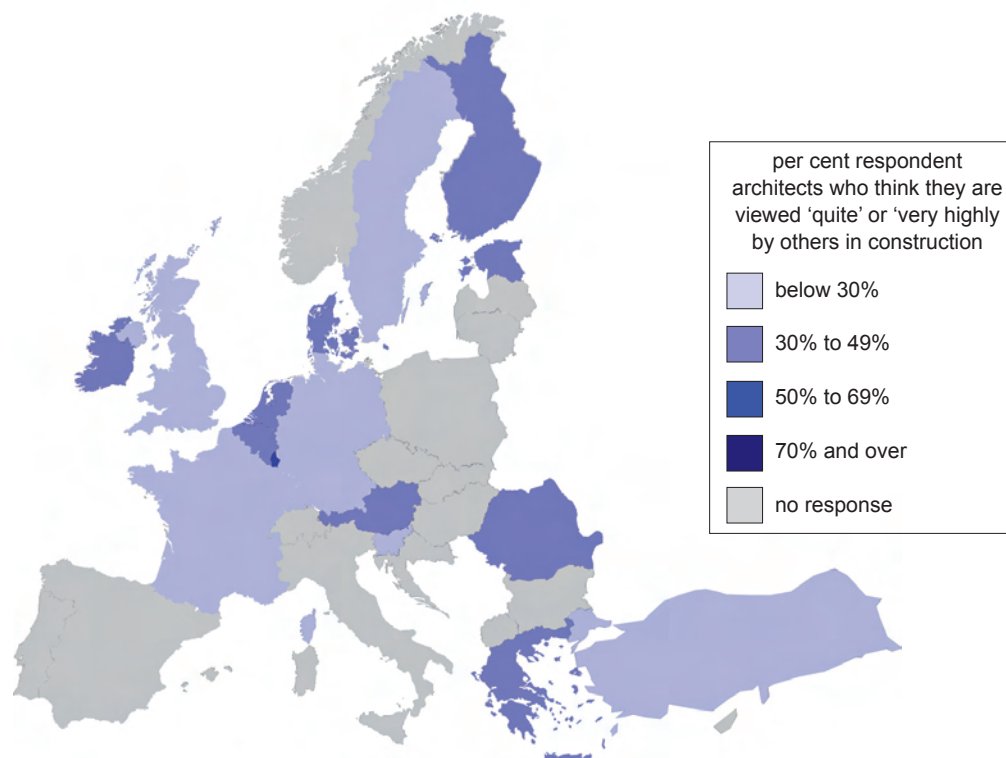


TABLE 1-11

How well Architects think they are regarded by others in the construction industry - country analysis

per cent	perception of architects				
	very poorly	quite poorly	neutral	quite highly	very highly
Austria	4	23	40	31	2
Belgium	3	24	41	31	1
Denmark	0	13	40	46	2
Estonia	0	20	40	40	0
Finland	2	22	35	40	1
France	2	28	46	23	1
Germany	2	27	41	28	1
Greece	5	22	36	32	4
Ireland	1	17	41	39	2
Luxembourg	1	19	27	49	4
Malta	2	9	34	54	1
Netherlands	0	29	33	34	4
Romania	1	18	34	43	4
Slovenia	6	37	47	11	0
Sweden	2	31	43	24	0
Turkey	3	19	53	22	2
United Kingdom	10	27	38	24	0
EUROPE - 17	3	24	42	29	2

CHART 1-19

How well Architects think they are regarded by others in the construction industry - ranked, highest first

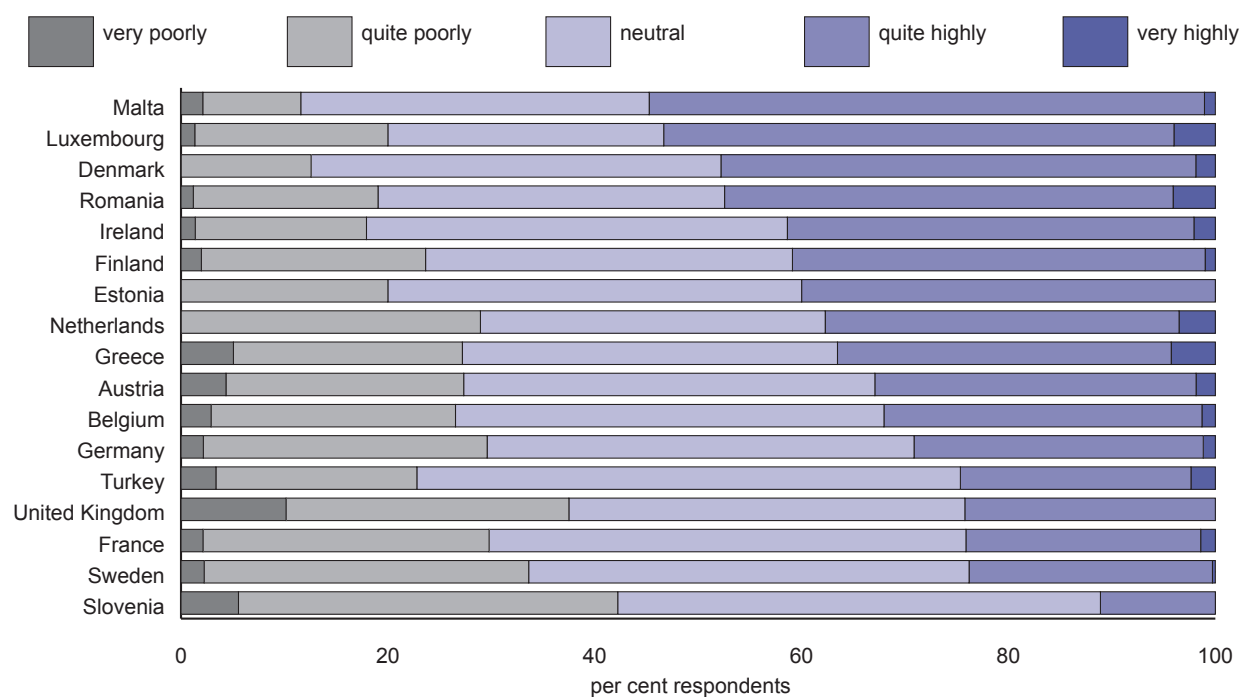


TABLE 1-12

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	0	8	27	49	17
Belgium	3	12	34	48	3
Denmark	0	3	21	71	6
Estonia	0	12	28	56	4
Finland	0	5	24	61	9
France	0	14	24	52	10
Germany	1	11	31	51	6
Greece	4	15	31	43	7
Ireland	1	12	29	58	1
Luxembourg	0	3	27	57	13
Malta	3	7	37	50	2
Netherlands	0	5	29	63	3
Romania	3	14	30	45	9
Slovenia	0	27	36	33	4
Sweden	0	4	31	59	6
Turkey	11	33	42	13	2
United Kingdom	1	13	32	48	5
EUROPE - 17	3	15	33	43	5

CHART 1-20

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

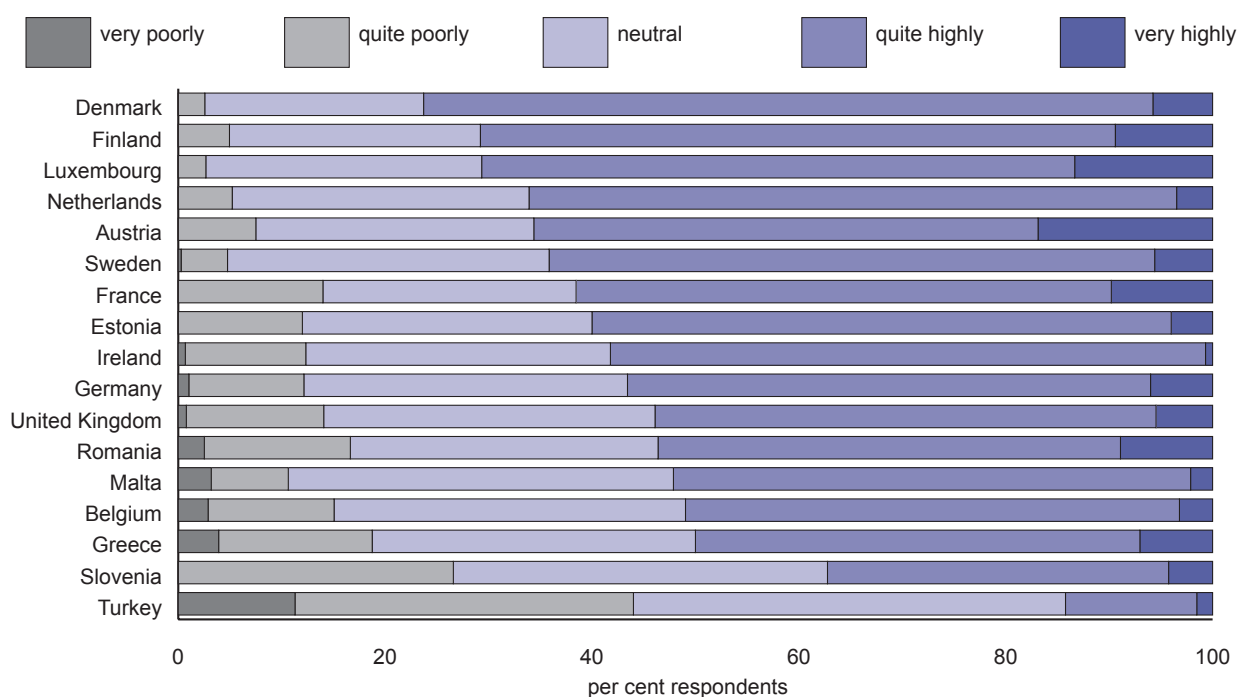




CHART 1-21
How well architects think they are regarded by clients

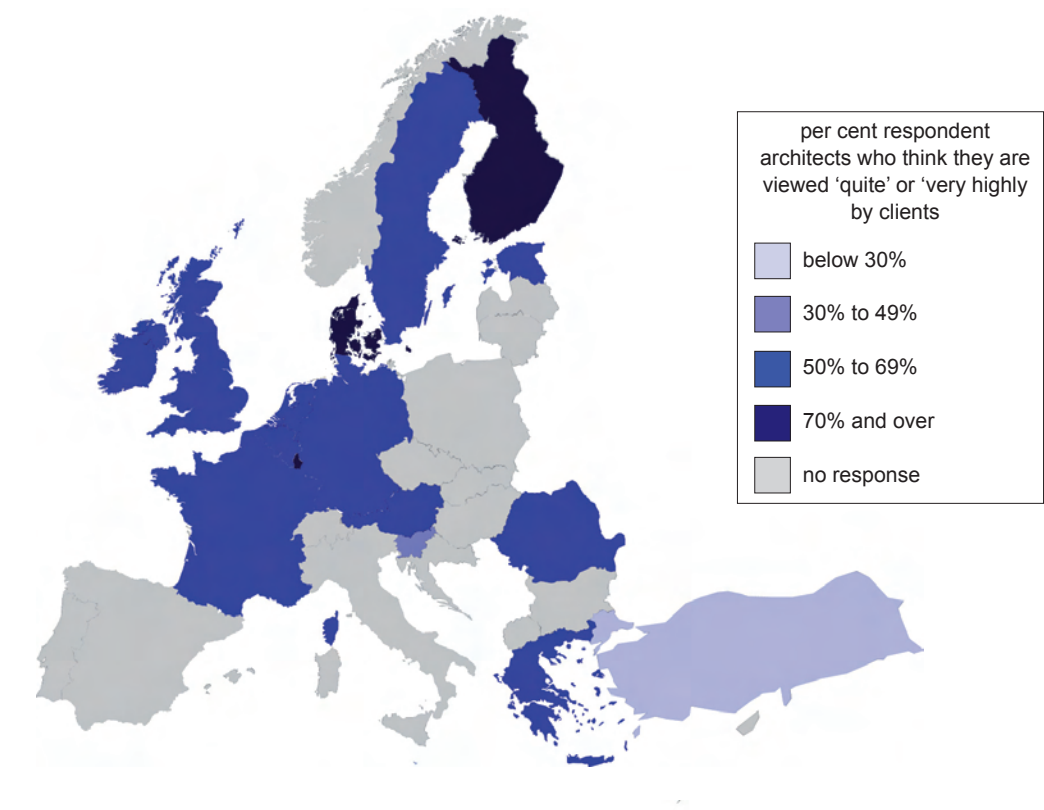


CHART 1-22
How well architects think they are regarded by public authorities

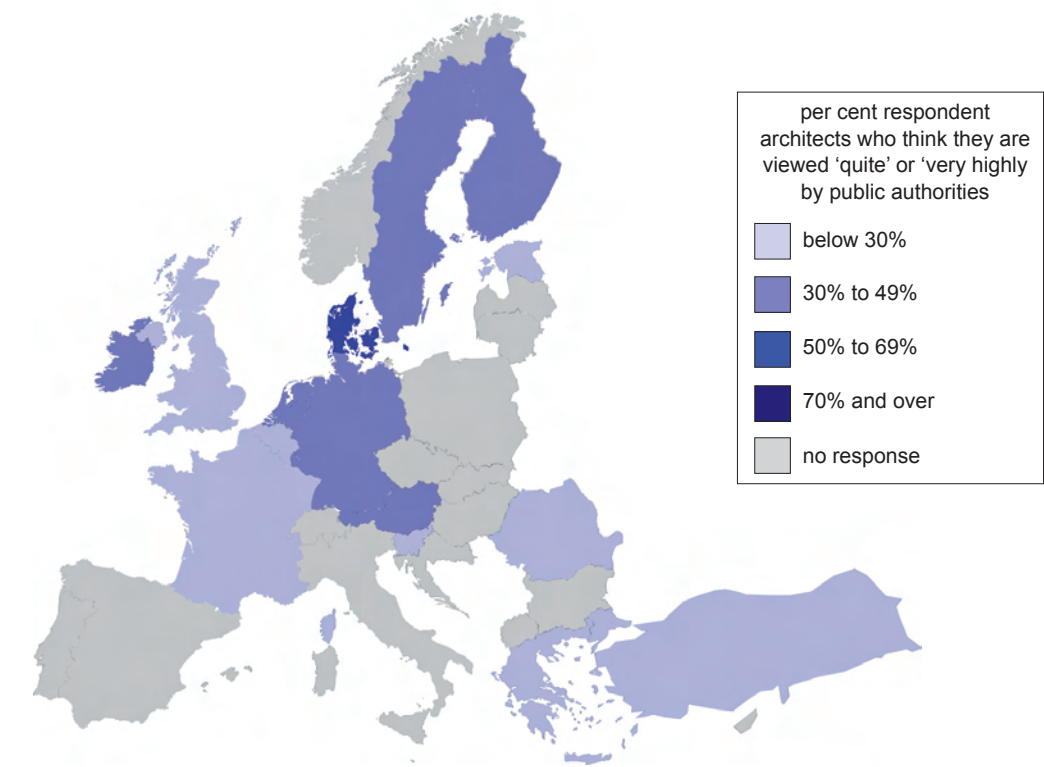


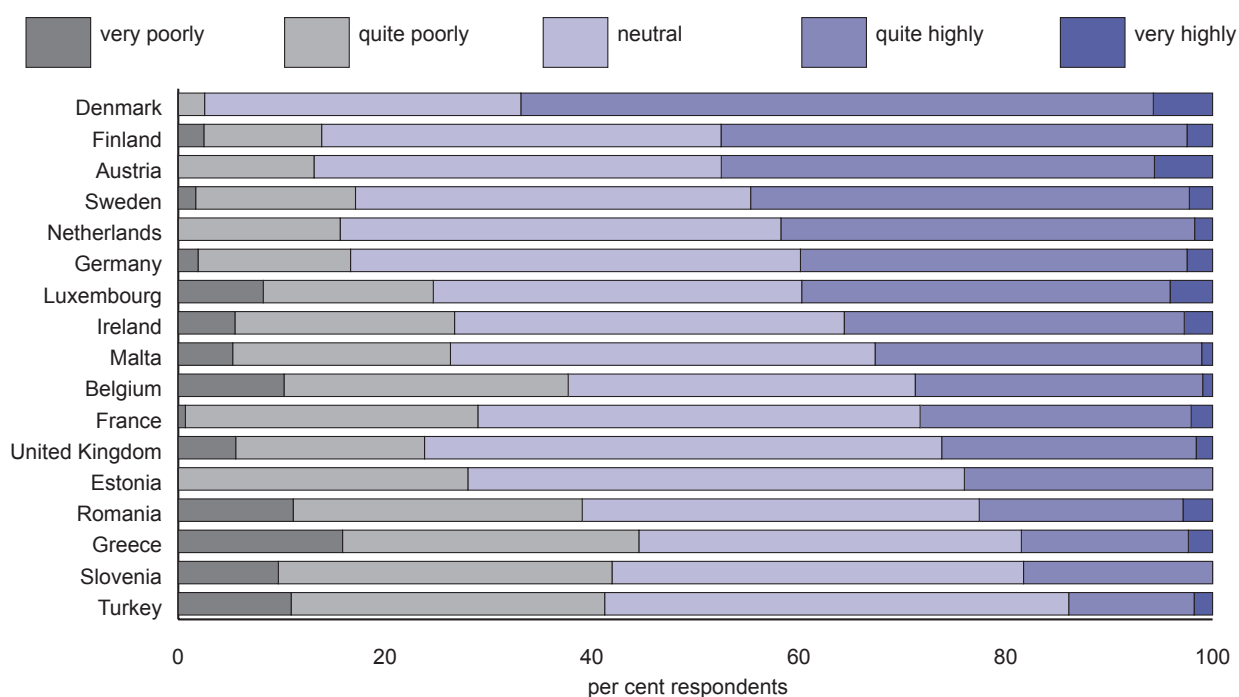
TABLE 1-13

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

per cent	perception of architects				
	very poorly	quite poorly	neutral	quite highly	very highly
Austria	0	13	39	42	6
Belgium	10	27	34	28	1
Denmark	0	3	31	61	6
Estonia	0	28	48	24	0
Finland	2	11	39	45	2
France	1	28	43	26	2
Germany	2	15	43	37	2
Greece	16	29	37	16	2
Ireland	5	21	38	33	3
Luxembourg	8	16	36	36	4
Malta	5	21	41	32	1
Netherlands	0	16	43	40	2
Romania	11	28	38	20	3
Slovenia	10	32	40	18	0
Sweden	2	15	38	42	2
Turkey	11	30	45	12	2
United Kingdom	6	18	50	25	2
EUROPE - 17	6	20	42	30	2

CHART 1-23

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





Architecture - the Market

2

The Construction Market in Europe

The total value of the European construction market ('Europe - 32') is estimated to be worth in excess of €1,650 billion per year. This includes civil engineering and infrastructure work.

There are four significant players, who together account for 54 per cent of total construction output: the UK, France, Germany and Italy.

Construction output has been growing in each of the last ten years. The estimated figure for 2007 is an all-time peak value, up by 4 per cent since the previous year.

Construction output measured per head of the general population works out at €2826 per person. The highest output per head is in Luxembourg, Norway and Ireland - each is over €7,000 per person.

CHART 2-1
Value of Construction Output, average per head

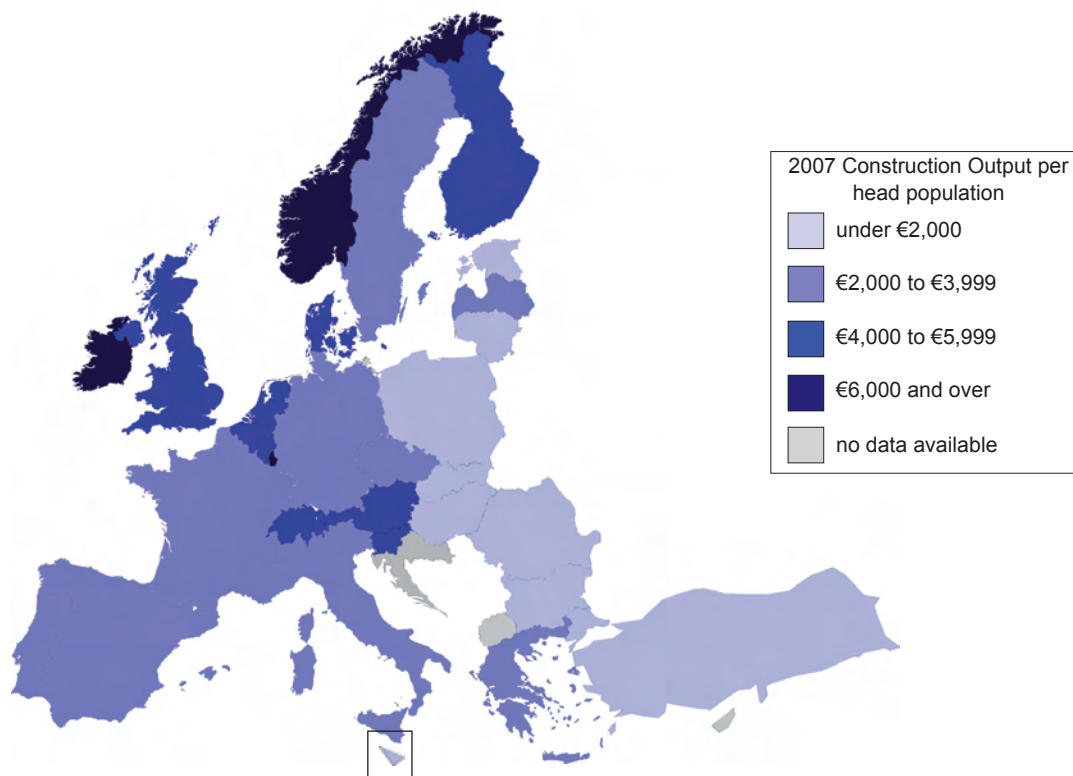


TABLE 2-1
Size of construction market Millions of Euros (or ECU up to 31.12.98)

€ millions	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Austria	26,487	27,037	27,834	28,590	28,211	28,591	30,510	31,622	32,669	34,973	37,544
Belgium	30,368	30,691	33,761	35,862	36,688	36,394	37,680	40,126	42,659	48,680	52,987
Bulgaria	738	1,205	1,396	1,507	1,727	1,813	2,088	2,866	3,999	5,321	n/a
Croatia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Cyprus	1,103	1,149	1,192	1,234	1,324	1,453	1,599	1,834	2,117	2,273	n/a
Czech Republic	11,805	12,426	12,182	12,880	14,255	17,011	17,904	18,686	21,101	25,665	27,934
Denmark	18,167	18,997	19,553	20,550	21,408	21,550	22,492	23,337	25,140	28,552	n/a
Estonia	819	1,075	998	938	1,058	1,252	1,352	1,503	1,992	2,569	n/a
Finland	11,922	13,665	15,099	17,077	17,709	17,457	17,667	18,859	20,867	22,665	26,077
France	n/a	n/a	141,002	157,605	165,636	170,250	177,465	190,175	204,994	228,674	n/a
FYROM	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Germany	232,295	224,543	229,880	225,270	214,460	199,390	195,730	189,440	184,480	198,690	212,890
Greece	14,033	14,900	16,327	21,214	23,107	24,331	27,295	29,244	30,247	31,263	32,969
Hungary	4,258	4,130	4,553	5,430	6,592	8,177	8,021	8,892	9,776	9,948	10,436
Ireland	n/a	n/a	n/a	17,587	19,926	21,294	23,820	27,595	31,556	n/a	n/a
Italy	122,206	123,471	129,065	138,840	148,197	156,842	163,900	173,415	181,237	192,843	203,428
Latvia	572	869	1,047	1,224	1,426	1,627	1,841	2,575	3,167	4,607	6,533
Lithuania	1,192	1,484	1,396	1,348	1,465	1,713	2,131	2,434	2,897	3,873	5,338
Luxembourg	2,041	2,311	2,559	2,810	3,067	3,511	3,671	3,701	4,007	4,290	4,585
Malta	278	271	273	339	328	399	361	362	376	415	415
Netherlands	47,043	49,839	55,027	60,287	64,656	64,880	63,650	63,675	66,284	72,085	78,648
Norway	15,942	16,251	17,220	18,154	19,291	21,625	20,663	21,921	25,847	29,448	35,003
Poland	20,925	25,513	27,084	31,790	34,928	31,244	26,164	27,280	35,680	43,749	n/a
Portugal	19,056	20,848	22,019	24,376	26,226	26,912	25,708	27,167	27,940	27,260	n/a
Romania	n/a	4,226	3,671	4,491	5,486	6,171	6,811	8,114	11,319	15,882	n/a
Slovakia	4,018	3,969	3,127	3,939	4,012	4,605	4,774	5,318	6,300	6,613	8,401
Slovenia	3,209	3,353	3,980	3,741	3,645	3,972	4,346	4,716	5,191	8,947	10,718
Spain	81,376	88,001	98,696	127,335	146,380	n/a	n/a	n/a	n/a	n/a	n/a
Sweden	15,970	16,217	17,240	18,981	19,143	19,842	20,148	22,097	n/a	n/a	n/a
Switzerland	25,147	25,689	26,649	28,585	29,730	31,912	31,181	32,289	33,944	34,534	n/a
Turkey (1)	n/a	1,478	3,096	5,301	13,440	24,802	33,858	39,182	45,590	66,696	70,156
United Kingdom	147,575	161,920	177,002	201,818	214,421	230,849	227,986	250,884	245,458	n/a	n/a
EUROPE - 32	858	895	1,092	1,219	1,287	1,326	1,347	1,415	1,475	1,596	1,658 (2)

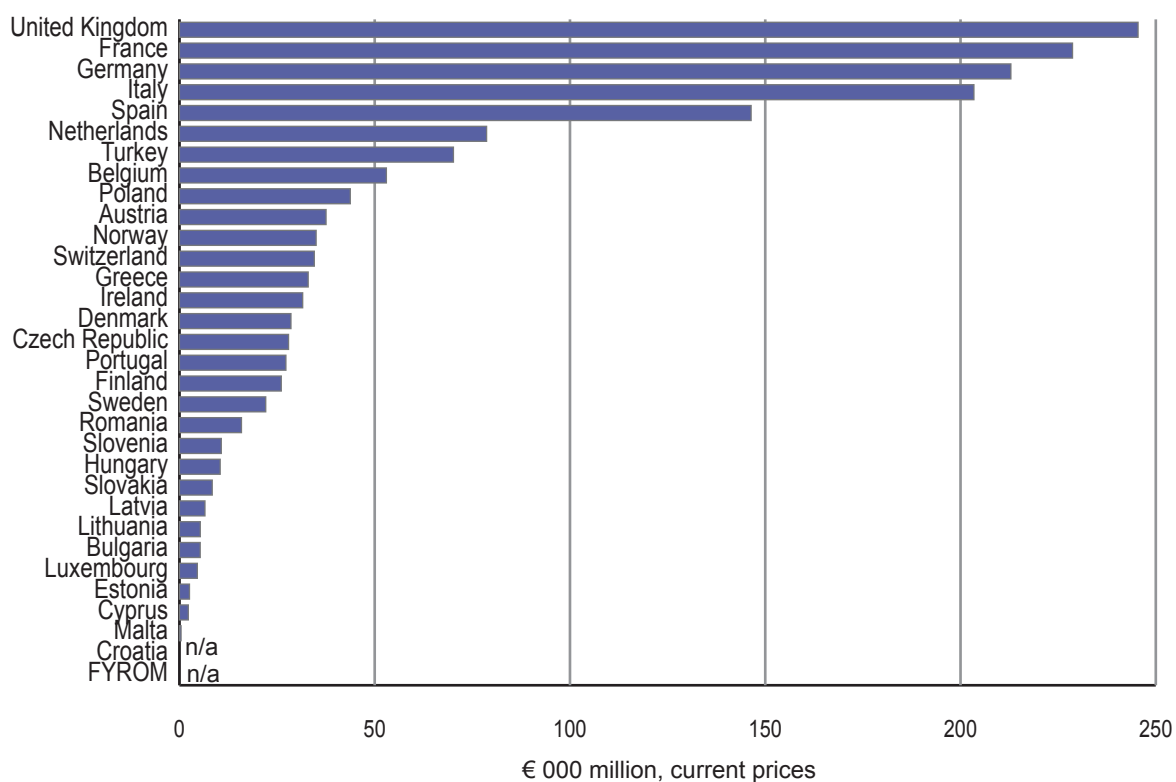
source of all data except Turkey: Eurostat, National Accounts by 31 branches - aggregates at current prices
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(1) Source: Derived from raw data sourced from TurkStat, the Turkish Statistical Institute. Raw data (not reproduced here) is Copyright (c) TURKSTAT. Raw data converted from New Turkish Lira to Euros using conversion rates as at 31.12 each year. NB, conversion rates changed significantly over the period 1997 to 2001, more stable since 2002.

(2) Note: some countries which provided data for previous years are marked n/a for 2007 (and occasionally for 2005 and 2006) so the 'total' figure has been adjusted to include the latest available figure for those missing years. Data for Spain is n/a since 2002, here too the latest (2001) figure has been added to Europe 'total' figure for those missing years. It was decided to use latest available data sourced from Eurostat rather than to research missing data direct from national statistical offices, as it proved hard to reconcile data between different sources.

Construction output includes civil engineering and infrastructure work.

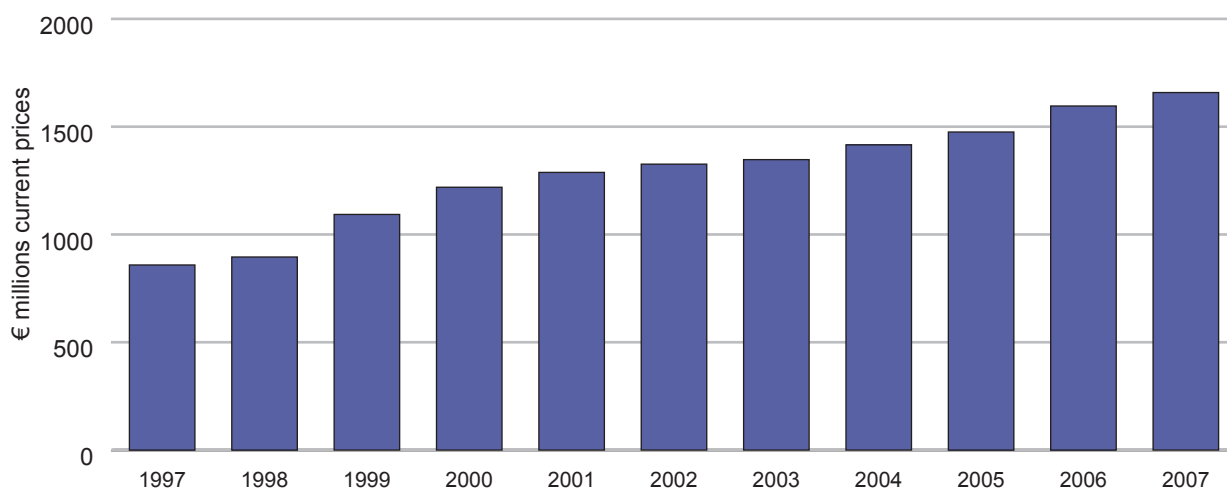
CHART 2-2
Size of Construction Market, Europe



Base: all 32 European countries

Source: compiled from Eurostat and Turkstat data, 2007 data where available, the latest available annual data elsewhere

CHART 2-3
Trends in European Construction Output, 1997 to 2007



Base: all 32 European countries

Source: compiled from Eurostat and Turkstat data, 2007 data where available, the latest available annual data elsewhere

TABLE 2-2

Estimated size of construction market, 2007 (or latest available year) by country, and comparative values

	construction output (€m's)	population (number as at 01.01.2008)	construction output per head of population (€'s)	architects (est. number)
Austria	37,544	8,331,930	4,506	3,800
Belgium	52,987	10,666,866	4,967	11,500
Bulgaria	5,321	7,640,238	696	3,500
Croatia	n/a	4,435,383	n/a	3,000
Cyprus	2,273	794,580	2,861	430
Czech Republic	27,934	10,381,130	2,691	3,000
Denmark	28,552	5,475,791	5,214	7,000
Estonia	2,569	1,340,935	1,916	700
Finland	26,077	5,300,484	4,920	3,600
France	228,674	63,753,140	3,587	29,400
FYROM	n/a	2,045,177	n/a	3,000
Germany	212,890	82,221,808	2,589	95,000
Greece	32,969	11,214,992	2,940	15,000
Hungary	10,436	10,045,000	1,039	4,000
Ireland	31,556	4,419,859	7,140	3,500
Italy	203,428	59,618,114	3,412	123,000
Latvia	6,533	2,270,894	2,877	700
Lithuania	5,338	3,366,357	1,586	2,000
Luxembourg	4,585	483,799	9,477	600
Malta	415	410,584	1,011	500
Netherlands	78,648	16,404,282	4,794	9,100
Norway	35,003	4,737,171	7,389	3,600
Poland	43,749	38,115,641	1,148	13,500
Portugal	27,260	10,617,575	2,567	16,300
Romania	15,882	21,528,627	738	5,500
Slovakia	8,401	5,400,998	1,555	1,300
Slovenia	10,718	2,025,866	5,291	1,350
Spain	146,380	45,283,259	3,233	45,000
Sweden	22,097	9,182,927	2,406	5,400
Switzerland	34,534	7,591,414	4,549	5,300
Turkey	70,156	70,586,256	994	32,300
United Kingdom	245,458	61,185,981	4,012	31,600
EUROPE - 32	1,658,367	586,877,058	2,826	483,480

source: Construction output and population data - Eurostat Copyright © Eurostat. All Rights Reserved.

Construction output includes civil engineering and infrastructure work.

The Architectural Market in Europe

The total value of the architectural market in the 17 surveyed countries is estimated to be €11.6 billion. This relates to the total value of the revenue generated by the profession. This figure is very much of an estimate and relies on survey data from which it has been grossed up; we are not aware of any other published data on the size of the European architectural market with which to compare so this estimate is very much a first attempt at establishing the market size and will be refined in future years. If we were to gross up this figure to reflect all 32 European countries, the total estimated value of the architectural market in Europe is €22 billion.

Two countries emerge as having the largest markets: Germany and the UK. Those two countries alone account for more than half of the total market of the countries surveyed.

Analysed per architect, the highest values are recorded by architects in Ireland, the Netherlands and the UK. The average market size per architect in these three countries is €95,000 or more. By comparison, the average market size per architect is under €25,000 in Finland, Greece, Romania and Turkey.

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

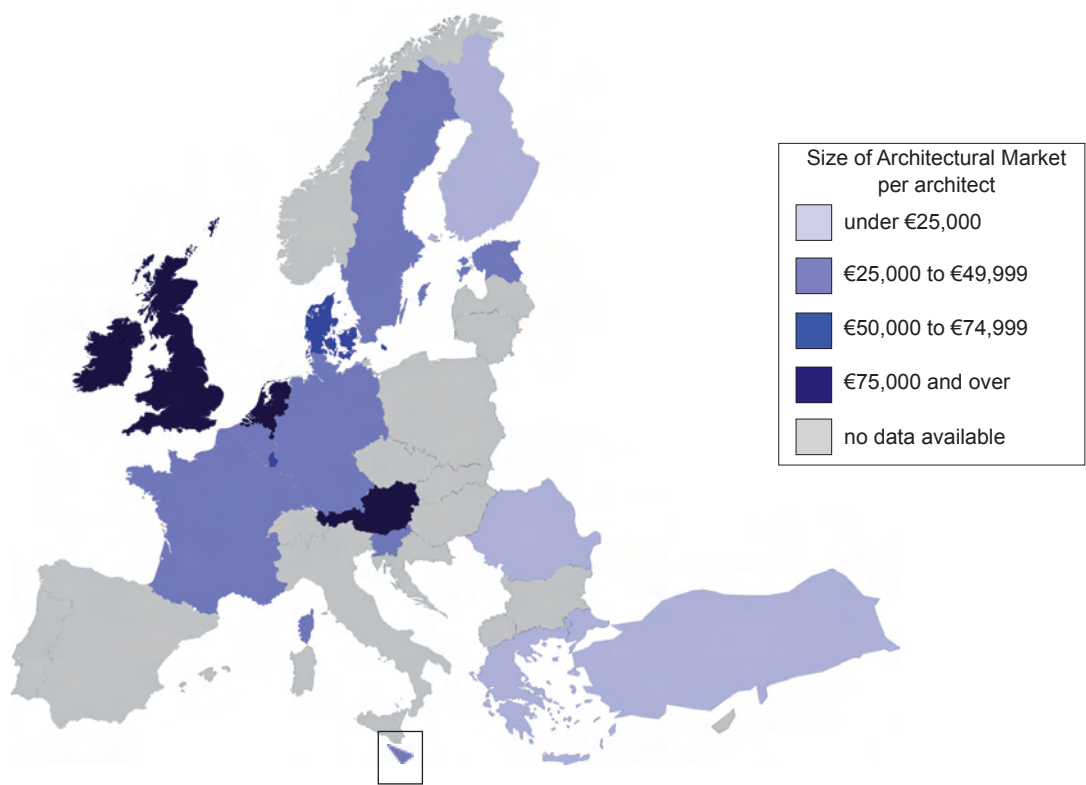
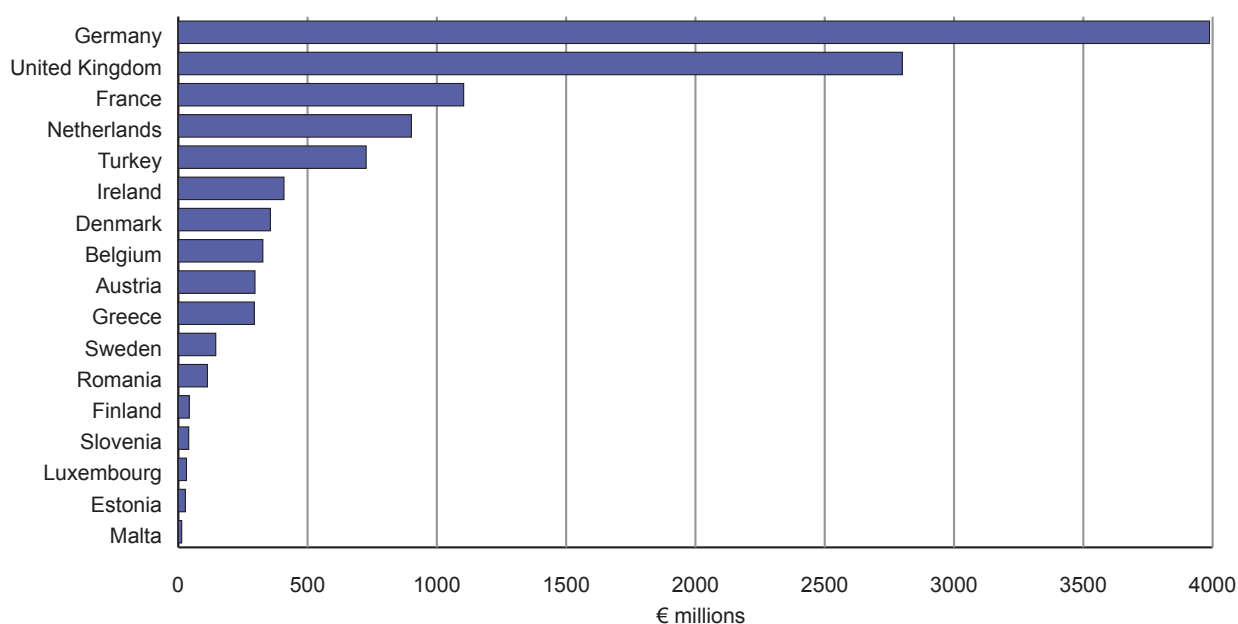


TABLE 2-3
Estimated size of architectural market, by country, and comparative values

	market size (€000's)	value per architect (€'s)	value per 1000 population (€'s)	architectural market as per cent construction
Austria	296,789	78,102	35,621	0.8
Belgium	327,108	28,444	30,666	0.6
Denmark	356,228	50,890	65,055	1.2
Estonia	27,524	39,320	20,526	1.1
Finland	42,580	11,828	8,033	0.2
France	1,103,778	37,543	17,313	0.5
Germany	3,988,103	41,980	48,504	1.9
Greece	294,149	19,610	26,228	0.9
Ireland	408,855	116,816	92,504	1.3
Luxembourg	31,828	53,047	65,788	0.7
Malta	13,320	26,641	32,443	3.2
Netherlands	901,558	99,072	54,959	1.1
Romania	112,659	20,484	5,233	0.7
Slovenia	40,501	30,001	19,992	0.4
Sweden	145,073	26,865	15,798	0.7
Turkey	726,778	22,501	10,296	1.0
United Kingdom	2,800,042	88,609	45,763	1.1
EUROPE - 17	11,616,874	45,405	31,017	1.1

'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 2007. The market size has been estimated, see Appendix I for an explanation of the methodology used.

CHART 2-5
Estimated value of Architectural Market



The Architectural Market analysed by building sector

The largest single sector of the market is work to individual houses. These account for an estimated 31 per cent of the architectural market. Other private housing work – which will include flats and housing developments – account for a further 14 per cent. So in total 45 per cent of the architects' market is private housing. Add in the public housing share and housing in total accounts for 49 per cent.

Eighteen per cent of the market is commercial work, while public works (including public housing) accounts for 24 per cent. Over half of work in Belgium, Greece, Luxembourg, the UK and Turkey is private housing (including

individual houses). The highest proportion of public sector work is in Austria and France. Commercial and other private is highest in Malta, Romania, Estonia and Finland.

Not only is private housing the dominant source of revenue; more architectural practices are involved in private housing than in any other sector. Seventy six per cent of architectural practices have, in the past 12 months, derived revenue from work on individual houses; while 48 per cent have undertaken other private housing work. Forty two per cent have been involved in the office sector.

CHART 2-6

Proportion of market by building sector

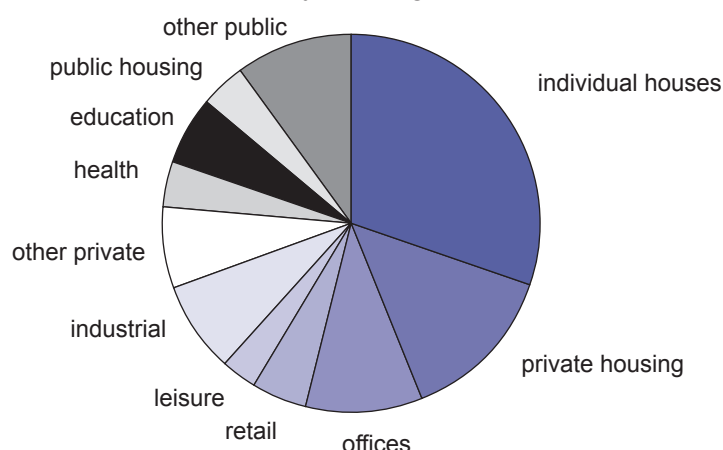


TABLE 2-4

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

	per cent of market	per cent of practices involved
individual houses	31	76
other private housing	14	48
offices	10	42
retail	5	26
leisure and the arts	3	14
industrial	8	32
health	4	14
education	6	22
public housing	4	13
other private	7	29
other public	10	30

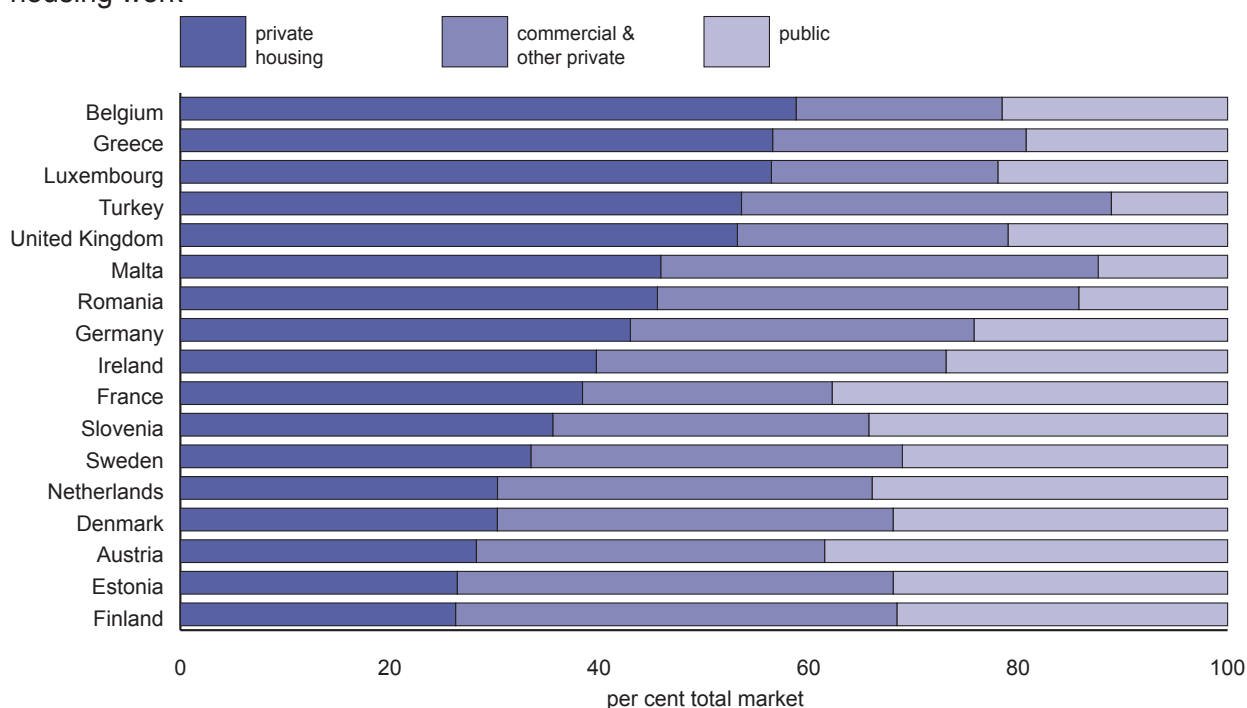
TABLE 2-5

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	20	8	11	3	4	7	7	7	13	8	11	100
Belgium	44	15	7	4	2	5	4	3	5	2	10	100
Denmark	20	11	12	5	5	8	5	6	10	8	11	100
Estonia	18	8	24	6	1	2	3	9	13	8	7	100
Finland	18	8	13	13	4	7	4	6	8	5	14	100
France	24	14	7	4	4	3	7	8	7	6	16	100
Germany	30	13	10	4	2	11	4	7	2	7	11	100
Greece	42	15	7	6	3	4	1	3	3	5	11	100
Ireland	29	11	8	9	4	3	8	7	8	10	4	100
Luxembourg	43	13	8	3	3	4	2	7	2	3	11	100
Malta	28	18	10	10	4	10	3	1	1	9	8	100
Netherlands	18	12	14	4	6	8	8	8	13	4	5	100
Romania	34	11	13	8	3	9	1	3	4	8	6	100
Slovenia	27	9	9	2	6	9	2	8	11	4	14	100
Sweden	19	14	14	4	5	6	3	7	11	7	10	100
Turkey	30	23	7	10	2	8	2	2	2	8	5	100
United Kingdom	38	16	8	4	3	2	2	11	3	8	6	100
EUROPE - 17	31	14	10	5	3	8	4	6	4	7	10	100

CHART 2-7

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



The Architectural Market analysed by type of client

Private individuals are architects' principal client type, accounting for almost half (47 per cent) of architectural practices' revenue. This clearly mirrors the importance of individual housing as the largest market sector. Public sector clients account for 22 per cent of revenue while 10 per cent of revenue comes from developers and 14 per cent from private companies.

CHART 2-8
Proportion of market by client type

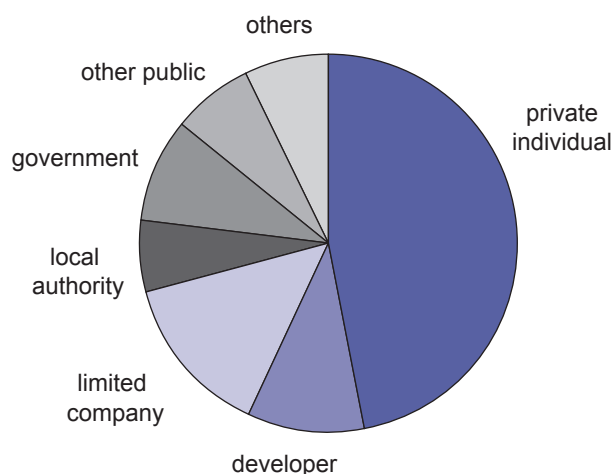


TABLE 2-6
Proportion of work undertaken for different clients, analysed by country

per cent	individuals	developer	limited company	PLC (public limited company)	central government	local government	other public	other private	TOTAL
Austria	40	9	18	0	13	10	4	6	100
Belgium	54	13	11	0	3	2	13	5	100
Denmark	39	19	10	0	3	15	7	8	100
Estonia	25	34	16	0	3	16	6	1	100
Finland	24	15	25	0	3	12	18	2	100
France	34	13	6	0	2	1	35	8	100
Germany	49	6	13	0	7	13	5	8	100
Greece	56	13	9	0	5	7	4	5	100
Ireland	36	21	9	0	4	9	6	14	100
Luxembourg	48	19	4	0	9	3	16	1	100
Malta	34	34	16	0	4	0	4	7	100
Netherlands	36	27	10	0	3	11	8	5	100
Romania	44	22	18	0	2	3	5	4	100
Slovenia	37	20	12	0	9	14	7	2	100
Sweden	32	23	14	0	4	12	9	4	100
Turkey	53	8	22	0	1	4	5	7	100
United Kingdom	48	22	13	0	3	4	1	10	100
EUROPE - 17	47	10	14	0	6	9	7	7	100

The Architectural Market analysed by type of service

Building design is very clearly the principal revenue generating activity, accounting for two thirds (66 per cent) of the total market. The only other significant service type is interior design, which accounts for 9 per cent of the

total architectural revenue. The remainder of the market is split between several types of service, each of which accounts for 5 per cent or less of the total.

CHART 2-9

Proportion of market by type of service

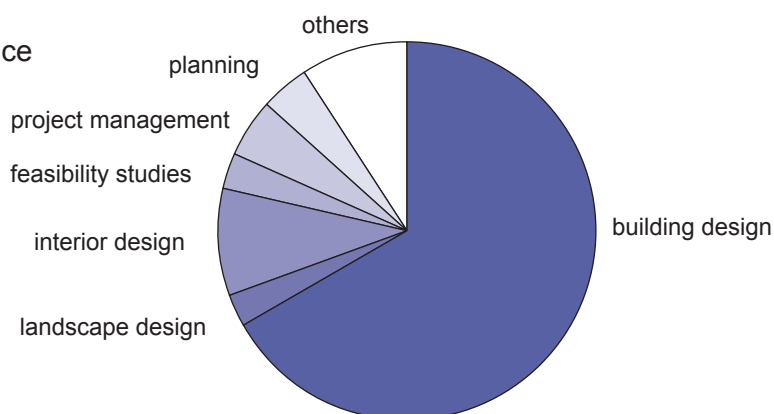


TABLE 2-7

Proportion of work undertaken for each service type

per cent	building design	landscape design	interior design	feasibility studies	project management	planning	other service	TOTAL
Austria	74	0	7	6	2	3	7	100
Belgium	74	1	7	3	9	2	4	100
Denmark	47	6	15	3	12	3	15	100
Estonia	64	5	12	0	5	12	2	100
Finland	78	1	8	1	2	6	4	100
France	72	2	5	5	3	7	5	100
Germany	67	4	7	3	4	3	11	100
Greece	60	6	14	1	6	6	6	100
Ireland	71	1	7	7	5	4	6	100
Luxembourg	71	1	4	5	9	6	4	100
Malta	48	5	8	7	15	3	14	100
Netherlands	69	2	11	5	4	6	3	100
Romania	61	3	12	5	5	10	4	100
Slovenia	59	3	13	1	4	16	4	100
Sweden	56	6	10	2	6	10	11	100
Turkey	60	2	14	2	11	1	10	100
United Kingdom	69	1	6	7	5	3	9	100
EUROPE - 17	66	3	9	3	5	4	9	100

Future Prospects

The results of this question provide one of the more dramatic trend charts in this research. During the five month survey period, the unprecedented volatility in financial markets has massively changed the economic climate, plunging Europe very rapidly into a recession. When the first architects responded to this question in June and July, optimism was strong and significantly outweighed pessimism. Asked “how do you anticipate your practice’s workloads will change in the next 12 months” a majority reported they expected an increase. Subtracting

those who predict a decrease from this creates the ‘balance’ statistic, which is analysed in the chart (right) and map (below). The chart records balance statistics in June and July of up to +47. But by September this had fallen to just below zero, plummeting to –50 by the end of the survey period. Such extreme volatility over the survey period unfortunately means comparisons in architects’ optimism between countries – the original reasons for asking this question – cannot be analysed in a meaningful way.

CHART 2-10
Workload predictions for 2009

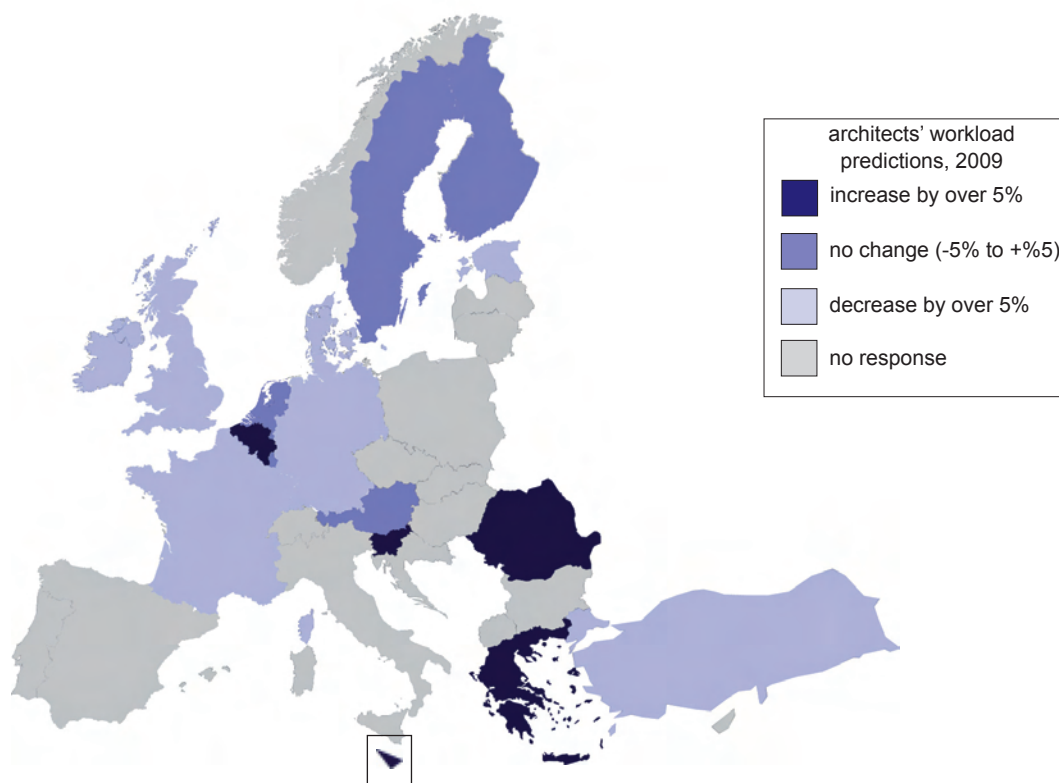
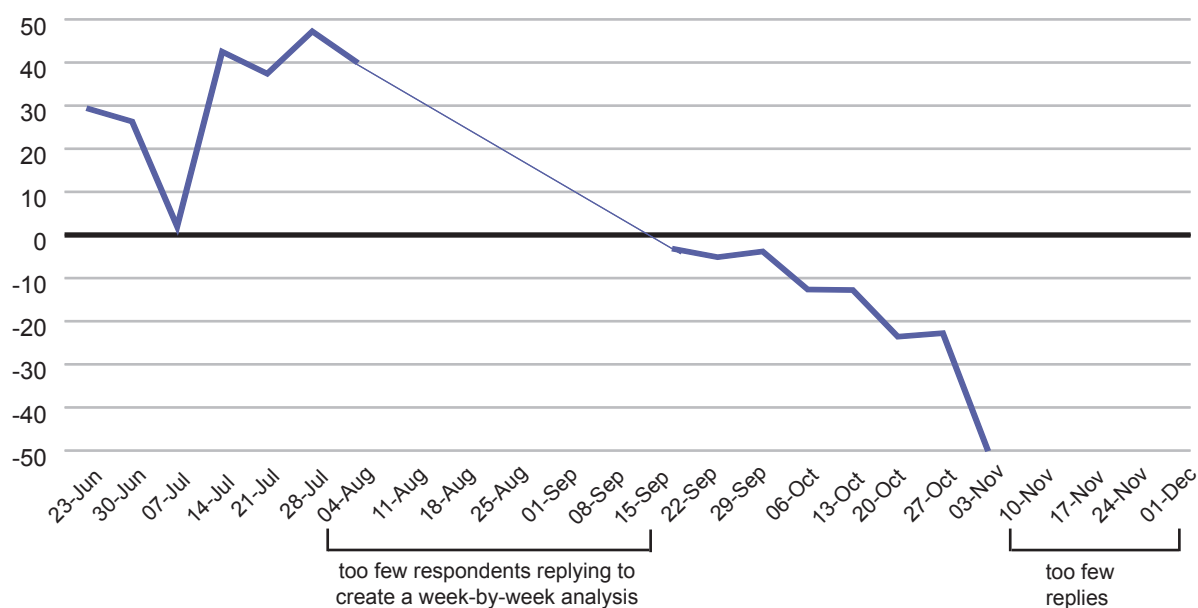


CHART 2-11

Changes in the optimism of respondents during the survey period


TABLE 2-8

Future workload prospects for 2009, analysed by country

	per cent of Principals who expect their practice workloads to change over the coming 12 months			balance	response period
	up	no change	down		
per cent	up	no change	down		start month
Austria	27	47	26	+1	September
Belgium	34	46	20	+14	October
Denmark	28	34	38	-10	October
Estonia	24	24	53	-29	June
Finland	24	47	29	-5	September
France	21	39	40	-19	September
Germany	21	50	29	-8	September
Greece	33	46	21	+12	June
Ireland	19	30	51	-32	June
Luxembourg	25	44	31	-5	October
Malta	44	38	18	+26	June
Netherlands	27	49	24	+3	September
Romania	59	35	5	+54	June
Slovenia	50	39	11	+39	July
Sweden	27	49	23	+4	June
Turkey	27	36	37	-10	September
United Kingdom	29	25	46	-18	October
EUROPE - 17	28	45	28	0	



Architecture - the Practice

3

Profile of Architectural Practices

There are an estimated 69,800 private architectural practices in the 17 responding countries. 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 32 European countries produces an estimate of 130,000 private architectural practices in Europe.

More than half (54 per cent) of these practices are one person firms. A further 35 per cent have between 2 and 5 architectural staff. Eight

per cent of practices have between 6 and 10 architectural staff and 3 per cent have 11 to 30. Only 1 per cent of architectural practices have more than 30 staff. So architectural practices are skewed very heavily towards small firms ('micro-enterprises').

But large firms employ a significant number of architects. We estimate that in Europe -17 countries, 12 per cent of the total private practice workforce, is employed in firms of more than 50 architectural staff. So 19,000 architects are employed in 350 firms. At the other end of the scale, the 37,000 one person firms employ 21 per cent of all private practice architects.

CHART 3-1
Average size of architectural practices

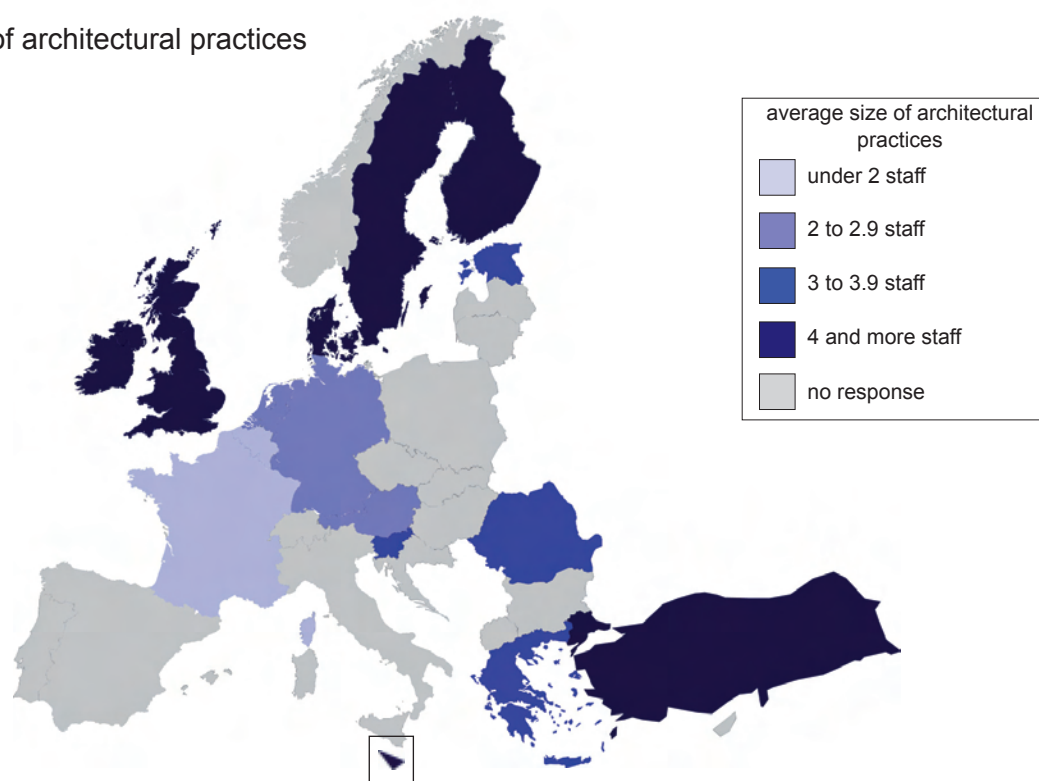


TABLE 3-1
Estimated number and size of architectural practices

	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	985	299	380	94	15	0	0	1,773
Belgium	2,403	701	587	105	82	6	10	3,894
Denmark	393	64	103	81	40	18	28	727
Estonia	81	0	66	28	14	1	0	190
Finland	140	46	54	52	54	4	5	355
France	4,900	1,903	930	366	51	4	3	8,157
Germany	18,970	6,470	4,283	1,908	552	77	51	32,311
Greece	1,563	900	931	235	109	26	57	3,821
Ireland	196	142	190	92	56	10	8	694
Luxembourg	127	22	30	11	4	0	0	194
Malta	33	13	20	5	10	2	1	83
Netherlands	1,896	449	414	278	191	68	8	3,304
Romania	478	227	330	157	68	6	9	1,275
Slovenia	137	38	62	30	19	2	1	288
Sweden	360	68	80	58	44	7	14	631
Turkey	2,136	1,229	1,730	826	395	86	95	6,497
United Kingdom	2,571	918	678	992	310	132	54	5,655
EUROPE - 17	37,369	13,489	10,868	5,318	2,014	449	344	69,851
per cent of practices	54	19	16	8	3	1	1	100

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

CHART 3-2
Practices analysed by size

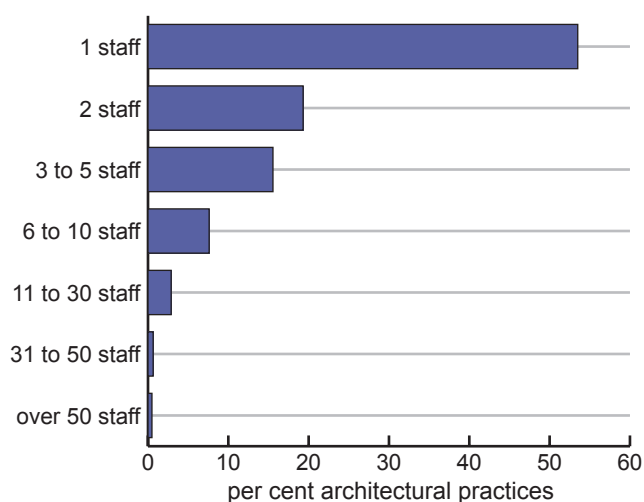
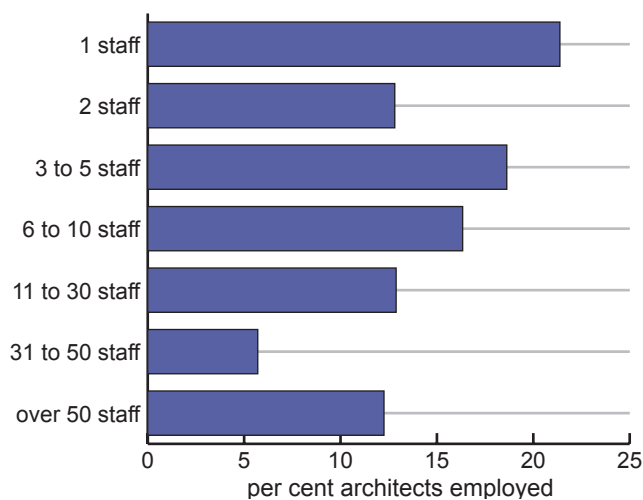


CHART 3-3
Proportion of architects employed in practices of different sizes



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.

Over half of Principals work in practices they classify as ‘Independent Architect’. This may include Freelance architects and architects working on their own as a Sole Principal. The Independent Architect practices model is most common in Austria, Belgium France, Germany and Luxembourg. In each of these countries it accounts for over 50 per cent of architectural practices.

Eighteen per cent of Principals work in partnerships, and rather more – 22 per

cent – are Directors in limited companies. The highest proportion of Principals working in partnerships is to be found in Estonia (44 per cent), Greece (35 per cent). Limited companies are the preferred legal formation in the UK (57 per cent), Turkey (56 per cent) and Ireland (49 per cent). PLC’s are significant only in Finland (52 per cent), Estonia (19 per cent) and Sweden (11 per cent). The highest prevalence of the EIG (Economic Interest Group) business type is in Sweden (18 per cent), Greece (16 per cent) and Malta (13 per cent).

CHART 3-4
Type of architectural businesses

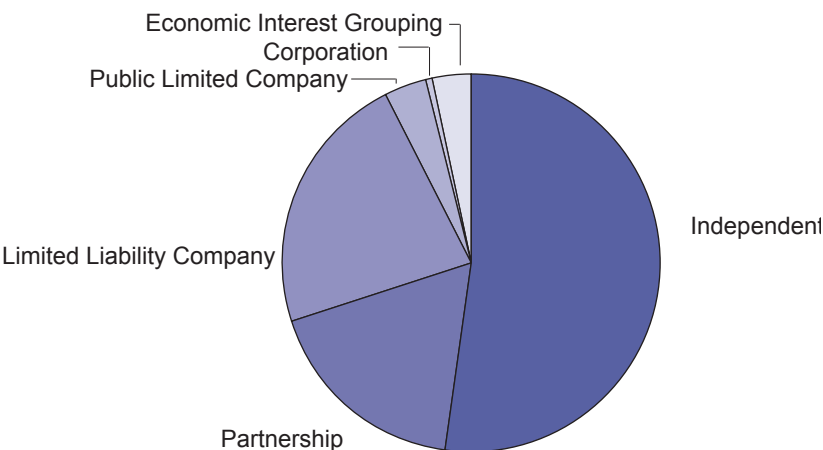


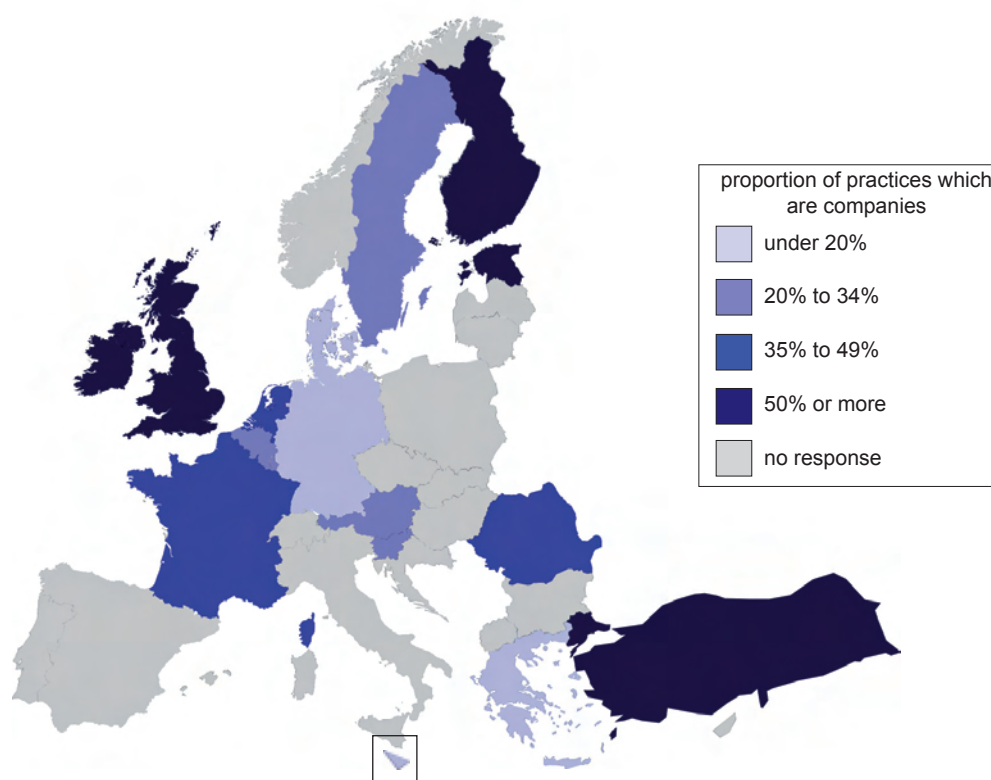
TABLE 3-2

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

per cent	independent architect	partnership	limited company	PLC (public limited company)	corporation	economic interest group
Austria	59	9	29	3	0	0
Belgium	52	12	25	7	2	2
Denmark	48	28	14	3	0	7
Estonia	0	44	25	19	6	6
Finland	32	11	5	52	0	0
France	54	7	35	3	0	1
Germany	70	19	8	1	0	2
Greece	37	35	7	5	0	16
Ireland	33	13	49	3	0	1
Luxembourg	57	11	25	7	0	0
Malta	44	25	16	0	3	13
Netherlands	38	21	32	6	0	3
Romania	28	20	43	3	1	4
Slovenia	35	24	27	4	2	8
Sweden	28	26	16	11	1	18
Turkey	25	9	56	6	1	3
United Kingdom	26	9	57	3	0	6
EUROPE - 17	52	18	22	4	1	3

CHART 3-5

Proportion of architectural practices which are limited companies / PLC's / corporations



Practice Revenue

The survey asked Principals to provide details of their revenue in the calendar year 2007, or the most recent 12 month accounting period. Average revenue rises in line with practice size, with an average of €59,389 for one person practices almost doubling to €117,827 for two person firms. The average for a 3 to 5 person practices is €201,693, less than half that of a 6 to 10 person practice. The averages for larger sizes of firm are only indicative as the staff intervals

are large and there can be a very high variation in revenues reported.

Geographically, highest average revenues per practice (measured for practices up to 10 staff, for which there is least variation) are recorded in France, the UK and Denmark. Lowest average revenues are recorded in Turkey, Greece and Romania.

TABLE 3-3

Average revenue per practice analysed by country and practice size

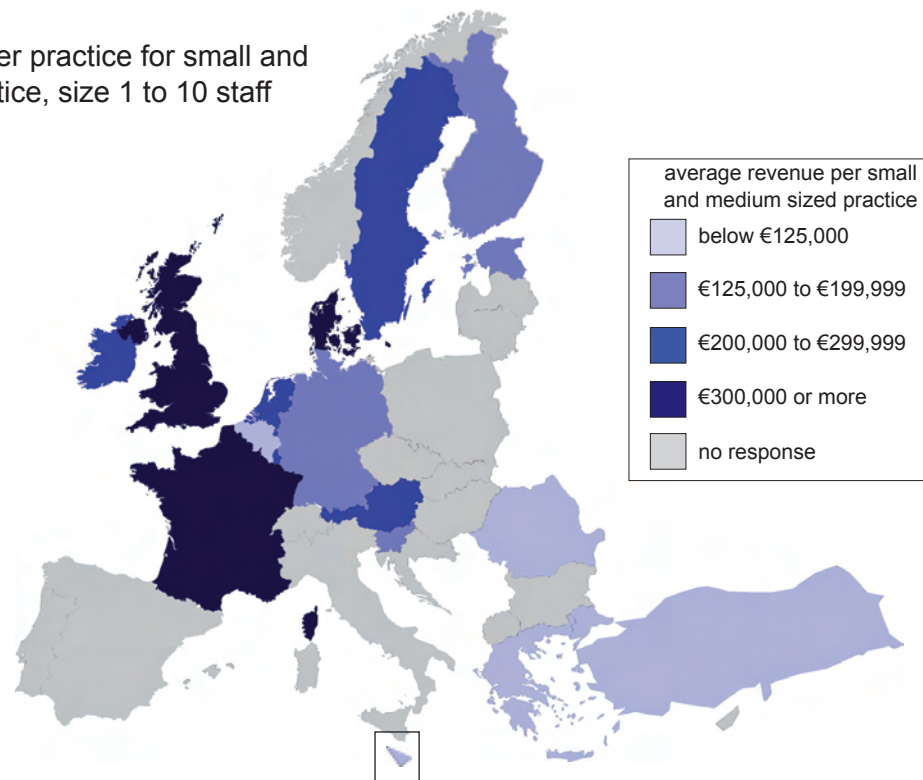
€'s	size of practice (number of architectural staff)						
	1	2	3 to 5	6 to 10	11 to 30	31 to 50	51+
Austria	67,216	198,915	271,281	457,591	1,530,625	n/a	n/a
Belgium	33,457	88,979	147,571	171,167	334,375	1,750,000	n/a
Denmark	72,903	291,700	n/a	566,330	n/a	n/a	n/a
Estonia	n/a	n/a	231,665	322,500	n/a	n/a	n/a
Finland	42,376	70,000	98,545	350,000	62,500	n/a	600,000
France	48,803	138,158	298,773	698,573	n/a	n/a	n/a
Germany	43,604	88,458	197,263	406,027	1,139,455	1,745,167	3,768,279
Greece	29,018	33,612	55,231	284,625	194,708	n/a	1,328,750
Ireland	72,361	146,294	270,556	498,453	1,580,107	4,650,000	n/a
Luxembourg	61,335	n/a	216,417	605,778	1,502,042	n/a	n/a
Malta	46,171	83,375	64,086	236,250	496,725	n/a	n/a
Netherlands	84,497	103,714	292,003	325,909	1,401,228	2,910,834	n/a
Romania	39,555	39,680	72,235	129,915	273,301	n/a	n/a
Slovenia	27,506	51,220	126,564	342,832	750,000	835,000	
Sweden	54,762	257,250	n/a	304,719	521,629	n/a	1,542,654
Turkey	17,028	38,556	57,292	154,042	372,851	n/a	1,261,888
United Kingdom	52,205	130,164	212,467	893,258	n/a	n/a	n/a
EUROPE - 17	59,389	117,827	201,693	498,563	1,282,563	3,156,907	4,563,556

Figures are averages (means)

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

Calculated as the sum of the average of each of four practice sizes. Where data for a practice size is n/a the 'All' average for that size has been applied but grossed up or down dependant upon the grossing factor calculated for available data for that country

CHART 3-6
Average revenue per practice for small and medium-sized practice, size 1 to 10 staff



How Practices Charge for their Services

The most common method of calculating charges is as a percentage of the total contract value. A majority of jobs currently being undertaken by architects are being charged using this method. Next most popular (23 per cent) is a charge agreed after an estimate of time required; while

16 per cent base their charge on an hourly rate. Six per cent of jobs appear to be undertaken 'at risk' where there has been no agreement on charges. Calculating charges as a percentage of the value is the most popular method in all countries except Denmark, Finland, Greece, the Netherlands, Sweden and the UK.

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	67	18	13	3
Belgium	57	21	19	2
Denmark	29	39	23	8
Estonia	47	41	9	3
Finland	5	43	48	3
France	68	26	6	1
Germany	61	18	18	4
Greece	39	41	12	8
Ireland	61	26	7	7
Luxembourg	72	13	13	2
Malta	58	17	13	11
Netherlands	40	38	17	4
Romania	64	23	8	5
Slovenia	60	26	8	7
Sweden	3	39	53	5
Turkey	45	30	5	20
United Kingdom	35	42	18	3
EUROPE - 17	56	23	16	6

Hourly charge-out rates

The Europe-17 average hourly charge-out rate for Principals is €63 per hour. This is the average rate which Principals charge clients for an hour of their work, before tax. This is 21 per cent more than the average rate at which Architects are charged out by private practices (€50 per hour), technical staff are charged-out at an average of €40 per hour.

Average hourly charge-out rates vary considerably between the 17 surveyed countries.

We have attempted to adjust this data to take account of different price levels between the countries, using a Purchasing Power Parity (PPP) index. The PPP hourly charge-out rates (table 3-5) are highest for Principals in Ireland and the Netherlands. Lowest hourly rates are recorded in Romania and Turkey. The pattern is very similar for architects and for technical staff. The unadjusted, 'as reported', figures are presented in table 3-6.

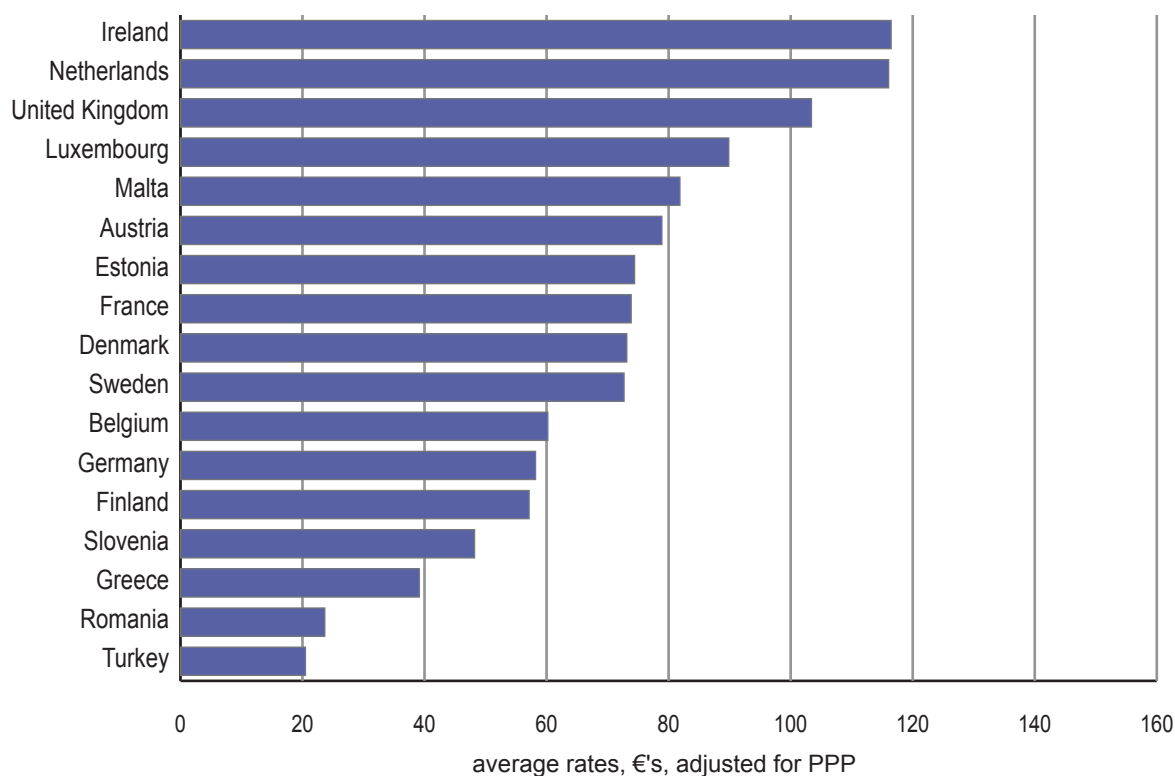
TABLE 3-5
Average hourly charge-out rates ADJUSTED to take account of Purchasing Power Parity

€'s	average hourly charge-out rates ADJUSTED to take account of Purchasing Power Parities (PPP), Euros		
	principals	architects	technologists
Austria	79	69	54
Belgium	60	47	42
Denmark	73	65	54
Estonia	74	46	32
Finland	57	49	41
France	74	69	46
Germany	58	52	39
Greece	39	16	11
Ireland	116	80	60
Luxembourg	90	71	50
Malta	82	61	34
Netherlands	116	92	68
Romania	24	13	7
Slovenia	48	39	23
Sweden	73	64	55
Turkey	20	11	7
United Kingdom	103	79	67

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 with all 27 EU member countries. Thus EU 27 = 100, and for example other indices are: Ireland 124, France 108, Germany 103, Greece 89, Turkey 71, Romania 61. Each country's average hourly rates figure is divided by the country's index value to create the PPP adjusted figure.

CHART 3-7

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	80	70	55
Belgium	64	50	45
Denmark	101	89	74
Estonia	53	33	23
Finland	70	60	50
France	80	75	50
Germany	60	54	40
Greece	35	15	10
Ireland	145	100	75
Luxembourg	101	80	56
Malta	60	45	25
Netherlands	120	95	70
Romania	15	8	4
Slovenia	38	30	18
Sweden	85	75	64
Turkey	15	8	5
United Kingdom	114	87	74
EUROPE - 17	63	50	40

Practice Costs & Profits

Profits expressed as a percentage of revenue decline in line with the size of an architectural practice. So while the pre-tax profits of a one person practice is 52 per cent of revenue, this falls to 31 per cent for a practice of size 6 to 10 staff, and further to 17 per cent for one of 31 to 50 staff. Only in the very largest size does the per cent profit figure rise, to 26 per cent.

The general pattern is repeated in all countries although there may be variations in the definition of 'profits' so inter-country comparisons should be considered with caution. The level of costs is around 50 per cent of revenue for 1 or 2 person firms, rising to between 73 and 83 per cent for firms with more than ten staff.

TABLE 3-7

Proportion of revenue which is 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	48	52	42
2 staff	56	44	32
3 to 5 staff	61	40	28
6 to 10 staff	69	31	23
11 to 30 staff	75	26	18
31 to 50 staff	83	17	12
over 50 staff	73	26	24

CHART 3-8

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

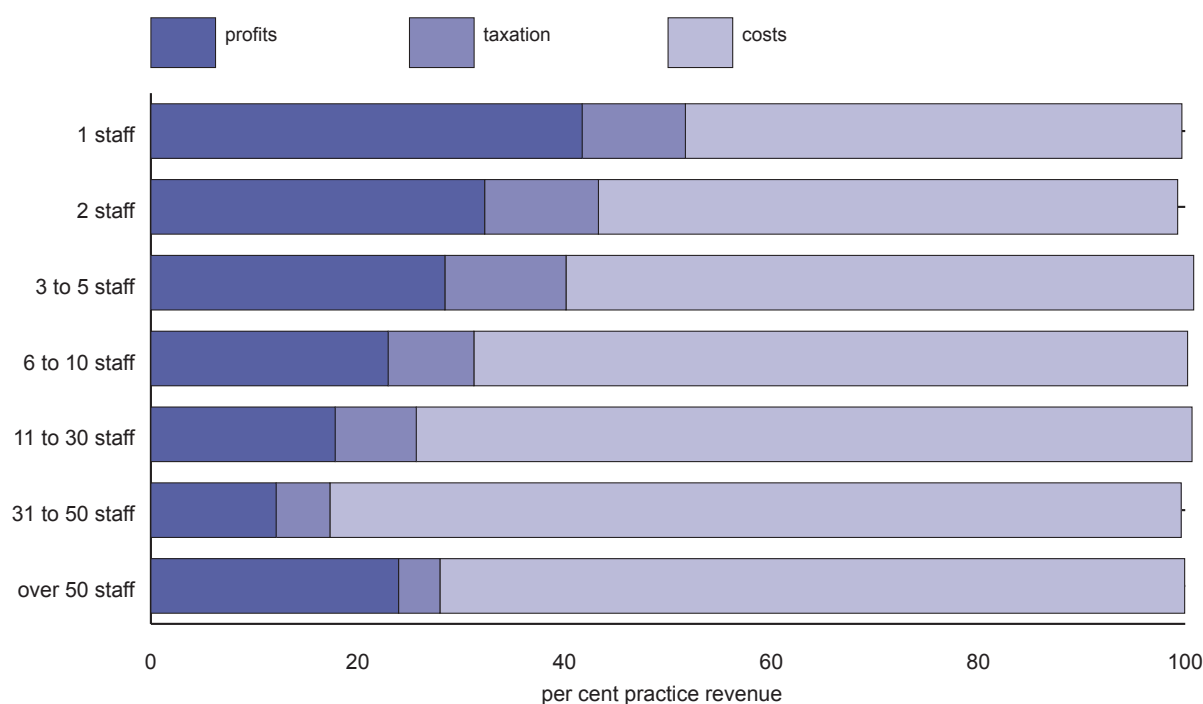


TABLE 3-8

Average pre-tax profits as a per cent 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	46	39	35	16	21	n/a	13
Belgium	43	31	37	14	41	6	n/a
Denmark	72	10	n/a	24	25	n/a	n/a
Estonia	n/a	n/a	14	17	15	n/a	n/a
Finland	44	22	17	10	13	n/a	n/a
France	48	26	23	13	n/a	n/a	n/a
Germany	52	47	40	32	23	13	63
Greece	59	54	54	40	46	92	48
Ireland	51	56	21	40	6	8	n/a
Luxembourg	63	47	18	26	14	n/a	n/a
Malta	61	68	53	52	38	n/a	22
Netherlands	53	45	42	16	9	14	13
Romania	55	45	45	44	33	15	37
Slovenia	35	n/a	39	9	38	2	n/a
Sweden	43	21	35	31	14	7	12
Turkey	56	46	44	37	30	25	5
United Kingdom	67	63	n/a	18	n/a	n/a	n/a
EUROPE - 17	52	44	40	31	26	17	26

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	10	11	9	11	8	7	9
utilities	4	4	3	3	2	3	1
staff	23	40	51	55	62	52	49
travel & motor	15	10	8	5	4	6	9
bank	7	4	3	2	2	3	3
insurance	12	7	5	4	3	4	9
legal & financial	12	10	7	6	5	3	4
promotion	5	3	2	2	3	4	7
other costs	13	10	11	11	10	18	10
TOTAL costs	100	100	100	100	100	100	100

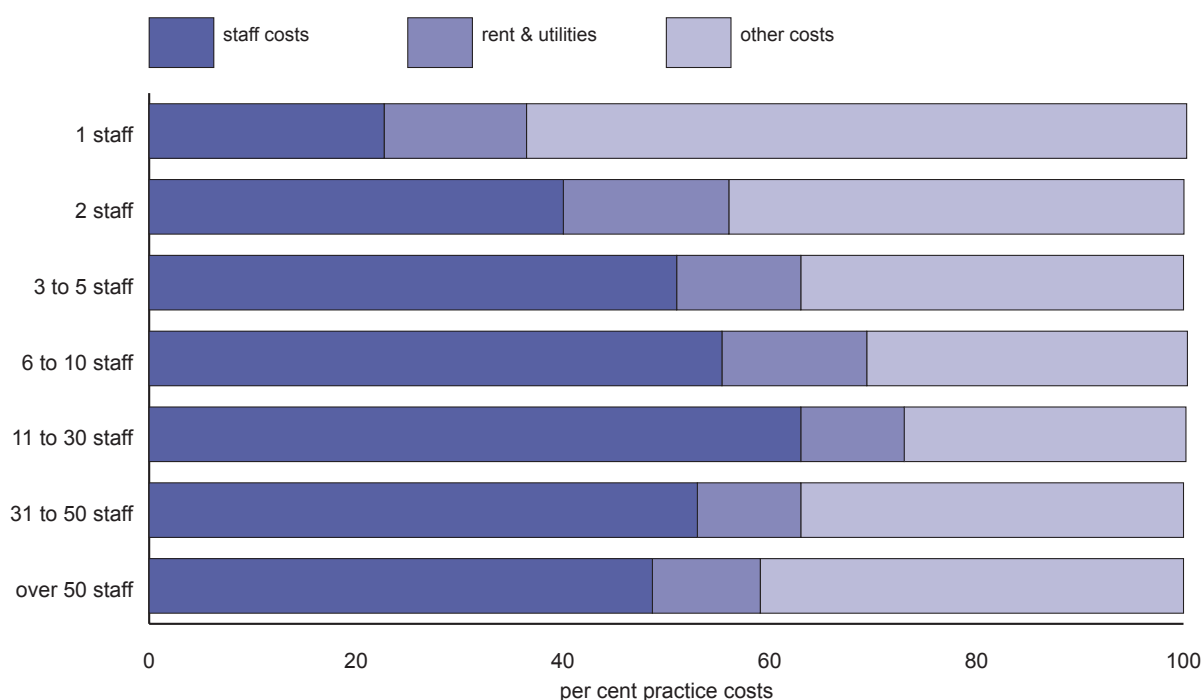
The break-down of costs is explored above. Costs and profits are expressed as a percentage of practice revenue. The largest cost element is staff, accounting for 50 per cent or more of costs in all practices with more than two architectural staff. Rent and utilities account for between 10 and 15 per cent, travel is between 5 and 10 per cent for all but one person practices.

Professional Indemnity Insurance averages at between 3 and 5 per cent of total costs across most practice sizes although is higher for small practices (12 per cent of costs for 1 person practices and 7 per cent for the largest

practices); banking charges are around 3 per cent for medium and large practices. Legal and accounting charges range between 3 and 12 per cent of costs, while between 2 and 7 per cent of costs is accounted for by promotion and marketing. The highest proportion of costs spent on promotion is recorded by the largest practices.

It is remarkable how little difference there is in the break-down of cost elements for practices of size group 3 to 5 upwards. We have not attempted to break this data down by country, as the quantity of the data would not support this.

CHART 3-9
Main cost elements analysed by practice size



Revenue from outside own country

Approximately 6 per cent of practice revenues are generated by work undertaken outside the country in which the architectural practices is based. This proportion is highest in Denmark (12 per cent), Turkey (9 per cent), Luxembourg (8 per cent), Romania and Malta (both 7 per cent). The relatively low average figure suggests that the architectural profession remains very localised, preferring to generate most of its revenue from within its own national boundaries. Further, it suggests the profession is cautious in its approach to pan-European working, and that the Single Market model has not been harnessed.

CHART 3-10
Source of revenue

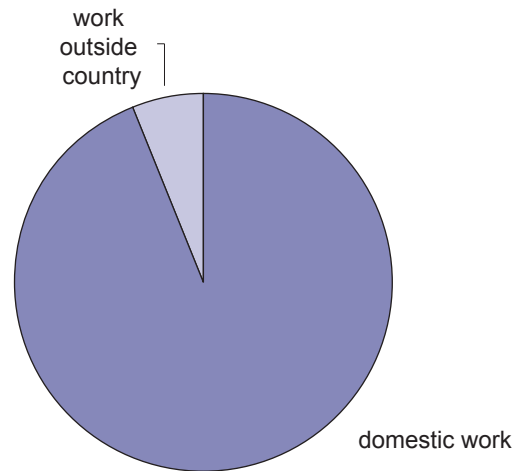


TABLE 3-10
Proportion of practice revenue derived from outside the country, analysed by country

per cent	turnover derived from outside the country
Austria	4.2
Belgium	3.2
Denmark	12.4
Estonia	4.2
Finland	3.9
France	3.9
Germany	3.4
Greece	1.5
Ireland	5.3
Luxembourg	7.6
Malta	7.3
Netherlands	3.4
Romania	7.4
Slovenia	5.3
Sweden	6.3
Turkey	9.2
United Kingdom	5.8
EUROPE - 17	6.0

Associations

A minority of architectural practices have a formal association with another architectural practice. Twelve per cent say they do have such an arrangement with another architectural practice in their own country, 3 per cent have an association with an architectural practice in another country. But there are significant differences between countries. In Germany only

6 per cent have a formal association. By contrast more than a third of architectural practices in Greece, Romania and Slovenia have a formal association with another architectural practices in their own country, while in Finland the proportion soars to 63 per cent. The highest level of association with a firm in *another* country is recorded in Ireland (15 per cent).

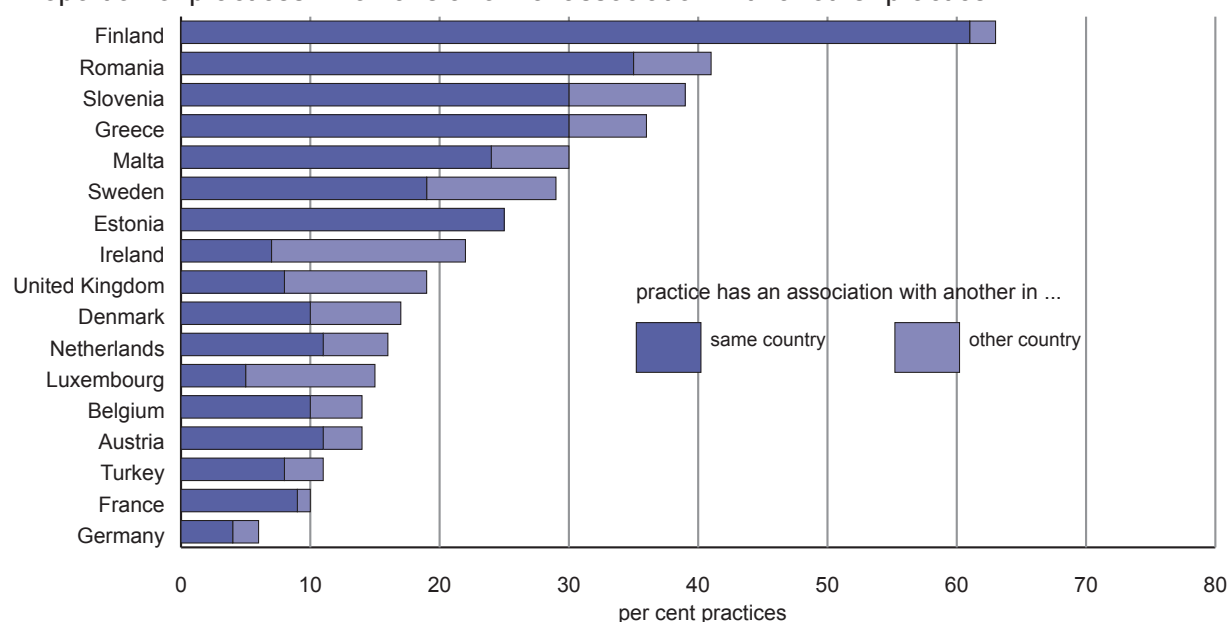
TABLE 3-11

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
Austria	87	11	3
Belgium	86	10	4
Denmark	83	10	7
Estonia	75	25	0
Finland	38	61	2
France	90	9	1
Germany	94	4	2
Greece	64	30	6
Ireland	78	7	15
Luxembourg	85	5	10
Malta	70	24	6
Netherlands	85	11	5
Romania	59	35	6
Slovenia	62	30	9
Sweden	72	19	10
Turkey	89	8	3
United Kingdom	81	8	11
EUROPE - 17	85	12	3

CHART 3-11

Proportion of practices who have a formal association with another practice



Branch Offices

The question “do you work in a branch or subsidiary office” provides a clue as to how many offices an architectural practice might have. So in the UK, which has the highest proportion of architects working in branch offices, this might imply that practices in the UK are more likely to have multiple offices. Data relating to the number of offices was not explicitly collected. Other countries in which a relatively high proportion of architects work in branch offices are Denmark (15 per cent), Romania (15 per cent) and Turkey (14 per cent). In general, however, the proportion of architects working in branch offices is low, at 9 per cent.

The head office of those practices which operate branch offices is usually (in 71 per cent of cases) located in the same country. Only in Greece, Ireland, Malta, Romania and Sweden are head offices in most cases located in a different country.

TABLE 3-12
Proportion of architects working in a branch office

per cent	work in branch office
Austria	3
Belgium	4
Denmark	15
Estonia	5
Finland	6
France	1
Germany	5
Greece	10
Ireland	7
Luxembourg	5
Malta	11
Netherlands	9
Romania	15
Slovenia	6
Sweden	9
Turkey	14
United Kingdom	18
EUROPE - 17	9

TABLE 3-13
Location of branch office's Head Office

per cent	head office is located in...	
	same country as where branch office is located	same country as where architect is registered
Austria	88	88
Belgium	94	96
Denmark	80	97
Estonia	100	100
Finland	78	100
France	97	92
Germany	85	92
Greece	18	94
Ireland	9	82
Luxembourg	56	89
Malta	7	86
Netherlands	60	93
Romania	24	94
Slovenia	67	100
Sweden	18	94
Turkey	87	94
United Kingdom	88	94
EUROPE - 17	71	93



Architects - the Individual

4

Earnings

Architects in Europe earn an average of €36,686 before tax. However, there is a substantial variation in this average across Europe. We have attempted to adjust the average earnings to take account of differing price levels in the 17 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 Netherlands and Ireland closely followed by Austria, the UK and Luxembourg. Average adjusted earnings are lowest in Romania and Turkey.

CHART 4-1
Average earnings, all full-time architects, ADJUSTED for Purchasing Power Parity (PPP)

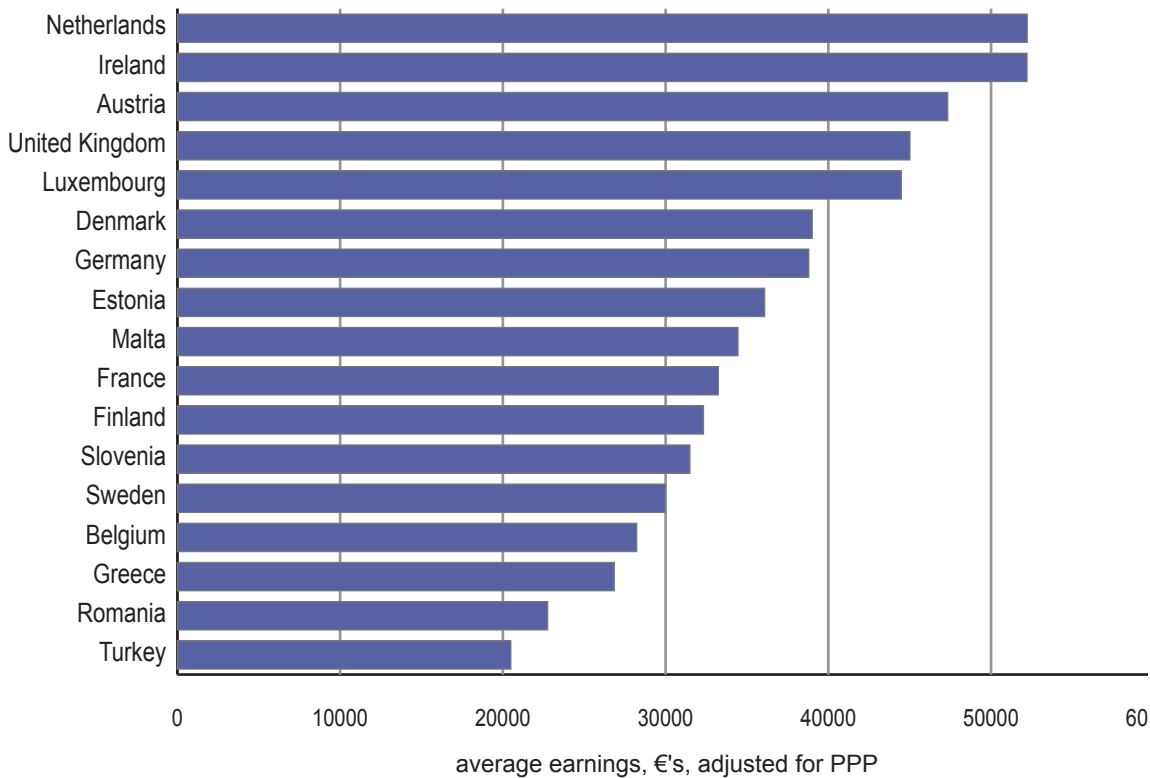
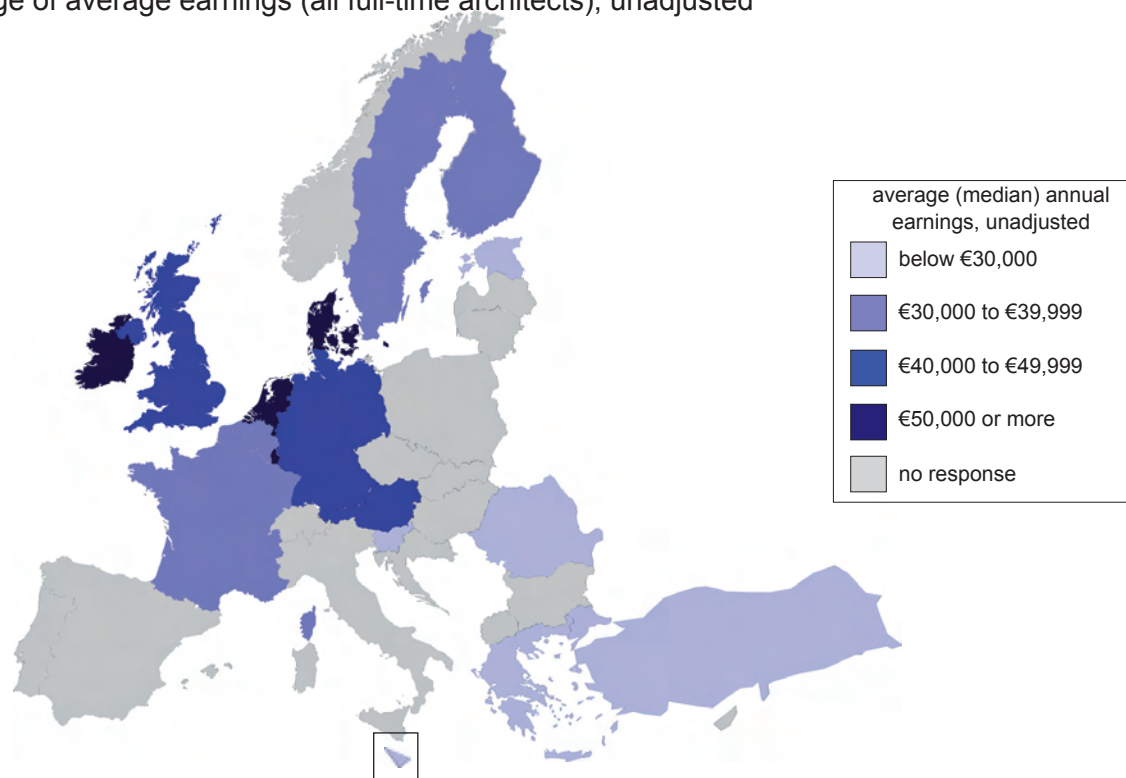


TABLE 4-1
Average earnings of full-time Architects analysed by country

€'s	average earnings	
	adjusted for PPP	unadjusted
Austria	47,337	48,000
Belgium	28,222	30,000
Denmark	39,012	53,720
Estonia	36,084	25,800
Finland	32,327	39,600
France	33,241	36,000
Germany	38,797	40,000
Greece	26,846	24,000
Ireland	52,209	65,000
Luxembourg	44,484	50,000
Malta	34,447	25,250
Netherlands	52,224	54,000
Romania	22,748	13,990
Slovenia	31,491	24,500
Sweden	29,990	35,178
Turkey	20,486	14,648
United Kingdom	45,014	49,650
EUROPE - 17*	35,570	36,686

* EUROPE - 17 'unadjusted' figure is a weighted average and takes account of the number of architects in each participating country

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



Earnings by Field of Employment

TABLE 4-2

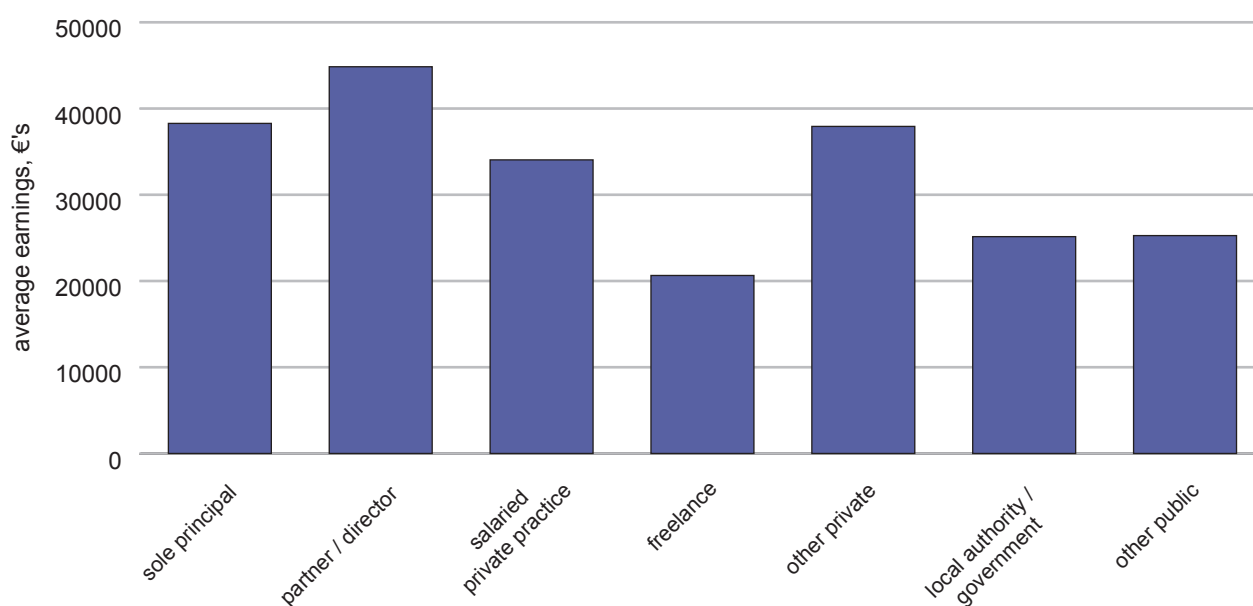
Average earnings analysed by country and field of employment (unadjusted)

€'s	sole principal	partner/director	ALL Principals	private practice salaried	freelance	other private	ALL private	local / central gov't	other public	ALL public
Austria	50,000	40,000	48,000	n/a	n/a	n/a	47,460	n/a	n/a	n/a
Belgium	30,600	24,000	30,000	24,000	30,000	31,000	30,000	28,500	n/a	33,734
Denmark	67,150	53,720	67,150	53,720	n/a	46,736	53,720	53,720	30,218	53,720
Estonia	41,280	25,800	27,735	n/a	n/a	n/a	25,800	n/a	n/a	n/a
Finland	35,000	49,250	42,000	36,000	n/a	36,500	39,800	45,000	42,500	45,000
France	29,000	42,000	30,000	46,800	35,000	37,200	35,500	n/a	n/a	39,585
Germany	40,000	46,300	40,000	36,000	35,000	48,000	40,000	45,000	50,500	47,000
Greece	30,000	30,000	30,000	18,000	20,000	22,500	24,000	21,500	30,083	26,000
Ireland	75,000	80,000	77,500	60,000	n/a	72,500	65,000	70,000	60,000	66,000
Luxembourg	57,000	45,000	50,000	90,000	n/a	50,000	50,000	n/a	n/a	n/a
Malta	51,000	42,000	42,000	20,000	25,000	n/a	25,250	n/a	n/a	25,000
Netherlands	45,144	103,500	72,500	42,000	n/a	n/a	52,000	n/a	n/a	n/a
Romania	16,788	26,889	22,384	11,472	14,943	10,912	13,990	11,192	11,836	11,514
Slovenia	33,000	26,000	30,000	16,500	12,000	15,600	24,000	17,000	n/a	34,000
Sweden	38,376	44,772	42,640	34,347	31,980	5,010	35,178	34,538	43,706	35,178
Turkey	26,366	26,366	26,366	13,988	17,577	11,952	14,648	14,062	10,546	11,718
United Kingdom	50,992	58,373	56,360	46,966	n/a	67,095	49,650	n/a	n/a	n/a
EUROPE - 17*	38,227	44,847	40,292	34,047	20,641	37,927	36,953	25,124	25,266	30,742

* EUROPE - 17 figure is a weighted average and takes account of the number of architects in each participating country
Earnings data converted from local currencies to Euros, exchange rate as at 01.09.08

CHART 4-3

Earnings by field of employment (unadjusted)



The highest earning group of architects is Partners / Directors. Their average earnings, at €44,847, is 17 per cent higher than that of the second highest earners, Sole Principals.

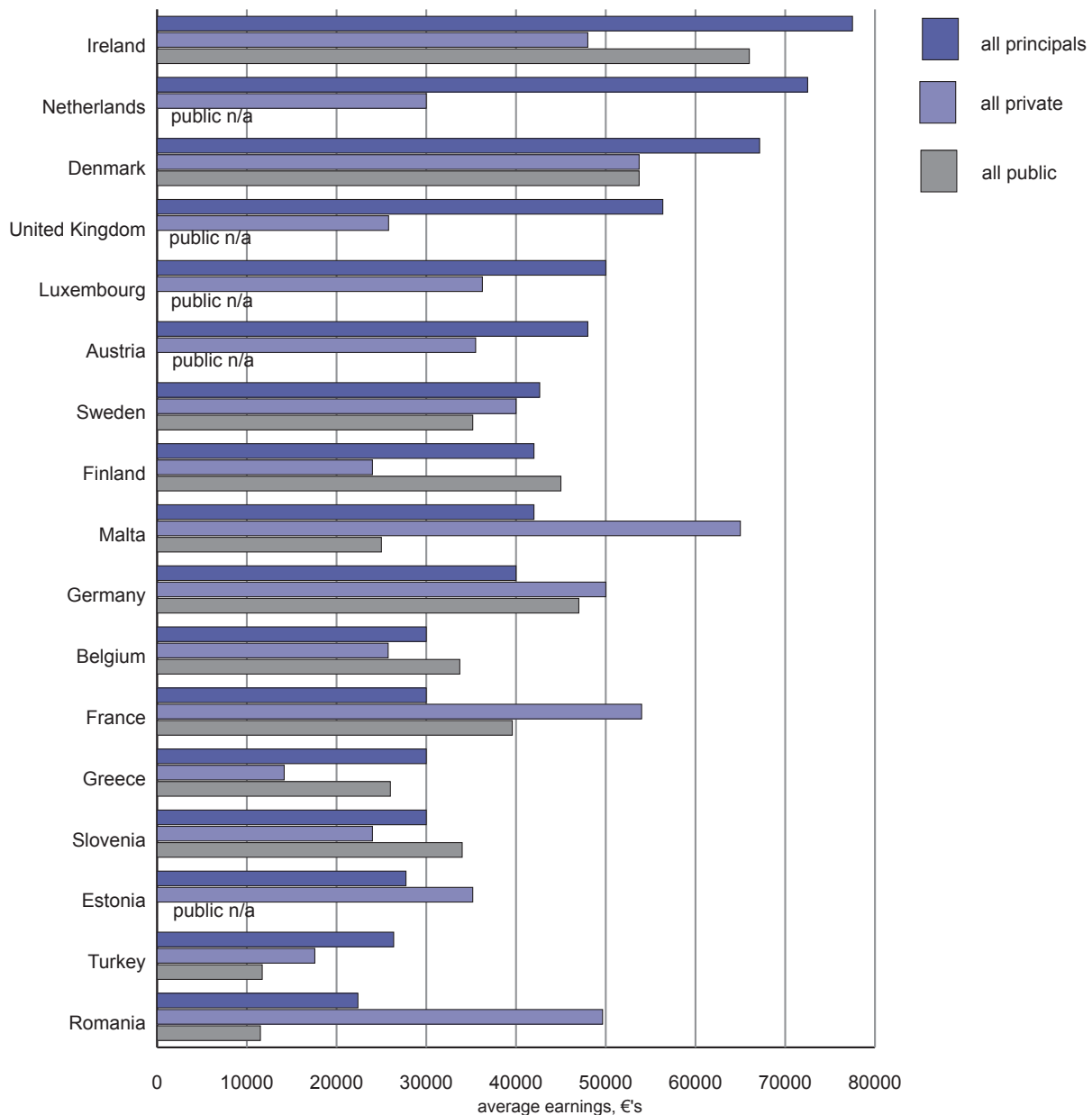
Salaried Architects in private practice earn an average of €34,047, some 24 per cent below that of Partners & Directors.

The average earnings of architects in Local Central Government, at €25,124, is 26 per cent lower than that of Salaried Architects in private practice.

This relative pattern of earnings is not repeated in every country. Although sample sizes mean data should be considered with caution, there are several countries – Austria, Belgium, Denmark, Estonia, Luxembourg, Malta and Slovenia – where the average earnings of Sole Principals is greater than that of Partners & Directors. And in Denmark the average earnings of architects in Local Authorities and Central Government are the same as Partners & Directors in private practice.

CHART 4-4

Comparisons of average earnings of all Principals and all Public Architects (unadjusted)



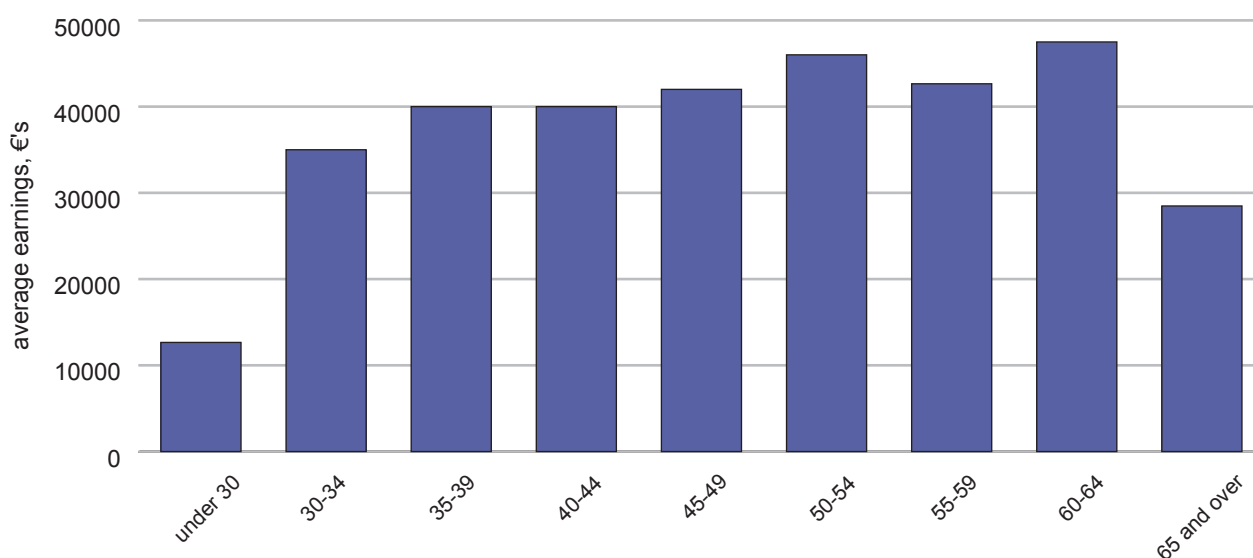
Earnings by Age

Average earnings clearly rise in line with an architect's age. In fact the relationship between earnings and age is so strong that earnings rise in all but one age group, to reach a peak value at age 60-64. Average earnings are lowest for architects aged below 30, and 65 or over. The differential in the average earnings comparing the age group 30 to 34 with age group 60 to 64 is 36 per cent.

TABLE 4-3
Average earnings analysed by age (unadjusted)

	lower quartile	MEDIAN	upper quartile
<30	3,250	12,655	23,436
30-34	19,800	35,000	48,000
35-39	22,000	40,000	55,000
40-44	24,000	40,000	60,000
45-49	23,436	42,000	64,205
50-54	22,000	46,007	70,000
55-59	22,875	42,650	63,091
60-64	25,000	47,500	86,713
65+	14,512	28,480	39,343

CHART 4-5
Average earnings by age (unadjusted)



Earnings by Gender

The survey results show a dramatic difference in the earnings between men and women. Male full-time architects record average earnings – across all employment types and across all countries – of €39,600. For female architects, the full-time average is €23,436. This is a differential between men and women of 41 per cent.

There is also a substantial, though smaller, differential among part-time architects. Here, the difference between men and women is 14 per cent. The average earnings figures here take account of the number of hours worked, so part-time working has been converted to full-time equivalent (FTE) before reaching the average figure.

CHART 4-6
Average earnings of male and female Architects (unadjusted)

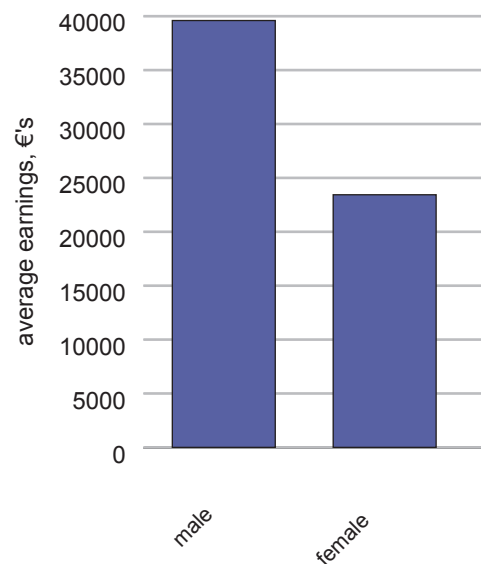


TABLE 4-4
Average earnings analysed by gender and full-time or part-time working (unadjusted)

€'s		lower quartile	MEDIAN	upper quartile
Full time	male	22,800	39,600	60,000
	female	10,546	23,436	40,000
Part time FTE	male	17,271	31,250	55,179
	female	15,000	26,786	42,262
Part time NOT FTE	male	10,000	20,072	35,038
	female	7,073	16,000	27,000

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

Retirement

TABLE 4-5

At what age Architects expect to retire, analysed by country

per cent	under 50	50-54	55-59	60-64	65-69	70-74	75-79	80-84	85 or over	never
Austria	0	0	0	9	35	32	8	4	2	11
Belgium	1	1	8	24	39	9	3	3	1	11
Denmark	1	0	2	25	48	14	2	1	0	8
Estonia	4	0	0	12	12	36	8	0	4	24
Finland	0	0	3	44	41	3	1	0	1	4
France	0	0	7	24	40	13	5	0	1	10
Germany	0	0	2	19	54	13	3	1	1	7
Greece	0	2	8	25	35	8	3	1	3	15
Ireland	1	3	8	25	33	12	2	1	1	13
Luxembourg	0	3	7	29	29	8	3	0	1	20
Malta	4	3	8	46	26	5	3	0	0	3
Netherlands	1	1	7	20	35	14	4	1	2	16
Romania	2	4	9	21	21	12	3	2	3	24
Slovenia	0	0	2	22	32	16	2	0	0	26
Sweden	0	0	1	19	63	8	2	2	1	4
Turkey	11	17	19	16	11	4	1	1	1	19
United Kingdom	2	3	5	27	32	16	2	0	2	12
EUROPE - 17	3	4	7	20	39	11	3	1	1	12

CHART 4-7

Age at which Architects expect to retire

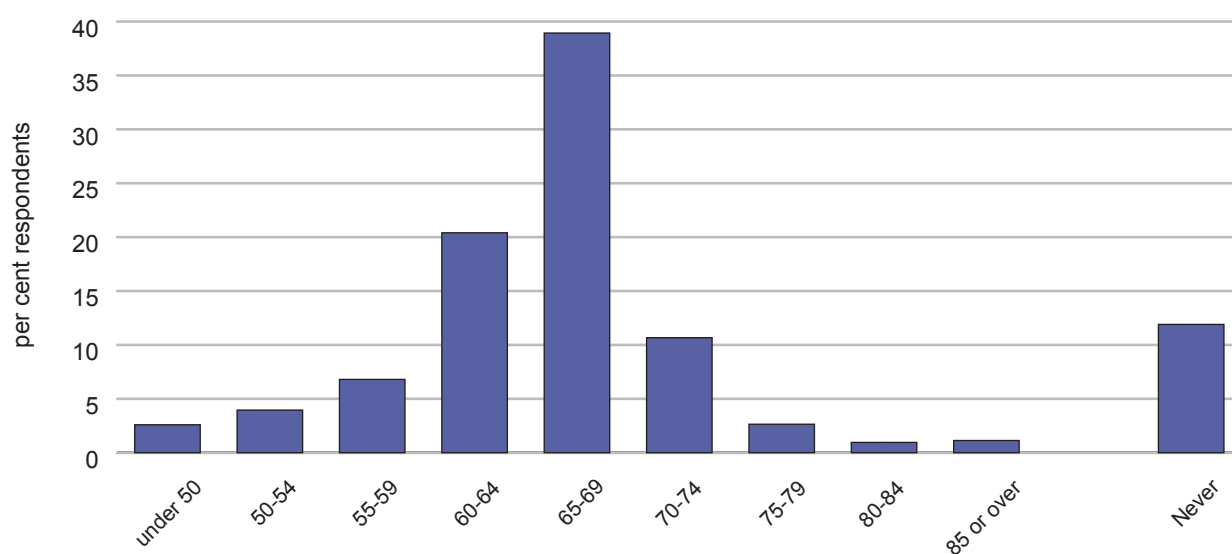
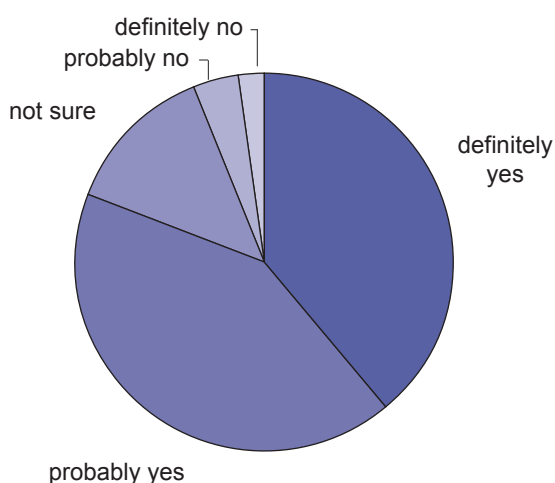


TABLE 4-6
Whether Architects will continue to work as an Architect until they retire

per cent	definitely yes	probably yes	not sure	probably no	definitely no
Austria	48	46	5	0	1
Belgium	25	45	23	4	3
Denmark	36	48	10	5	1
Estonia	43	57	0	0	0
Finland	32	55	8	4	1
France	22	55	17	4	2
Germany	32	43	17	6	2
Greece	51	37	9	2	1
Ireland	40	46	9	4	1
Luxembourg	26	61	7	1	4
Malta	28	48	11	10	2
Netherlands	55	35	7	1	2
Romania	55	35	7	2	1
Slovenia	32	60	6	1	1
Sweden	39	48	8	3	2
Turkey	49	35	12	3	1
United Kingdom	33	50	8	6	3
EUROPE - 17	39	42	13	4	2

CHART 4-8
Likelihood of continuing to work as an Architect until retirement



The highest proportion of architects expect to retire between the ages of 65 and 69. Thirty nine per cent say they expect to retire at this age. Half as many, 20 per cent, plan to retire earlier at age 60-64. Fourteen per cent expect to retire younger than 60, while 16 per cent expect to remain working until they are at least 70. However, 12 per cent – one in eight architects – say they will ‘never’ retire.

Most architects will ‘definitely’ or ‘probably’ remain working as an architect until they retire. Thirteen per cent are not sure, while 6 per cent will ‘probably’ or ‘definitely’ change career before retiring.

Hours Worked

TABLE 4-7

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

per cent	sole principal	partner / director	private practice salaried	freelance	other private	local / central government	other public
Austria	54.0	51.3	48.8	n/a	n/a	n/a	n/a
Belgium	53.5	58.3	49.8	45.1	48.8	43.0	45.0
Denmark	44.3	47.0	39.5	40.0	40.1	40.1	40.7
Estonia	56.0	45.3	43.8	n/a	40.0	n/a	n/a
Finland	44.9	43.3	37.9	38.8	39.1	39.0	40.5
France	49.0	51.4	48.3	48.5	46.6	37.0	47.4
Germany	51.5	51.8	46.1	46.9	47.1	43.0	44.6
Greece	54.2	50.3	44.0	48.2	44.8	44.9	44.6
Ireland	44.6	50.3	41.9	40.0	48.8	40.6	39.4
Luxembourg	50.0	49.6	47.6	46.6	47.1	43.7	45.0
Malta	57.1	54.1	45.8	48.8	50.0	46.9	48.8
Netherlands	48.0	47.3	46.2	42.0	47.3	50.0	51.7
Romania	51.5	50.5	45.6	50.8	46.2	45.8	48.3
Slovenia	47.6	48.9	45.7	45.1	41.4	44.0	50.0
Sweden	43.7	41.8	41.7	38.0	42.5	42.1	42.9
Turkey	49.3	48.9	49.7	46.6	50.6	40.9	41.4
United Kingdom	47.5	45.3	42.3	n/a	42.3	37.0	37.5
EUROPE - 17	51.0	50.1	46.0	47.0	46.6	42.2	43.3

The highest number of hours worked is recorded by Sole Principals (51 hours per week) closely followed by Partners & Directors (50 hours per week). Their salaried colleagues in private practice work an average of 46 hours per week. Architects working in the public sector have a shorter working week than in the private sector, although average hours are still 42 (Local Authorities and Central Government) or 43 hours (other public).

The longest working hours per week for Partners & Directors are recorded in Belgium (58 hours) and Malta (54 hours); longest working hours for private practice salaried architects are in Belgium, Austria, France and Turkey (each over 48 hours).

Architects in all employment areas report they work longer hours than their contract demands. Freelance architects report the highest mismatch, working 7 hours longer per week than they are contracted to; 'Other Private' architects work 6 hours longer than contracted. Salaried

TABLE 4-8

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
private practice salaried	+4.6
freelance	+7.1
other private	+6.0
local / central government	+2.7
other public	+4.2
EUROPE - 17	+4.9

Architects in private practice work 5 hours longer. Public sector architects work 3 hours (Local Authority / Central Government) and 4 hours ('other' public) longer than contracted to.

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).

The greatest satisfaction is recorded for the choice of architecture as a career; the average score here is 7.7 out of 10. Next highest is satisfaction with the business environment – colleagues, fellow professionals, public planning bodies and so on. Quality of life scores 5.9 on the scale, while least satisfaction of any criteria measured – with a score of 4.7 – is the amount architects are paid.

In answers to all questions, the highest satisfaction levels are recorded by public sector architects, and the lowest by Principals / Directors in private practice. Geographically, architects in the Scandinavian countries and the Netherlands consistently record the highest satisfaction levels. For example, quality of life is rated between 7.7 and 7.9 in Denmark, Sweden and the Netherlands; well above the average 5.9 across Europe.

Architects in no single country consistently report lowest satisfaction ratings, but those in Germany and Turkey have the lowest quality of life rating (5.5). Least satisfaction with pay is reported in Germany, Austria and Belgium.

CHART 4-9
Professional satisfaction, ranked, highest first

satisfaction with ...

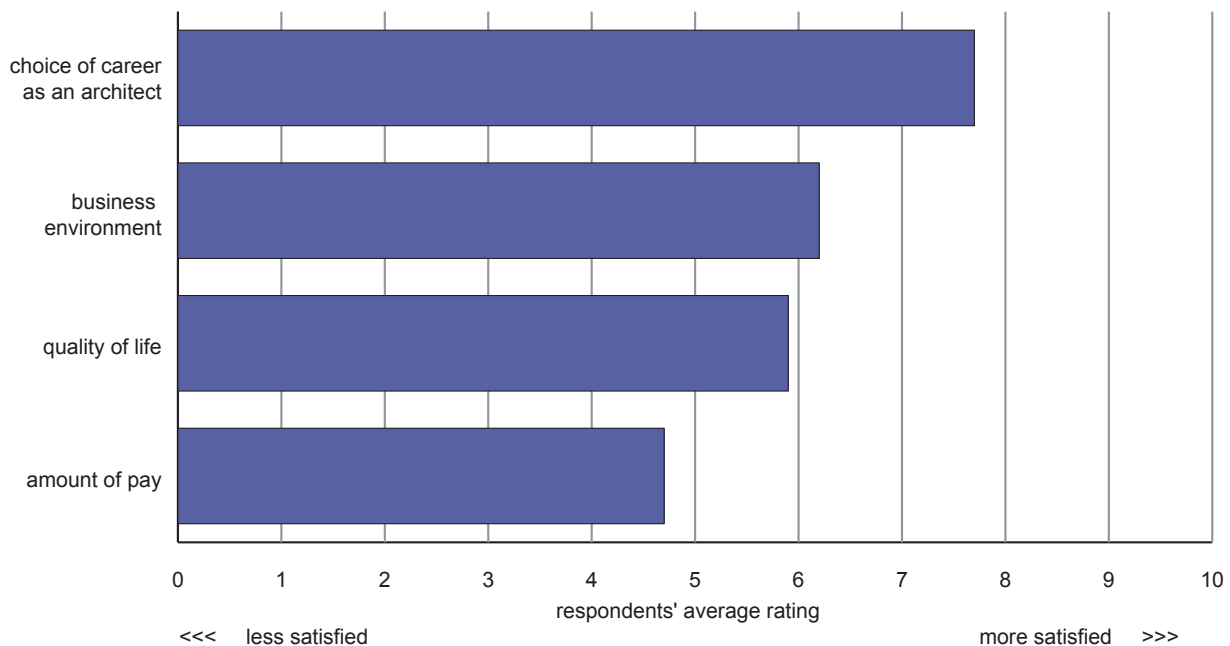


TABLE 4-9

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

score, 0 to 10	field of employment			ALL
	principal / director	other private	public	
Austria	8.2	7.1	n/a	8.2
Belgium	7.4	7.1	7.0	7.2
Denmark	8.5	8.4	8.2	8.4
Estonia	8.3	8.3	n/a	8.3
Finland	8.2	7.5	8.3	8.0
France	7.3	7.4	6.6	7.4
Germany	7.6	7.2	7.4	7.4
Greece	8.3	7.8	7.8	7.9
Ireland	7.7	8.0	8.2	7.9
Luxembourg	7.3	7.6	8.0	7.5
Malta	8.4	7.7	7.0	7.7
Netherlands	8.3	8.1	8.4	8.3
Romania	8.8	8.2	8.0	8.4
Slovenia	8.0	8.0	6.5	7.9
Sweden	8.7	7.8	8.2	8.1
Turkey	8.1	7.6	7.8	7.8
United Kingdom	7.7	7.0	7.5	7.2
EUROPE - 17	7.8	7.6	7.7	7.7

CHART 4-10

Satisfaction with choice of architecture as a career

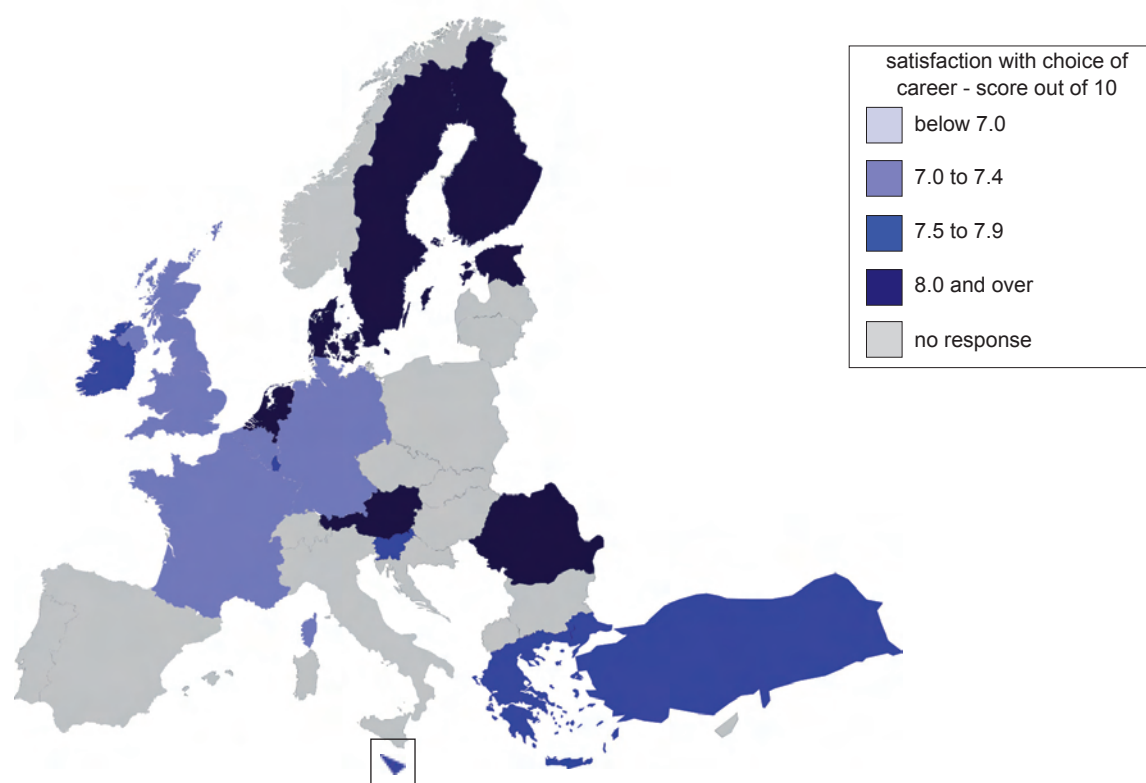


TABLE 14-10

Satisfaction with the amount you are paid analysed by country and field of employment

score, 0 to 10	field of employment			ALL
	principal / director	other private	public	
Austria	4.2	3.9	n/a	4.2
Belgium	4.2	4.1	5.6	4.3
Denmark	6.4	7.2	6.3	6.8
Estonia	6.0	6.0	n/a	6.0
Finland	5.9	5.5	6.5	6.0
France	3.9	4.7	5.3	4.5
Germany	3.7	4.3	5.3	4.1
Greece	5.5	5.1	4.3	5.1
Ireland	5.3	6.2	5.8	5.8
Luxembourg	4.6	5.8	9.2	5.5
Malta	5.6	5.2	4.2	5.1
Netherlands	6.4	5.9	6.2	6.3
Romania	6.6	5.7	5.2	6.0
Slovenia	5.8	5.9	4.0	5.7
Sweden	6.4	5.9	6.2	6.1
Turkey	5.0	4.6	4.3	4.7
United Kingdom	4.8	5.1	5.3	5.0
EUROPE - 17	4.4	4.9	5.2	4.7

CHART 4-11

Satisfaction with amount paid

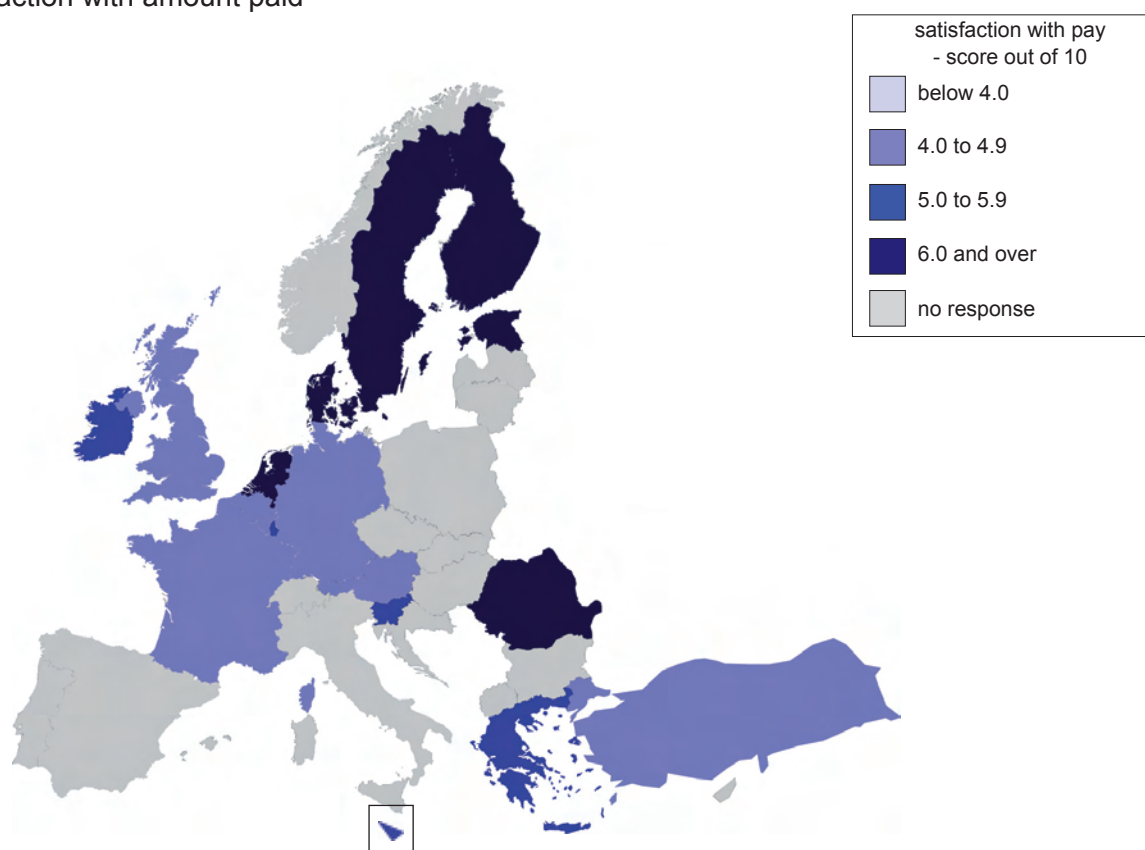


TABLE 4-11
Satisfaction with your quality of life analysed by country and field of employment

score, 0 to 10	field of employment			ALL
	principal / director	other private	public	
Austria	6.0	5.3	n/a	6.0
Belgium	5.9	5.7	6.6	5.8
Denmark	8.0	7.8	8.0	7.9
Estonia	6.7	6.6	n/a	6.6
Finland	7.1	7.3	8.0	7.5
France	5.8	6.1	6.7	6.1
Germany	5.3	5.5	6.2	5.5
Greece	6.5	5.9	5.8	6.0
Ireland	6.5	6.8	6.8	6.7
Luxembourg	6.1	6.4	8.8	6.4
Malta	6.4	6.3	5.7	6.2
Netherlands	7.7	7.5	8.0	7.7
Romania	6.9	6.4	6.2	6.6
Slovenia	6.2	7.0	5.8	6.6
Sweden	8.2	7.6	7.8	7.8
Turkey	5.9	5.3	5.5	5.5
United Kingdom	6.2	5.9	7.0	6.1
EUROPE - 17	5.8	5.9	6.4	5.9

CHART 4-12
Satisfaction with quality of life

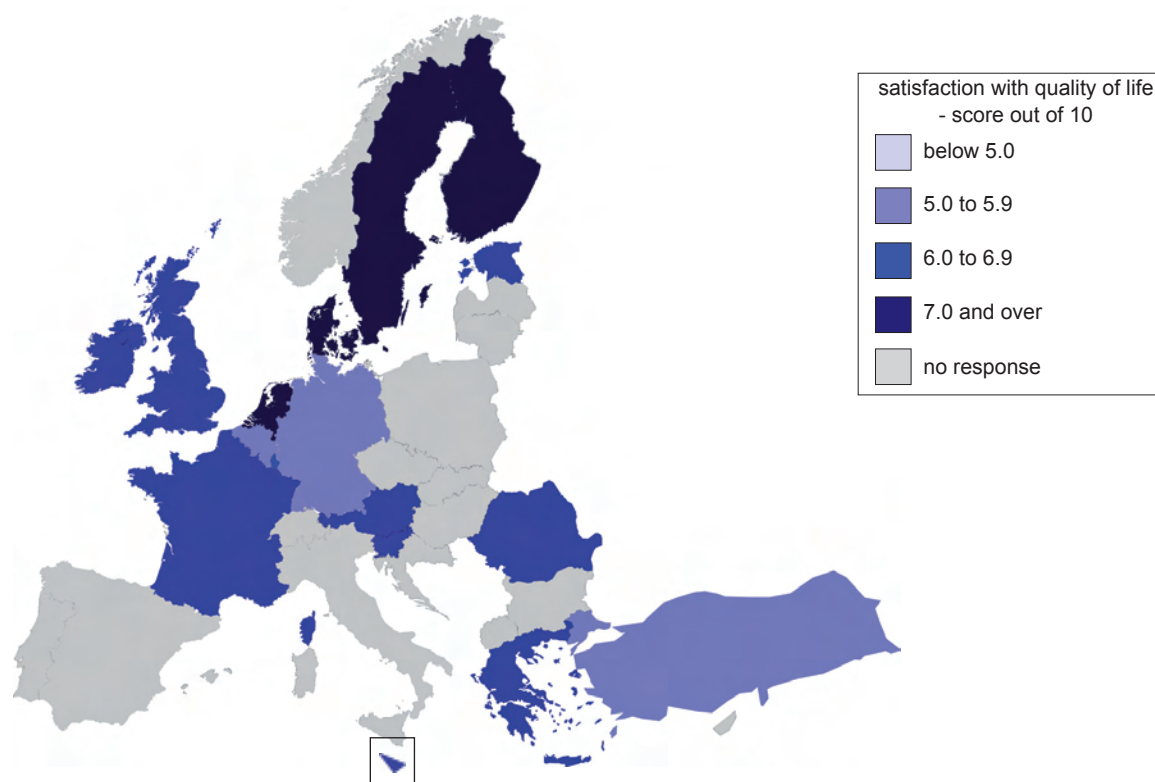


TABLE 4-12

Satisfaction with the business environment in which you work - including your colleagues, your fellow professionals, public planning bodies etc. - analysed by country and field of employment

score, 0 to 10	field of employment			ALL
	principal / director	other private	public	
Austria	6.1	6.1	n/a	6.1
Belgium	6.5	6.5	6.7	6.5
Denmark	7.6	7.3	7.5	7.4
Estonia	6.9	6.0	n/a	6.7
Finland	6.7	7.0	7.4	7.0
France	6.4	6.2	6.3	6.3
Germany	5.6	6.6	6.6	6.1
Greece	6.6	6.5	5.7	6.4
Ireland	6.0	6.3	7.0	6.3
Luxembourg	6.0	6.7	8.0	6.5
Malta	6.0	6.7	5.8	6.3
Netherlands	7.6	6.9	7.5	7.5
Romania	6.8	6.7	6.6	6.7
Slovenia	6.2	6.9	4.8	6.5
Sweden	7.7	7.0	7.1	7.1
Turkey	6.0	5.8	5.5	5.8
United Kingdom	6.7	6.1	5.4	6.2
EUROPE - 17	6.0	6.4	6.4	6.2

CHART 4-13

Satisfaction with the business environment

