

Vijeće arhitekata Europe i arhitektonske usluge u EU

DUBRAVKO BAČIĆ

Vijeće arhitekata Europe (ACE)

ACE - CAE „EU“

VIJEĆE ARHITEKATA EUROPE (ACE)

- > 27 DČ + 6 DČ promatrači + 3 poseban status
- > 620.000 arhitekata u 36 država
- > 52 organizacije članice – nacionalne strukovne organizacije i profesionalna udruženja u državama članicama EU, državama pristupnicama i državama s posebnim statusom (NO, CH, UK)

TIJELA I ORGANIZACIJA

- > Generalna skupština (2 x god.)
- > Predsjednik i Upravni odbor (11 članova, 2-godišnji mandat)
- > Tajništvo (ACE ured u Bruxellesu)
- > tematska područja (4) > tematske radne grupe (12+2)

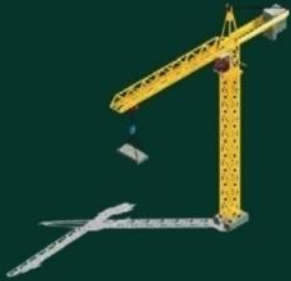
The Architectural Profession in Europe

2022 Sector Study



COUNTRIES PARTICIPATING IN THE 2022 SURVEY





€2513 billion
Value of construction market



€21 billion
Value of architectural market



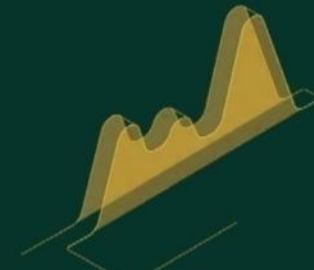
+24%
Market increase since 2020



56%
Private housing work



62%
Building design work



-10
Future sentiment is
not confident

Architects produce €21 billion worth of work

Architects contribute €21 billion to Europe's economy

Total value of private practice fee income.
Up by 24% since 2020.

Sustainable architecture

46% of architects 'frequently' design Low Energy buildings.

Private housing is the most important sector

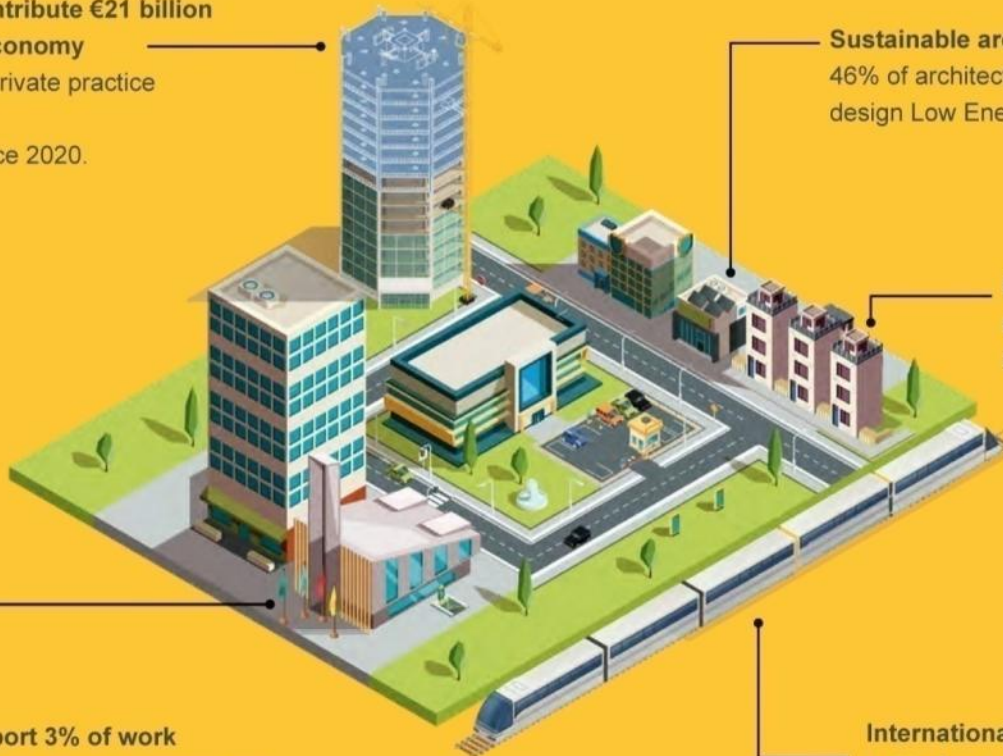
89% of architectural practices are involved in designing private housing which provides 56% of average practice turnover.

Architects export 3% of work

Proportion of work which is international.

International perspective

21% of architects were educated in another country. 19% have seriously considered working in another country.





620 000

Total number of architects



46%

Female architects



32%

Aged under 40



82%

Employed full-time



24%

Employees in private practice



47%

Partners, Directors,
Sole Principals



150 000

Total number of practices



€237 000

Average revenue per practice
3-5 staff size



€65

Hourly rate for
Partners & Directors



7%

Of practices work
in another European country
last 12 months



92%

Of practices have
Professional Indemnity Insurance



42%

Success rate for
public sector Architectural
Design Competitions



+6%

Average earnings have increased



€46 800

Average earnings for
Partners & Directors



47

Weekly hours worked
by Partners & Directors



21%

Studied in another country



7%

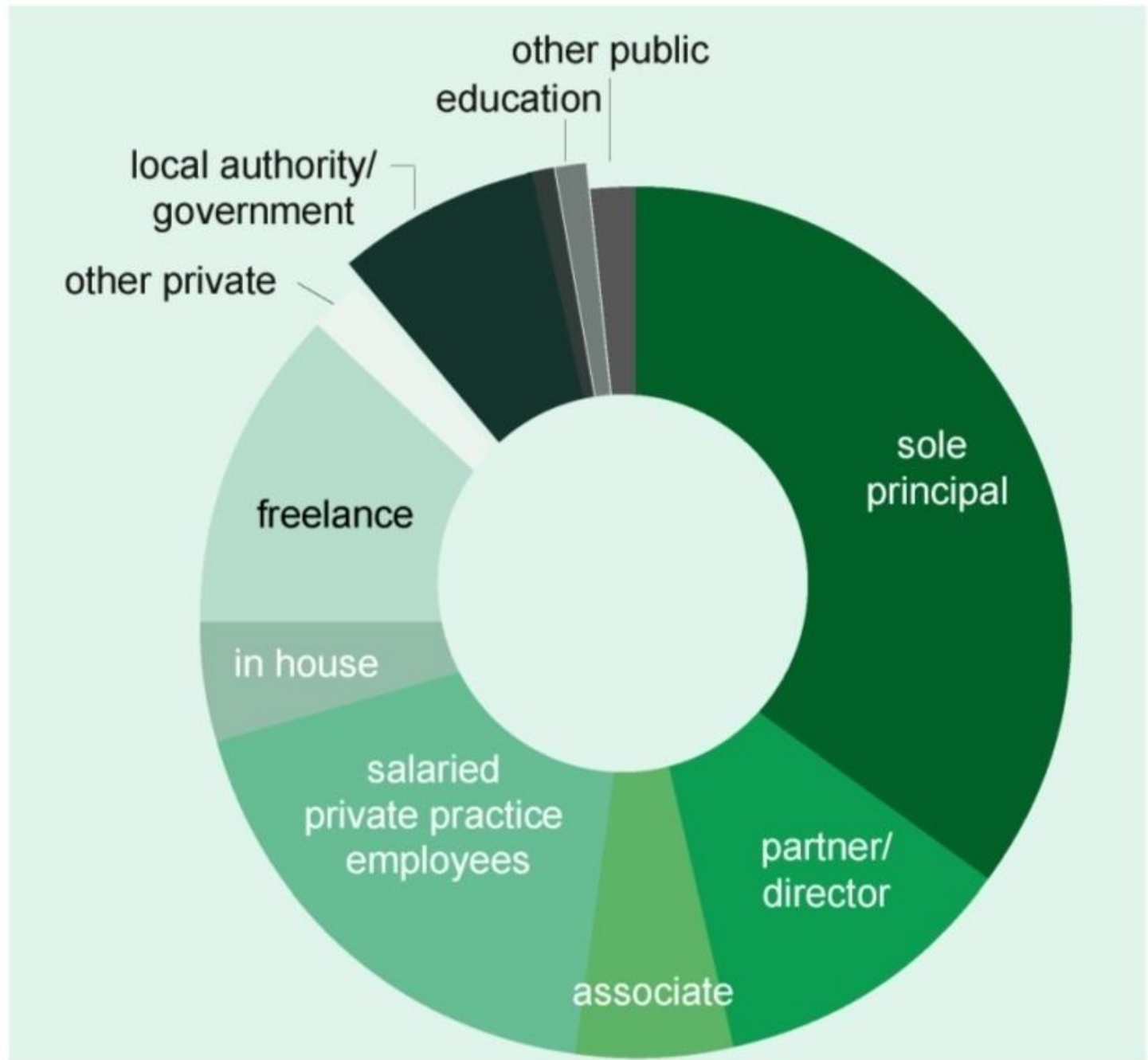
Worked in another European
country
in the last 12 months



20

Hours CPD per year

FIELD OF EMPLOYMENT



MAIN EMPLOYMENT FIELD BY COUNTRY

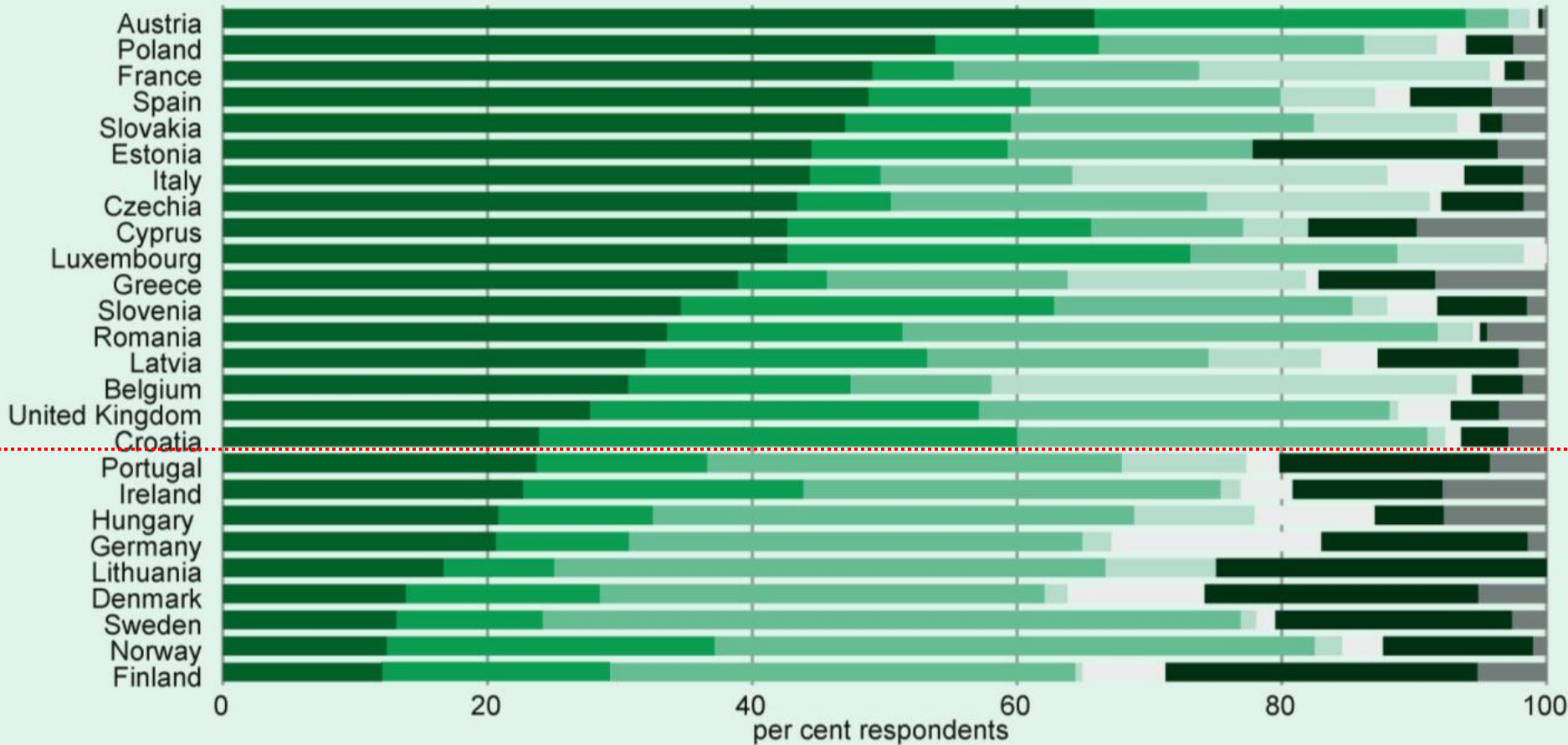
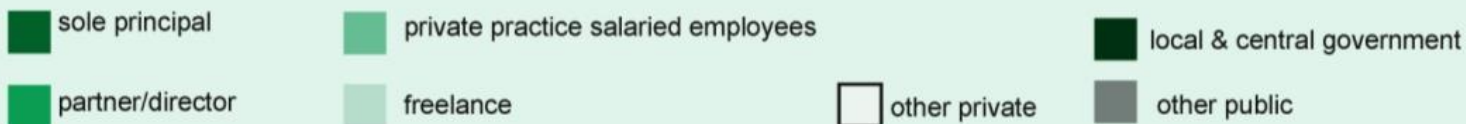


TABLE 2-5
PROPORTION OF MARKET AND INVOLVEMENT
BY BUILDING SECTOR

per cent	per cent of revenue	per cent of practices involved
private housing	56	89
offices	3	15
retail	9	34
leisure and the arts	3	15
industrial	4	16
health	6	23
education	3	14
public housing	7	21
other private	6	27
other public	3	11

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

CHART 2-8
PROPORTION OF MARKET BY BUILDING SECTOR

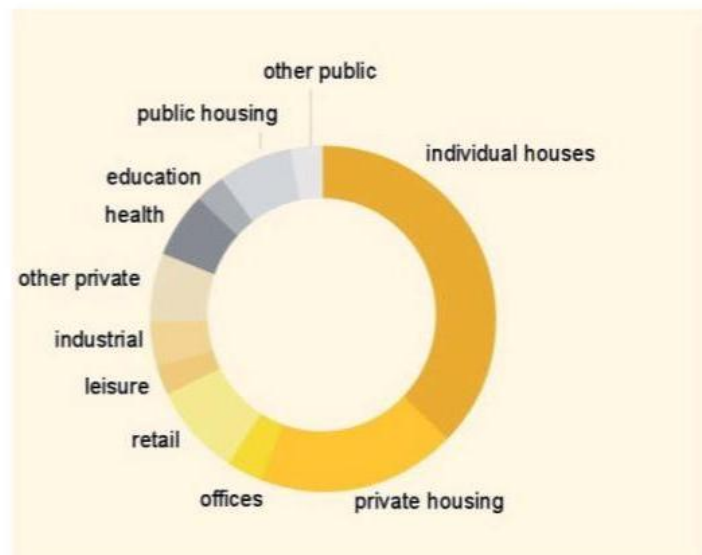


TABLE 2-4
PROPORTION OF MARKET
BY BUILDING TYPE ANALYSED BY COUNTRY

per cent	new build	heritage	other refurbishment
Austria	53	9	38
Belgium	47	12	39
Croatia	66	19	15
Cyprus*	81	6	13
Czechia	56	16	30
Denmark	35	40	24
Estonia	n/a	n/a	n/a
Finland	63	16	21
France	39	14	48
Germany	47	13	40
Greece	52	3	44
Hungary*	63	15	23
Ireland	48	20	32
Italy	16	33	50
Latvia*	41	28	31
Lithuania	n/a	n/a	n/a
Luxembourg	62	16	23
Norway	63	9	28
Poland	70	8	21
Portugal	53	20	27
Romania	72	7	21
Slovakia	61	10	28
Slovenia	65	11	24
Spain	47	12	40
Sweden	57	10	33
United Kingdom	43	17	40
2022 EUROPE-26	50	13	36
2020 EUROPE-26	44	14	43
2018 EUROPE-26	41	59	
2016 EUROPE-27	41	59	
2014 EUROPE-26	37	63	
2012 EUROPE-25	n/a	n/a	

* caution - small sample

TABLE 2-6
PROPORTION OF MARKET BY BUILDING SECTOR ANALYSED BY COUNTRY

per cent	individual houses extensions loft conversions	private housing	offices	retail	leisure	industrial	health	education	public housing	other private	other public	TOTAL
Austria	33	15	11	7	2	2	3	4	6	6	11	100
Belgium	62	13	3	4	4	2	3	1	3	3	2	100
Croatia	46	19	2	1	1	7	3	2	3	6	10	100
Cyprus*	47	11	0	7	1	10	2	2	4	10	6	100
Czechia	36	11	2	10	3	2	6	0	10	4	17	100
Denmark	24	10	9	14	4	1	0	1	7	6	24	100
Estonia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	23	15	10	10	7	2	5	2	5	8	13	100
France	42	14	6	6	4	3	4	3	5	5	8	100
Germany	31	23	2	11	2	5	7	4	10	7	0	100
Greece	62	6	0	6	2	1	3	2	2	11	5	100
Hungary*	23	17	2	8	8	11	8	4	11	2	6	100
Ireland	43	9	6	7	5	3	4	3	6	8	5	100
Italy	46	16	2	2	4	3	6	1	2	15	4	100
Latvia*	38	9	15	6	3	1	5	9	2	11	1	100
Lithuania	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Luxembourg	44	19	5	7	2	3	1	1	11	2	5	100
Norway	36	17	1	5	14	6	7	2	7	2	3	100
Poland	37	20	5	6	3	1	11	3	2	4	8	100
Portugal	61	9	1	4	5	2	4	2	1	7	3	100
Romania	44	12	7	5	7	2	10	1	2	4	6	100
Slovakia	37	5	16	7	4	6	5	2	3	5	10	100
Slovenia	49	7	2	13	2	1	9	3	5	5	5	100
Spain	48	16	2	4	3	1	4	3	2	8	8	100
Sweden	25	16	2	11	5	7	5	2	7	8	13	100
United Kingdom	52	12	5	4	1	6	4	3	2	6	5	100
2022 EUROPE-26	37	19	3	9	3	4	6	3	7	6	3	100
2020 EUROPE-26	35	19	9	4	4	6	3	7	3	6	5	100
2018 EUROPE-26	36	18	8	5	4	6	3	6	3	8	4	100
2016 EUROPE-27	39	16	7	7	4	5	3	4	2	9	6	100
2014 EUROPE-26	40	13	6	6	3	6	3	5	3	7	9	100
2012 EUROPE-25	42	9	6	6	3	5	2	4	3	9	11	100

* caution - small sample

CHART 2-9
PROPORTION OF MARKET IN EACH MAIN BUILDING SECTOR RANKED IN ORDER OF HIGHEST PRIVATE HOUSING WORK

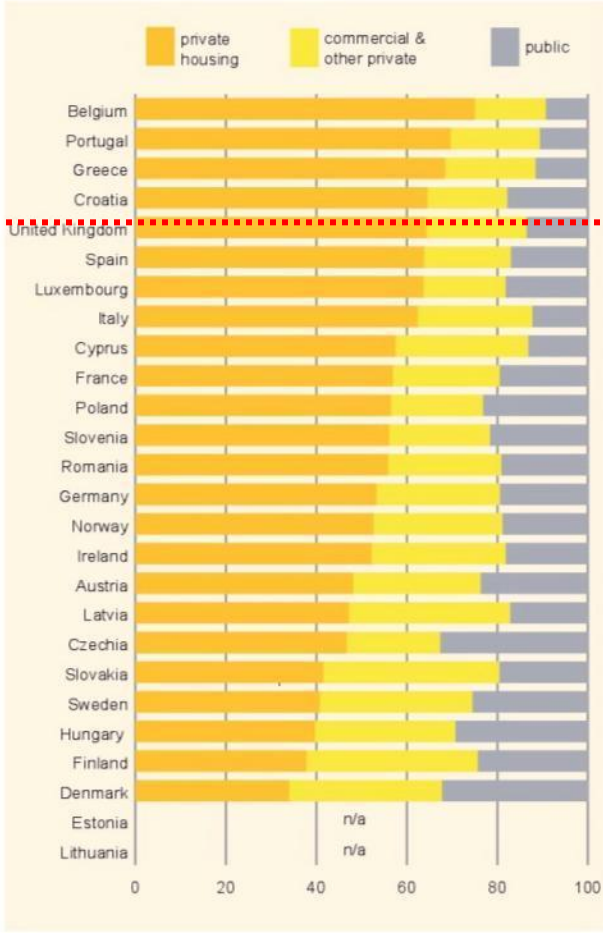


CHART 2-10

PROPORTION OF MARKET BY TYPE OF SERVICE

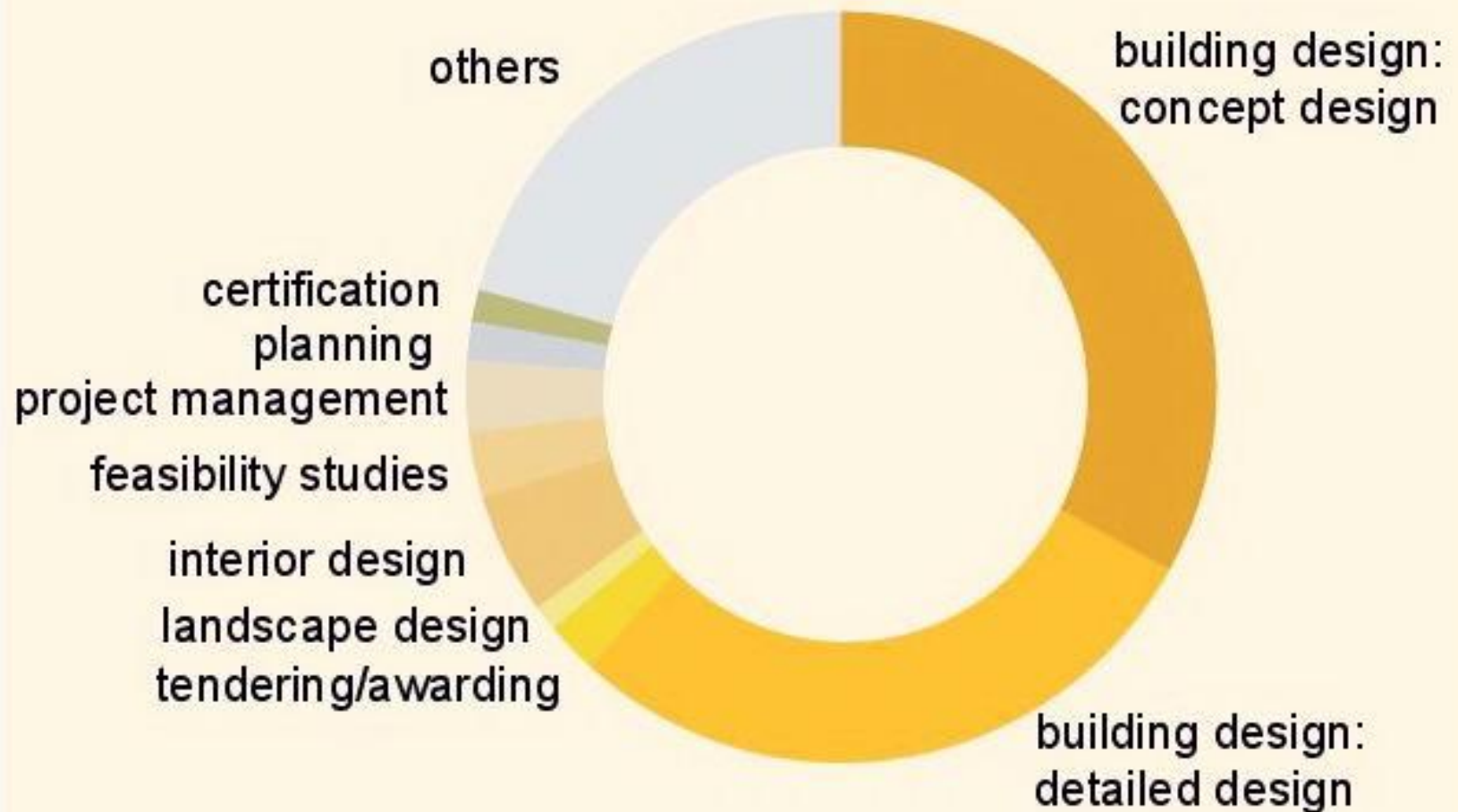


TABLE 2-7
PROPORTION OF MARKET UNDERTAKEN BY EACH SERVICE TYPE

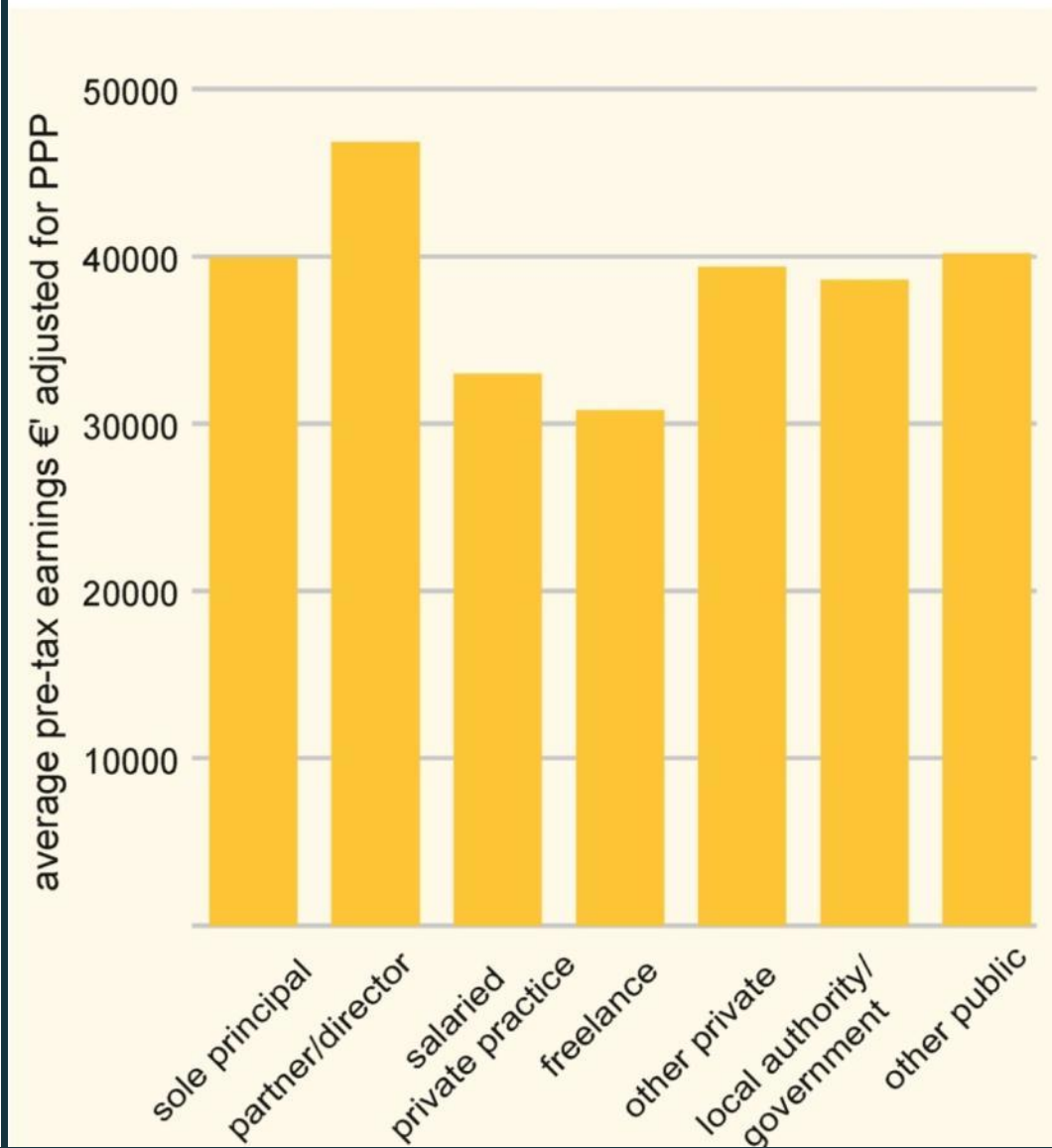
per cent	building design		tendering/ awarding of contract	landscape design	interior design	feasibility studies	project manage- ment	urban planning	certification	property valuation	BIM co-ordination	other service	TOTAL
	concept design	detailed design											
Austria	27	44	3	1	2	6	3	2	3	1	0	7	100
Belgium	36	35	9	1	6	3	6	1	0	0	0	3	100
Croatia	28	46	2	4	7	0	3	3	1	0	0	4	100
Cyprus*	30	29	11	5	6	0	9	2	2	0	0	7	100
Czechia	24	39	6	6	9	0	6	6	0	1	1	2	100
Denmark	22	21	8	8	3	1	5	1	1	0	10	18	100
Estonia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Finland	31	41	4	0	7	2	5	8	0	0	1	2	100
France	44	28	3	1	7	7	4	1	0	0	0	4	100
Germany	34	21	0	1	4	2	2	1	1	1	0	32	100
Slovakia	23	42	3	3	10	2	6	8	0	0	1	1	100
Slovenia	23	39	4	2	8	4	9	5	0	1	0	4	100
Spain	28	37	6	1	5	3	6	3	4	2	0	5	100
Sweden	30	27	3	1	7	6	4	7	1	0	0	13	100
United Kingdom	29	38	11	1	3	8	2	2	1	0	0	5	100
2022 EUR-26	33	29	2	1	5	3	3	2	1	1	0	20	100
2020 EUR-26	31	25	n/a	1	6	3	5	2	2	2	0	22	100
2018 EUR-26	67		n/a	2	10	3	4	3	2	2	n/a	7	100
2016 EUR-27	62		n/a	2	11	3	4	3	3	2	n/a	9	100
2014 EUR-26	57		n/a	3	11	4	5	4	4	2	n/a	11	100
2012 EUR-25	50		n/a	2	14	6	7	6	n/a	n/a	n/a	16	100

* caution - small sample

CHART 2-7
ESTIMATED VALUE OF ARCHITECTURAL MARKET



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



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



AVERAGE HOURLY CHARGE-OUT RATES FOR PRINCIPALS ADJUSTED FOR PPP

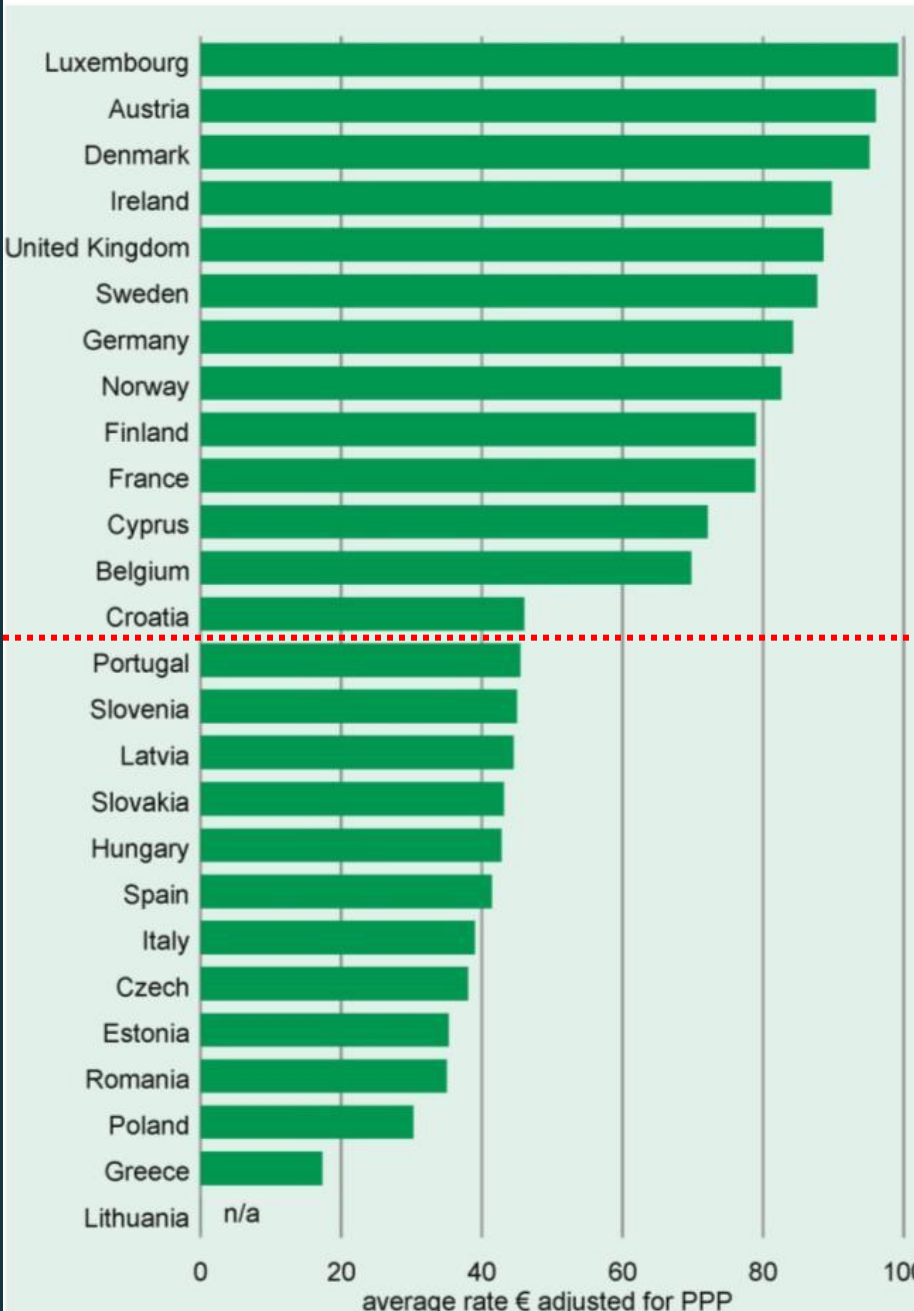


TABLE 3-4
HOW CHARGES ARE CALCULATED

per cent current jobs	method of calculating charge				
	per cent of contract value	lump sum	hourly charge	no charge agreed (effectively "at risk")	other method
Austria	51	22	21	1	5
Belgium	52	26	16	1	5
Croatia	29	31	10	5	25
Cyprus*	58	32	4	0	6
Czechia	20	51	18	2	8
Denmark	29	39	22	2	8
Estonia*	15	35	36	6	7
Finland	4	37	41	2	15
France	62	27	8	1	3
Romania	25	35	10	3	26
Slovakia	44	28	16	5	9
Slovenia	29	42	13	4	11
Spain	49	27	12	4	8
Sweden	3	33	58	3	3
United Kingdom	40	40	15	1	3
2022 EUROPE-26	35	27	15	3	19
2020 EUROPE-26	28	30	15	4	23
2018 EUROPE-26	32	28	13	3	25
2016 EUROPE-27	45	34	14	7	n/a
2014 EUROPE-26	47	32	14	7	n/a
2012 EUROPE-25	43	36	12	9	n/a

* caution - small sample

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

TABLE 3-5

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

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

€	average (median) hourly charge-out rates					
	adjusted for PPP			unadjusted for PPP		
	principals	architect employees	technologists	principals	architect employees	technologists
Austria	96	84	71	108	95	80
Belgium	70	61	52	80	70	60
Croatia	46	37	20	33	26	15
Cyprus*	72	50	28	65	45	25
Czechia	38	27	22	28	20	16
Denmark	95	86	81	134	121	116
Estonia*	35	41	26	30	35	23
Finland	79	70	51	100	89	65
France	79	70	57	90	80	65
Germany	84	70	59	90	75	60
Greece	17	12	12	15	10	10
Spain	41	31	19	55	29	18
Sweden	88	80	72	106	96	87
United Kingdom	89	74	59	107	89	72
2022 EUROPE-26	65	51	39	64	55	42
2020 EUROPE-26**	62	49	39	61	52	42
2018 EUROPE-26**	68	56	43	78	64	49
2016 EUROPE-27**	60	48	36	66	54	41
2014 EUROPE-26**	57	48	36	61	52	39
2012 EUROPE-25**	54	44	29	55	43	30

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 the OECD.

* caution - small sample

** revised and weighted

Social & Economic Social & Economique

construction / GDP previous year construction / PIB année précédente

	2012	2014	2016	2018	2020	2022
Population	4 398 150	4 246 700	4 190 669	4 105 493	4 058 165	4,036,355
GDP PIB € m	44 892	43 128	43 847	48 990	53 937	57,200
GDP/PIB head/habitant €	10 207	10 156	10 463	11 933	13 291	14,171
Construction € m	n/a	n/a	6 207	6 046	5 931	7,638

Architectural Profession Profession d'architecte

	2012	2014	2016	2018	2020	2022
Architects Architectes	2 250	2 200	2 200	2 200	2 700	2,800
% Male Homme	45	47	41	46	38	45
% Female Femme	55	53	59	54	62	54
% <40 years <40 ans	31	44	40	33	41	35
Practices Bureaux	835	778	695	698	831	903

Architectural Market Marché de l'architecture

	2012	2014	2016	2018	2020	2022
Market Marché (€ m)	50	45	55	60	60	79
Average turnover per practice (€) : Revenu moyen par bureaux d'architecture (€) :						
2 persons personnes	74 660	51 000	110 403	56 610	34 416	53,438
6 - 10 persons personnes	160 050	157 775	141 135	523 748	307 049	296,499

Response Réponse

	2012	2014	2016	2018	2020	2022
Participants Répondants	423	93	318	305	169	620
Accuracy of results 95% confidence +/- Précision des résultats: 95% confiance	-4.3	9.9	5.1	5.2	7.3	3.5

Field of Employment Domaine d'activité

	per cent pourcentage					
	2012	2014	2016	2018	2020	2022
Sole Principals Dirigeant unique	25	25	15	15	22	24
Partners & Directors Associé dirigeant	21	21	21	32	24	36
Private practice Salaried Salarie – Secteur privé	36	42	39	38	44	31
Private in-house L'industrie / commerce	0	0	2	1	0	1
Freelance Indépendant	3	1	4	3	3	1
Other Private Autres – Secteur privé	2	2	3	1	3	0
Local / central government Collectivité locale / gouvernement	4	5	7	3	3	4
Other Public Autre – secteur public	8	4	9	7	1	3

Earnings Revenus

	Average earnings €* Revenu moyen en € *					
	2012	2014	2016	2018	2020	2022
Sole Principals Dirigeant unique	12 087	15 777	10 392	9 718	18 895	15,876
Partners & Directors Associé dirigeant	11 594	12 293	9 985	13 227	19 233	15,876
Private practice Salaried Salarie – Secteur privé	14 675	11 044	12 498	11 337	13 497	16,538
Private in-house L'industrie / commerce	10 940	n/a	19 304	n/a	n/a	n/a
Freelance Indépendant	16 010	n/a	n/a	n/a	n/a	16,703
Other Private Autres – Secteur privé	14 142	n/a	15 044	n/a	n/a	3,487
Local / central government Collectivité locale / gouvernement	19 212	14 507	13 047	20 245	10 419	20,970
Other Public Autre – secteur public	13 341	n/a	17 680	6 748	n/a	21,256

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



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