

NEB-LANDS – Genova Palazzo Ducale, Italy

29/10/2021

Sector studies:

who are the **560** thousand
European architects?

Borys Czarakcziew, ACE EB Member

ace-cae.eu



CNA
PPC

CONSIGLIO NAZIONALE
DEGLI ARCHITETTI
PIANIFICATORI
PAESAGGISTI
E CONSERVATORI

Who we are?

Architecture is frequently chosen as the profession for characters in the movies and on TV.



Architecture is frequently chosen as the profession for characters in the movies and on TV for the simple reason that there is no downside to the character perception of an architect. They can be all the things you want your hero to be without the baggage that comes along with other vocations typically associated with highly intelligent people. You also can set your story however you want ... meaning if your character is a doctor, it's a medical show, lawyer ... a legal drama, a cop, well, a cop show. Architects can do and be anything the writers of these shows want them to be. Even if Hollywood doesn't really understand what we do, there is clearly a perception that architects are ethical and responsible and will endeavor to make the right decision to their own detriment.

More architects are unemployed/not working
Big jump from 2% in 2018 to 7% now. Some architects are unemployed due to Covid-19 but the underlying rate of unemployment was rising before the pandemic hit.



Numbers have stopped growing

Total number of architects grew by 14% between 2008 and 2018 but remains unchanged since 2018.



Five countries dominate

Two thirds of Europe's architects are from five countries.

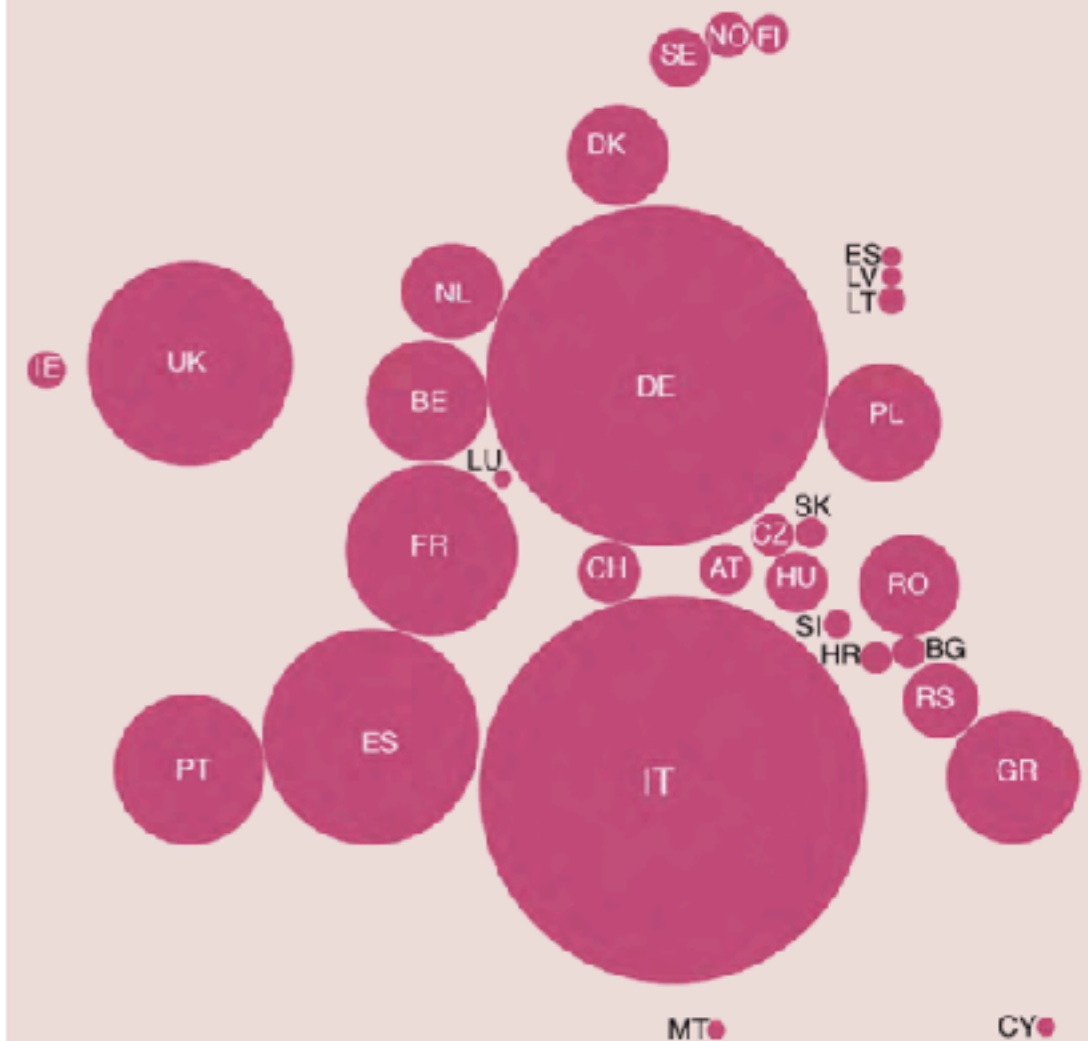
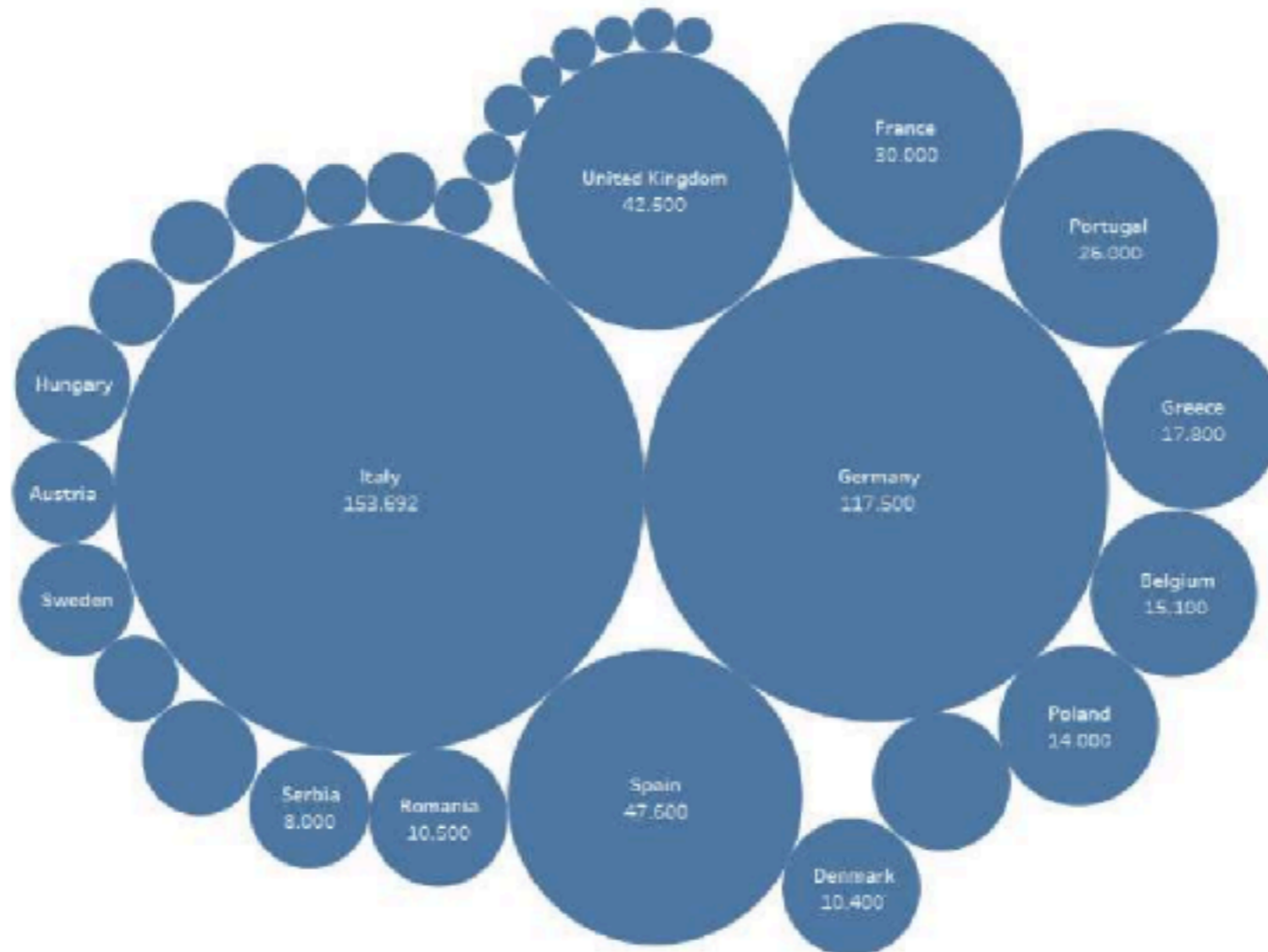


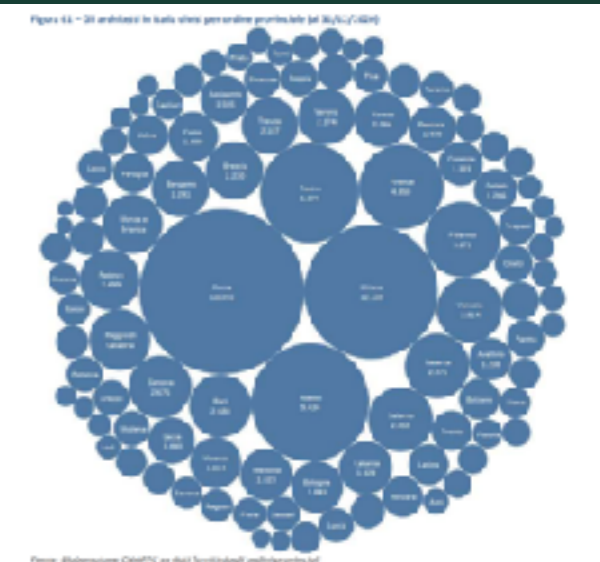
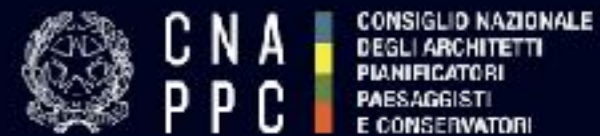


Figura 80 – Gli architetti in Europa (nel 2020)



Fonte: Elaborazione CNAPPC su dati ACE

La professione di
architetto in Italia nel
2021



Italian architects according to data provided by the orders

Figura 52 – Gli architetti italiani in base ai dati forniti dagli ordini

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
(Iscritti) Totale Ordini	93.790	99.448	105.408	111.070	117.384	122.988	128.639	133.677	138.390	142.034	145.591
Architetti per mille abitanti	1,65	1,74	1,84	1,93	2,02	2,11	2,20	2,27	2,33	2,38	2,43
Var.%	6,7%	6,0%	6,0%	5,4%	5,7%	4,8%	4,6%	3,9%	3,5%	2,6%	2,5%

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
(Iscritti) Totale Ordini	148.445	150.550	151.999	153.625	153.659	152.944	152.689	153.735	153.123	153.692
Architetti per mille abitanti	2,47	2,50	2,52	2,55	2,55	2,55	2,55	2,57	2,57	2,58
Var.%	2,0%	1,4%	1,0%	1,1%	0,0%	-0,5%	-0,2%	0,7%	-0,4%	0,4%

Fonte: Elaborazione CNAPPC su dati forniti dagli ordini provinciali



Figura 79 – Gli architetti in Europa (indagine ACE 2020)

	2010	2012	2014	2016	2018	2020	Quota sul totale
Austria	4.500	4.600	4.650	5.200	5.400	5.800	1,0%
Belgium	13.000	13.200	15.000	15.100	14.800	15.100	2,7%
Bulgaria	2.900	2.900	3.400	2.800	2.000	2.100	0,4%
Croatia	2.200	2.250	2.200	2.200	2.200	2.700	0,5%
Cyprus	850	900	950	950	950	950	0,2%
Czech Republic	8.000	8.000	8.200	8.300	8.800	4.800	0,7%
Denmark	8.500	9.800	10.000	10.800	10.300	10.400	1,9%
Estonia	600	600	800	800	800	800	0,1%
Finland	3.050	3.250	3.300	3.500	3.600	3.800	0,7%
France	25.700	29.900	29.800	30.600	30.000	30.800	5,4%
Germany	100.500	101.600	107.200	109.200	111.200	117.500	21,0%
Greece	15.800	16.400	17.600	18.200	18.500	17.800	3,2%
Hungary	4.000	4.000	4.100	4.200	4.200	7.300	1,3%
Ireland	2.600	2.600	2.600	2.500	2.500	3.500	0,6%
Italy	145.591	150.550	153.625	152.944	153.735	153.692	27,4%
Latvia	900	900	900	900	820	810	0,1%
Lithuania	1.500	1.500	1.350	1.350	1.400	1.450	0,3%
Luxembourg	800	680	900	950	960	1.100	0,2%
Malta	650	650	650	650	1.006	1.800	0,3%
Norway	3.400	3.600	3.650	3.740	3.825	4.800	0,7%
Poland	13.500	13.700	13.800	14.800	14.000	14.800	2,5%
Portugal	17.100	17.100	21.200	22.700	23.000	26.800	4,6%
Romania	7.200	7.400	7.400	7.600	9.900	10.500	1,9%
Serbia	8.000	8.000	8.000	8.000	8.000	8.000	1,4%
Slovak Republic	1.600	1.600	1.750	1.650	1.770	1.800	0,3%
Slovenia	1.400	1.400	1.450	1.350	1.380	1.460	0,3%
Spain	50.000	51.000	51.700	53.800	55.700	47.600	8,5%
Sweden	5.600	5.800	6.150	6.550	6.750	7.800	1,2%
Switzerland	7.000	5.400	7.200	7.300	7.400	7.500	1,3%
The Netherlands	9.900	10.700	10.900	11.200	10.600	10.400	1,9%
United Kingdom	32.900	33.500	34.300	36.700	41.000	42.500	7,6%
Totale Europa	503.241	513.480	534.725	543.834	551.446	560.562	100,0%

Fonte: Elaborazioni CNAPPC su dati ACE 2020

ESTIMATED NUMBER OF ARCHITECTS IN EACH COUNTRY AND NUMBER OF ARCHITECTS PER 1000 POPULATION

	number of architects	population	architects per 1000 population
Austria	5800	8901064	0.7
Belgium	15100	11549888	1.3
Bulgaria	2100	6951482	0.3
Croatia	2700	4058165	0.7
Cyprus	950	888005	1.1
Czechia	4000	10693939	0.4
Denmark	10400	5822763	1.8
Estonia	800	1328976	0.6
Finland	3800	5525292	0.7
France	30000	67098624	0.4
Germany	117500	83166711	1.4
Greece	17800	10709730	1.7
Hungary	7300	9789526	0.7
Ireland	3500	4963639	0.7
Italy	152200	60244639	2.5
Latvia	810	1907676	0.4
Lithuania	1460	2794090	0.5
Luxembourg	1100	626108	1.8
Malta	1000	514564	1.9
Netherlands	10400	17407585	0.6
Norway	4000	5367580	0.7
Poland	14000	37958138	0.4
Portugal	26000	10295909	2.5
Romania	10500	19317984	0.5
Serbia	8000	6926705	1.2
Slovakia	1800	5457873	0.3
Slovenia	1460	2095861	0.7
Spain	47600	47329981	1.0
Sweden	7000	10327589	0.7
Switzerland	7500	6806033	0.9
United Kingdom	42500	67025542	0.6
EUROPE - 31 - 2020	559070	535632069	1.0

POPULATION PYRAMID - ANALYSIS OF ARCHITECTS BY AGE AND GENDER

CHART 1-10
AGE PROFILE OF ARCHITECTS

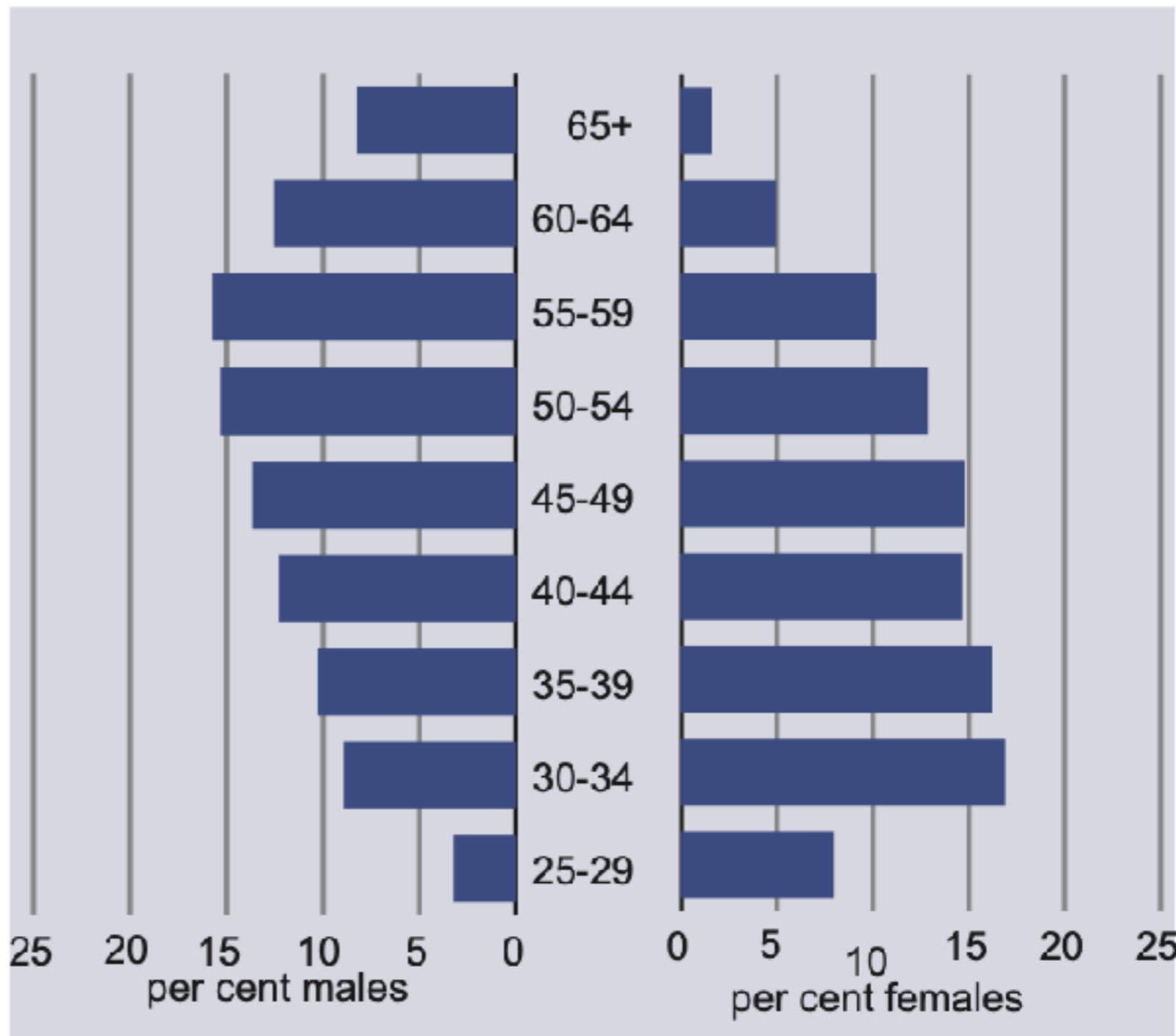
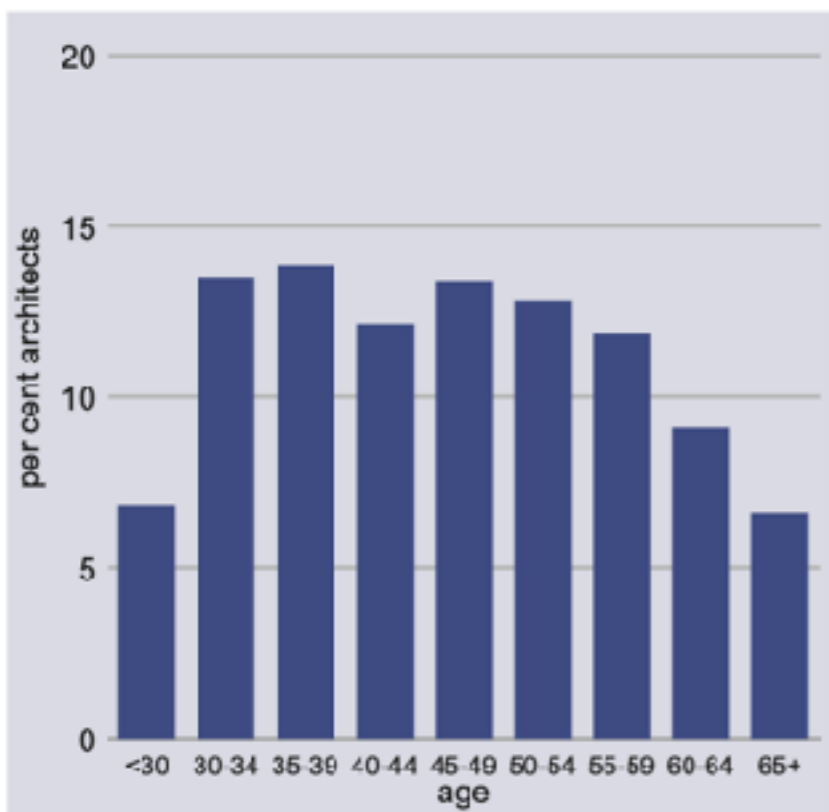
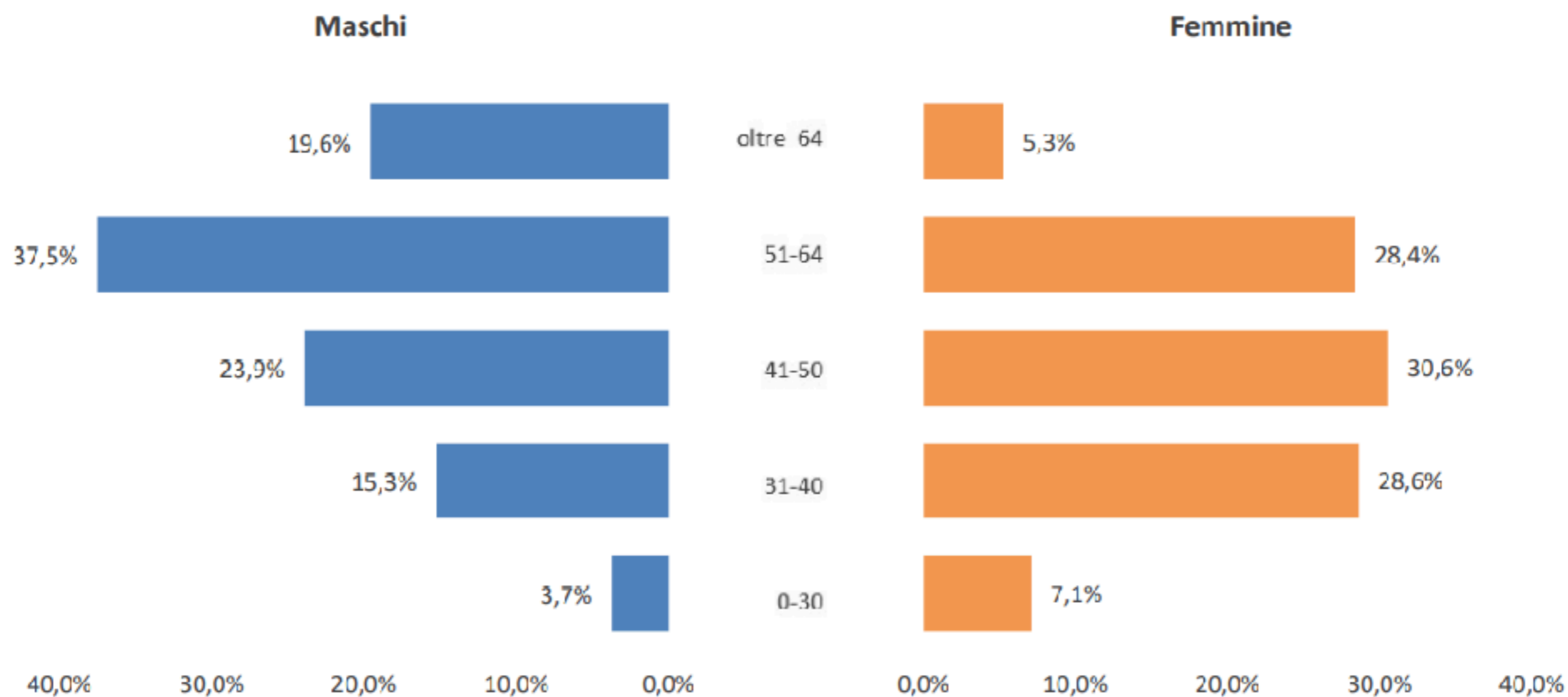


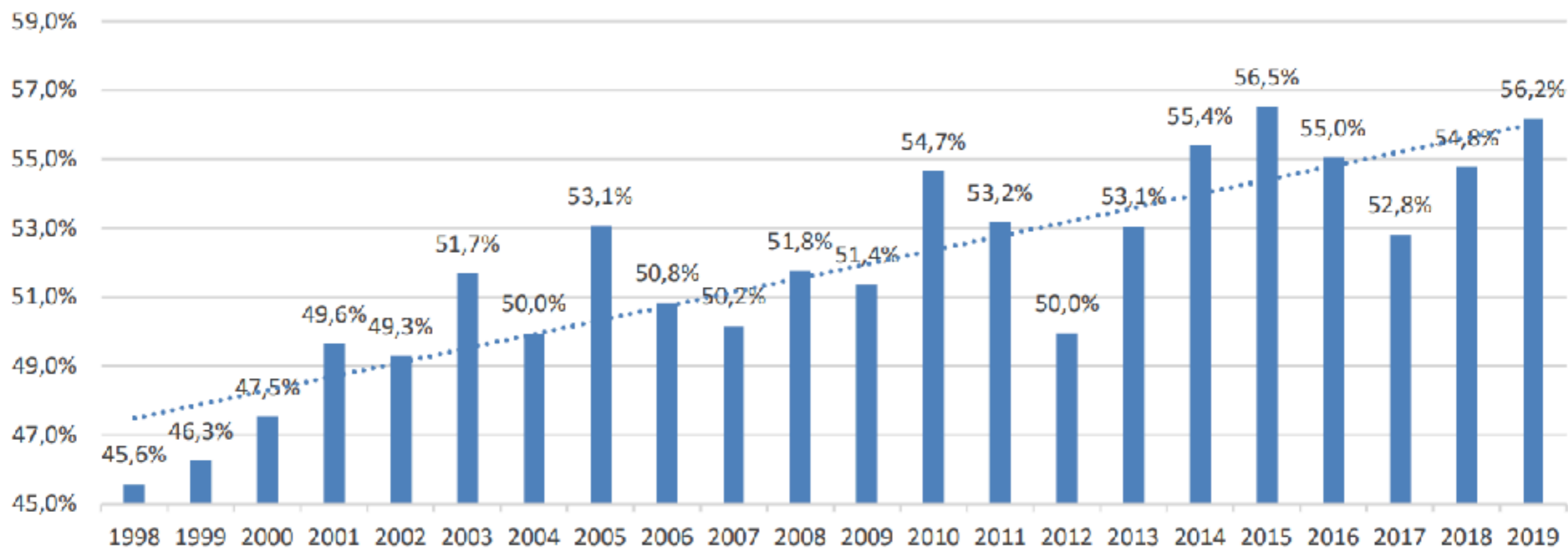
Figura 69 – Distribuzione per età degli architetti per genere nel 2021



Fonte: CNAPPC Albo Unico Nazionale (* dato parziale riferito al mese di novembre 2021)

Proportion of women among those qualified as architects, planners, landscape architects and conservators in Italy

Figura 42 – Quota di donne tra gli abilitati alla professione di architetto, pianificatore, paesaggista e conservatore



Fonte: Elaborazioni CNAPPC su dati MIUR



560 000
Total number of architects



42%
Female architects



34%
Aged under 40



75%
Employed full-time



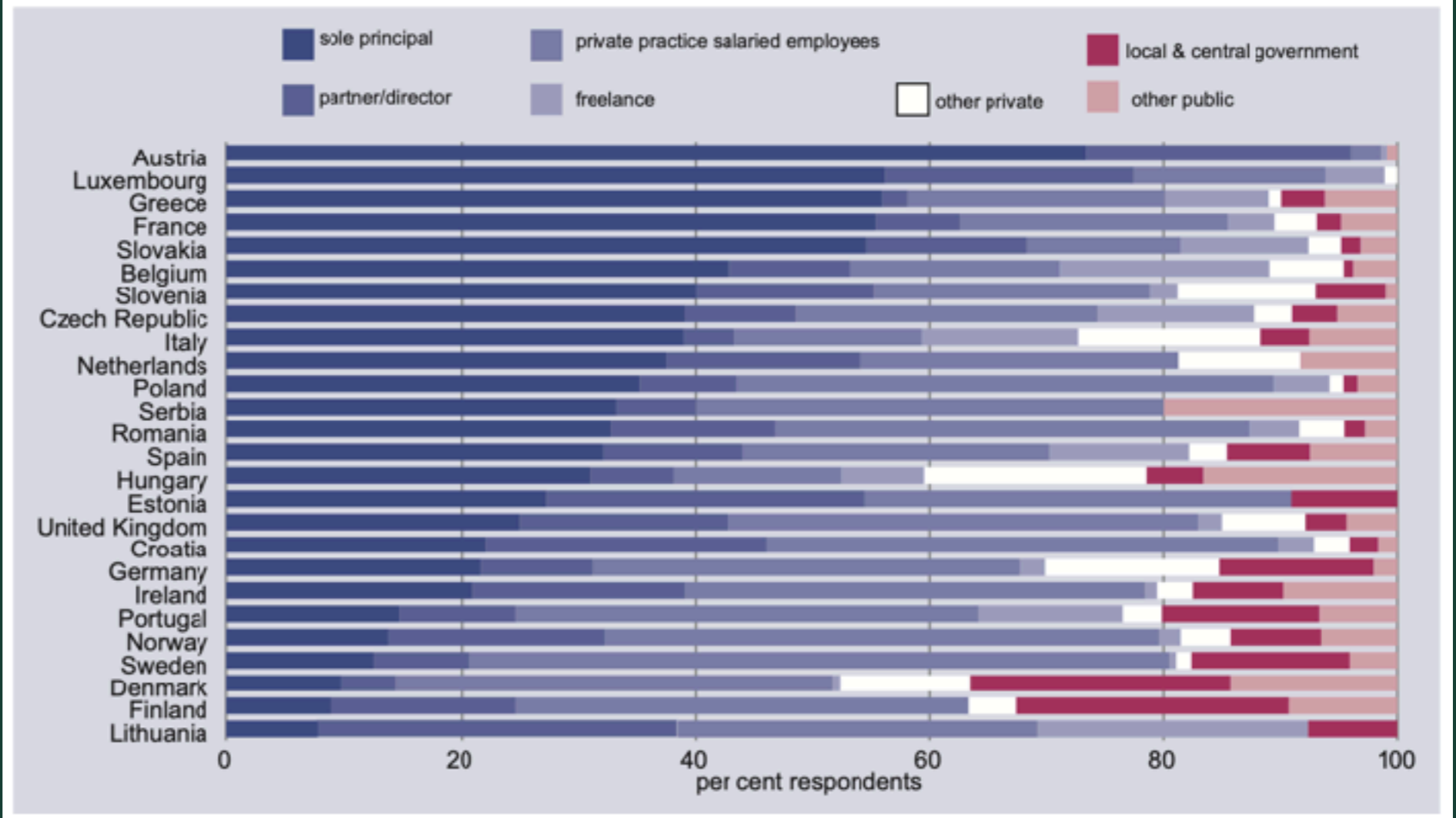
29%
Employees in private practice



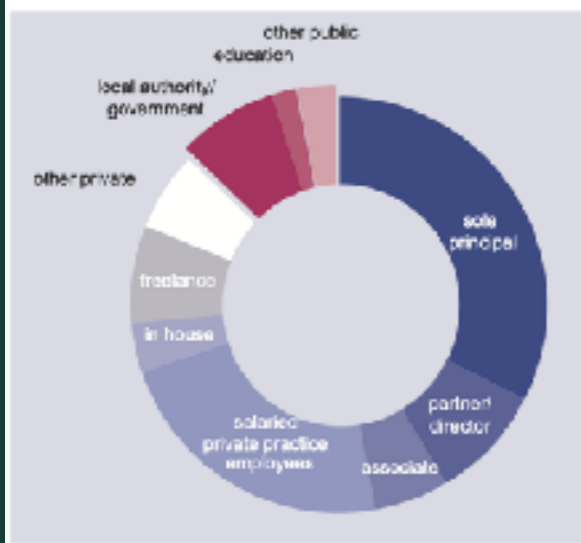
42%
Partners, Directors, Sole Principals

How do we work?

MAIN EMPLOYMENT FIELD BY COUNTRY



FIELD OF EMPLOYMENT



Is the function of Architects protected in your country?

- General Information
- Education
- PPE (Professional Practice Experience)
- Professional Practice
- Access to the market
- Tariffs and rates
- Market Access for foreign architects

Name of the country (please complete in bloc capitals)	Is the function of Architects protected in your country?
Danmark	No
FINLAND	No
Ireland	No
NORWAY	No
Sweden	No
SWITZERLAND	No
NETHERLANDS	No
United Kingdom	No
BELGIUM	Yes
CYPRUS	Yes
CZECH REPUBLIC	Yes
ESTONIA	Yes
France	Yes
GERMANY	Yes
HUNGARY	Yes
ITALY	Yes
LATVIA	Yes
LUXEMBOURG	Yes
MALTA	Yes
POLAND	Yes
PORTUGAL	Yes
Romania	Yes
Slovakia	Yes
SPAIN	Yes
Austria	
BULGARIA	
CROATIA	
GREECE	
LITHUANIA	

ESTIMATED NUMBER AND SIZE OF ARCHITECTURAL PRACTICES

number (estimate)	size of architectural practice (number of architectural staff)							TOTAL
	1 staff	2 staff	3 to 5 staff	6 to 10 staff	11 to 30 staff	31 to 50 staff	over 50 staff	
Austria	1 343	355	285	103	27	2	1	2 115
Belgium*	3 302	337	348	136	42	20	3	4 238
Croatia	441	156	169	49	15	0	1	831
Czechia	264	198	323	38	29	0	0	850
Denmark	997	165	330	97	69	6	3	1 667
Estonia*	74	10	11	4	6	1	1	105
Finland	309	103	165	48	23	0	1	649
France	2 437	771	801	376	256	35	30	4 708
Germany	21 302	3 808	2 558	649	147	20	8	28 492
Greece	4 817	630	463	103	32	2	1	6 097
Hungary*	659	163	111	24	14	2	1	973
Ireland	312	137	123	54	22	5	1	653
Italy	16 286	3 776	3 836	1 110	863	170	92	26 134
Lithuania*	346	39	30	6	2	0	0	423
Luxembourg	169	48	59	24	7	1	0	305
Netherlands*	1 859	223	434	143	95	8	10	2 772
Norway	207	166	116	93	25	12	2	620
Poland*	2 690	738	394	125	75	13	6	4 070
Portugal	1 449	197	446	188	270	12	29	2 562
Romania	1 330	391	593	110	65	0	5	2 514
Serbia*	969	304	396	105	46	9	6	1 835
Slovakia	168	123	85	25	6	1	1	409
Slovenia	257	71	88	28	3	0	0	447
Spain	4 366	2 207	1 429	502	39	3	1	6 567
Sweden	607	121	100	48	31	6	8	923
United Kingdom	5 158	1 177	1 165	341	232	92	59	8 224
2020 EUR-26	72 138	16 517	14 857	4 530	2 460	419	270	111 187
per cent of practices	65	15	13	4	2	<1	<1	100
<i>2018 EUR-26</i>	<i>94 129</i>	<i>18 158</i>	<i>14 910</i>	<i>4 069</i>	<i>1 724</i>	<i>228</i>	<i>139</i>	<i>133 354</i>
<i>2016 EUR-27</i>	<i>114 247</i>	<i>21 319</i>	<i>16 706</i>	<i>4 243</i>	<i>1 516</i>	<i>202</i>	<i>108</i>	<i>158 342</i>
<i>2014 EUR-26</i>	<i>120 242</i>	<i>22 423</i>	<i>16 066</i>	<i>3 151</i>	<i>1 069</i>	<i>100</i>	<i>30</i>	<i>163 078</i>
<i>2012 EUR-25</i>	<i>98 193</i>	<i>28 134</i>	<i>22 663</i>	<i>5 247</i>	<i>1 305</i>	<i>151</i>	<i>35</i>	<i>155 725</i>
<i>2010 EUR-23</i>	<i>86 049</i>	<i>19 477</i>	<i>18 963</i>	<i>5 814</i>	<i>1 973</i>	<i>279</i>	<i>83</i>	<i>132 643</i>

'architectural staff' includes principals partners & directors; associates; salaried architects; technical staff; permanent and freelance.
* caution - small sample Row or column totals may not add precisely due to rounding.

PRACTICES ANALYSED BY SIZE

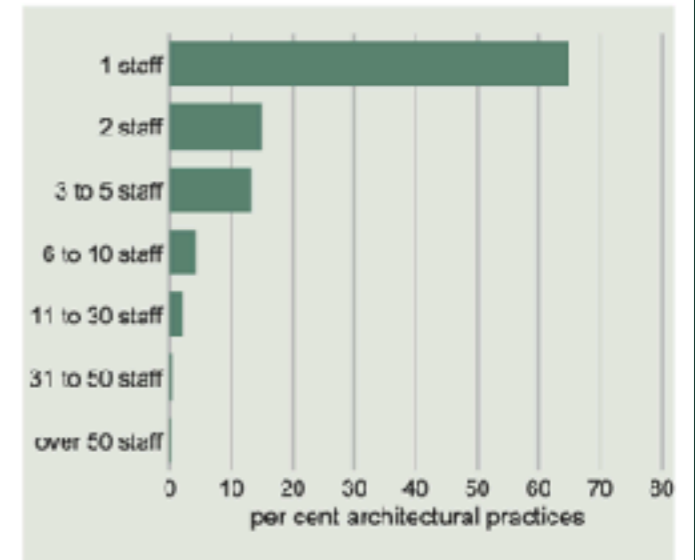
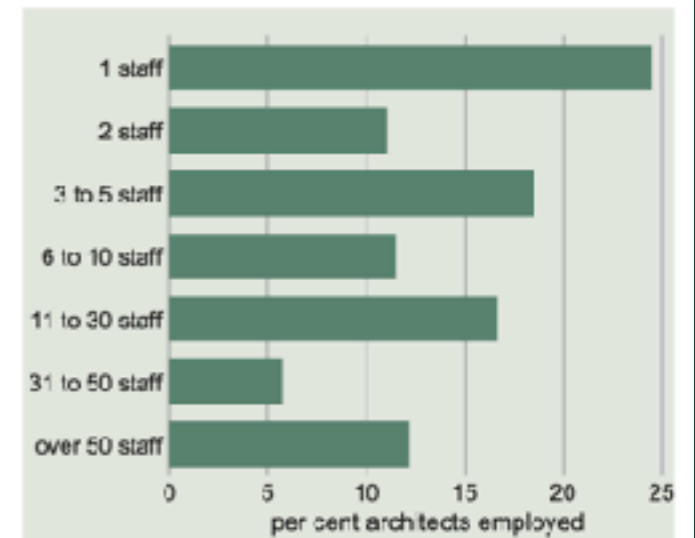


CHART 3-4
PROPORTION OF ARCHITECTS EMPLOYED IN PRACTICES OF DIFFERENT SIZES



ESTIMATED NUMBER AND SIZE OF ARCHITECTURAL PRACTICES

number (estimate)	size of architectural practice (number of architectural staff)							TOTAL
	1 staff	2 staff	3 to 5 staff	6 to 10 staff	11 to 30 staff	31 to 50 staff	over 50 staff	
Austria	1 098	333	279	93	26	1	0	1 831
Belgium	3 263	465	436	159	43	21	2	4 389
Croatia	360	143	140	40	14	0	1	698
Cyprus *	67	50	90	9	8	0	0	225
Czech Republic	885	154	334	97	47	4	1	1 524
Denmark	919	123	106	44	58	12	9	1 271
Estonia *	75	25	41	14	6	0	0	161
Finland	151	53	57	35	31	6	4	336
France	5 537	1 456	777	194	59	7	2	8 033
Germany	26 970	3 560	2 167	561	173	8	1	33 440
Greece	3 568	988	513	118	89	10	4	5 325
Hungary *	418	168	168	71	30	5	1	869
Ireland	91	91	91	26	33	4	2	636
Italy	2 136	4 237	3 270	781	291	31	23	41 242
Lithuania	168	59	43	26	8	2	0	359
Luxembourg *	168	23	43	16	9	1	0	268
Malta *	48	39	27	27	6	3	0	150
Netherlands	2 136	673	411	115	70	11	12	3 428
Norway	344	45	121	52	62	3	4	630
Poland *	2 085	661	1 075	179	138	0	7	4 146
Portugal	1 706	570	763	198	91	16	11	3 356
Romania	888	737	584	147	44	4	2	2 407
Slovenia *	220	60	81	22	3	0	1	386
Spain	5 312	2 371	2 006	586	57	4	2	10 337
Sweden	705	141	112	59	41	8	11	1 076
United Kingdom	4 407	981	1 268	445	305	70	39	7 515
2018 EUR-26	94 526	18 227	15 060	4 112	1 746	230	139	134 038
per cent of practices	71	14	11	3	1	<1	<1	100

96%

DIFFICULTIES EXPERIENCED BY PRACTICES IN THE OJEU BIDDING PROCESS

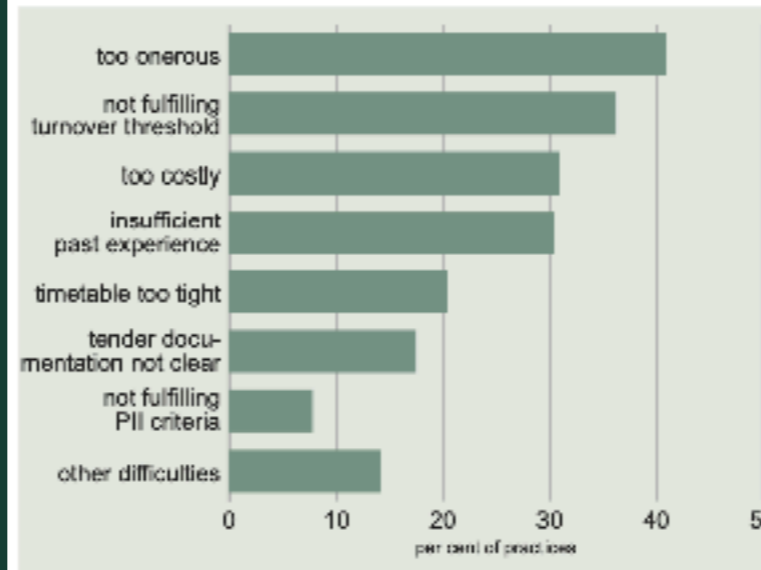
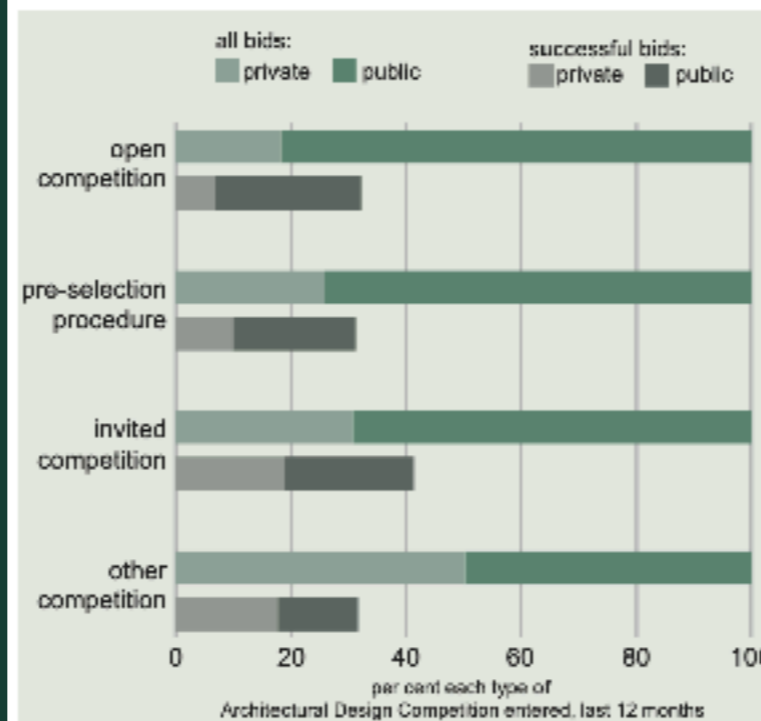


CHART 3-11 ARCHITECTURAL DESIGN COMPETITIONS ENTERED LAST 12 MONTHS - SUCCESS RATES



ENTERING ARCHITECTURAL DESIGN COMPETITIONS AND BIDDING FOR PROJECTS ADVERTISED IN OJEU

per cent / number	% practices participating in Architectural Design Competition	average number of bids for OJEU projects
Austria	27	1.1
Belgium*	18	1.4
Croatia	3	0.2
Czechia	9	0.2
Denmark	6	0.1
Estonia*	20	0.2
Finland	22	0.6
France	18	2.1
Germany	13	0.8
Greece	4	0.8
Hungary*	22	0.9
Ireland	29	3.8
Italy	12	0.8
Lithuania*	33	1.0
Luxembourg	22	1.5
Netherlands*	7	2.2
Norway	18	0.9
Poland*	33	9.1
Portugal	4	0.1
Romania	3	0.1
Serbia*	0	0.0
Slovakia	11	0.7
Slovenia	14	0.3
Spain	17	0.4
Sweden	20	3.2
United Kingdom	13	0.8
2020 EUROPE-26	13	0.9
2018 EUROPE-26	12	2.3
2016 EUROPE-27	20	n/a
2014 EUROPE-26	n/a	n/a
2012 EUROPE-25	n/a	n/a
2010 EUROPE-23	n/a	n/a

* caution - small sample

Can only an architect registered on the list take part in public procurement for architectural designs?

- General Information
- Education
- PPE (Professional Practice Experience)
- Professional Practice
- Access to the market
- Tariffs and rates
- Market Access for foreign architects

Name of the country (please complete in bloc capitals)	Can only an architect registered on the list take part in public procurement for architectural designs?
POLAND	No
Romania	No
Danmark	No
FINLAND	No
Ireland	No
LUXEMBOURG	No
United Kingdom	No
Sweden	No
NETHERLANDS	No
SWITZERLAND	No
NORWAY	No
SPAIN	Yes
CYPRUS	Yes
HUNGARY	Yes
LATVIA	Yes
BELGIUM	Yes
GERMANY	Yes
MALTA	Yes
PORTUGAL	Yes
Slovakia	Yes
CZECH REPUBLIC	Yes
ITALY	Yes
ESTONIA	Yes
France	Yes
Austria	
BULGARIA	
CROATIA	
GREECE	

Is the lowest price criterion (excluding quality criteria) used in the case of public procurement of architectural projects?

- General Information
- Education
- PPE (Professional Practice Experience)
- Professional Practice
- Access to the market
- Tariffs and rates
- Market Access for foreign architects

Name of the country (please complete in bloc capitals)	Is the lowest price criterion (excluding quality criteria) used in the case of public procurement of architectural projects?
FINLAND	Maybe it is, but it is very rare
Ireland	Maybe it is, but it is very rare
Sweden	Maybe it is, but it is very rare
NETHERLANDS	Maybe it is, but it is very rare
SPAIN	Maybe it is, but it is very rare
BELGIUM	Maybe it is, but it is very rare
GERMANY	Maybe it is, but it is very rare
CZECH REPUBLIC	Maybe it is, but it is very rare
Danmark	No
LUXEMBOURG	No
HUNGARY	No
POLAND	Yes
Romania	Yes
United Kingdom	Yes
NORWAY	Yes
CYPRUS	Yes
LATVIA	Yes
MALTA	Yes
PORTUGAL	Yes
Slovakia	Yes
ITALY	Yes
ESTONIA	Yes
France	Yes
SWITZERLAND	
Austria	
BULGARIA	
CROATIA	

Do you agree that the quality criterion is currently the main condition for selecting a bidder in the public procurement?

- General Information
- Education
- PPE (Professional Practice Experience)
- Professional Practice
- Access to the market
- Tariffs and rates
- Market Access for foreign architects

Name of the country (please complete in bloc capitals)	Do you agree that the quality criterion is currently the main condition for selecting a bidder in the public procurement?
BELGIUM	Strongly agree
France	Agree
LATVIA	Agree
SPAIN	Neutral
GERMANY	Neutral
Danmark	Neutral
LUXEMBOURG	Neutral
CYPRUS	Neutral
Slovakia	Neutral
Sweden	Neutral
Ireland	Disagree
NETHERLANDS	Disagree
NORWAY	Disagree
United Kingdom	Disagree
FINLAND	Disagree
CZECH REPUBLIC	Disagree
HUNGARY	Disagree
POLAND	Disagree
MALTA	Disagree
ITALY	Disagree
PORTUGAL	Strongly disagree
Romania	Strongly disagree
ESTONIA	Strongly disagree
SWITZERLAND	

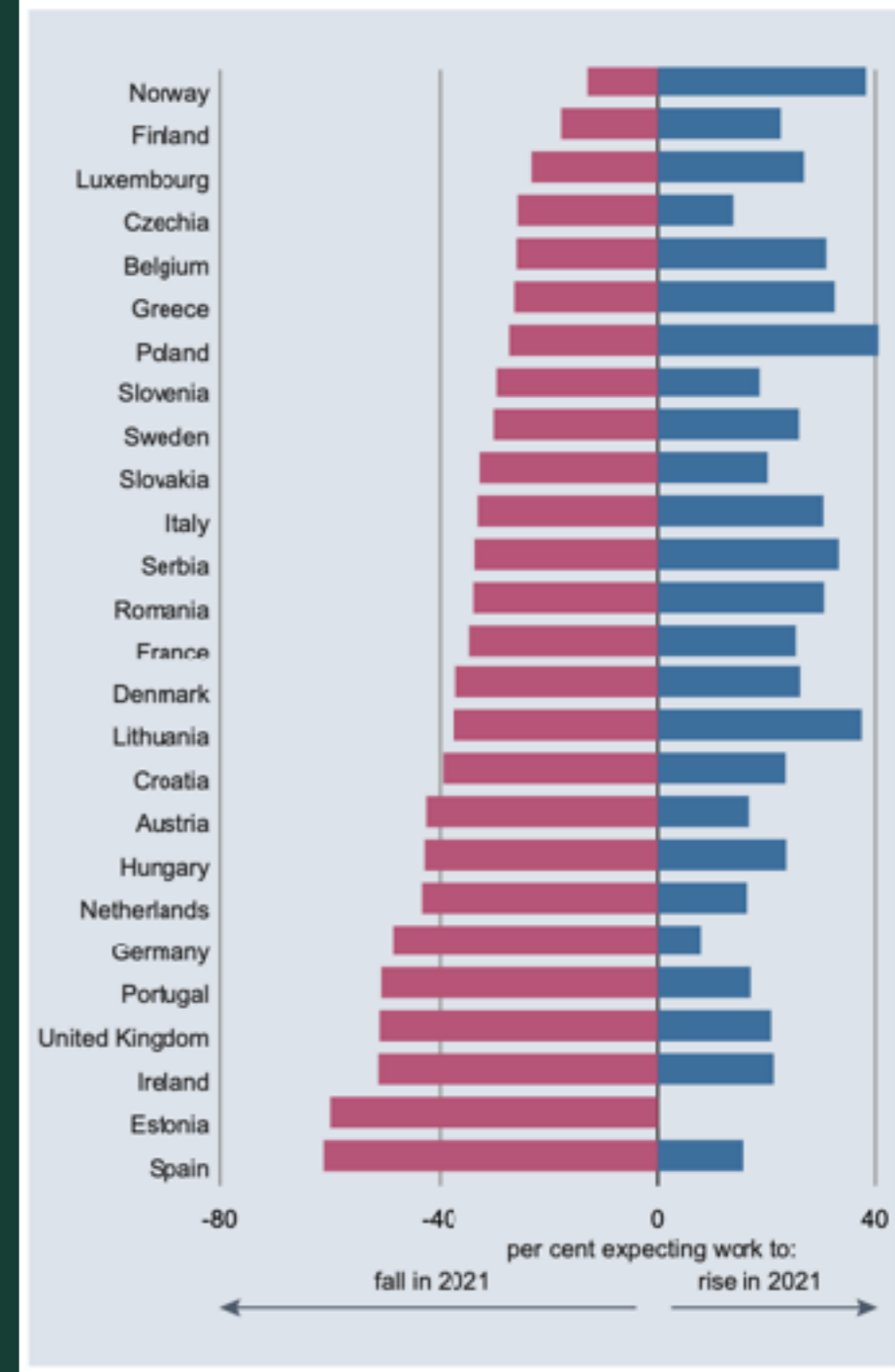
PROPORTION OF WORK UNDERTAKEN BY BUILDING TYPE ANALYSED BY COUNTRY

per cent	new build	heritage	other refurbishment
Austria	69	7	34
Belgium*	44	4	52
Croatia	67	11	23
Czechia	59	11	30
Denmark	49	18	35
Estonia*	87	3	10
Finland	53	14	33
France	41	12	47
Germany	48	13	39
Greece	66	9	35
Hungary*	65	10	25
Ireland	46	15	38
Italy	18	19	63
Lithuania*	60	11	29
Luxembourg	55	10	35
Netherlands*	54	18	30
Norway	68	7	26
Poland*	62	5	33
Portugal	49	14	37
Romania	71	7	22
Serbia*	35	20	45
Slovakia	64	14	22
Slovenia	67	13	19
Spain	47	13	40
Sweden	61	8	31
United Kingdom	36	19	45
2020 EUROPE-26	44	14	43
2015 EUROPE-26	41	59	
2015 EUROPE-27	41	59	
2014 EUROPE-26	37	63	

PROPORTION OF WORK UNDERTAKEN BY EACH SERVICE TYPE

per cent	building design											TOTAL
	concept design	detailed design	landscape design	interior design	feasibility studies	project management	urban planning	certification	property valuation	BIM co-ordination	other service	
Austria	29	44	2	3	5	6	2	2	0	0	7	100
Belgium*	29	44	1	6	5	5	2	0	1	2	3	100
Croatia	28	42	4	11	2	2	4	1	0	0	7	100
Czechia	27	39	4	9	0	6	0	0	0	1	4	100
Denmark	23	30	9	5	1	16	0	1	0	0	14	100
Estonia*	48	38	1	8	0	7	0	2	0	0	0	100
Finland	29	41	3	7	2	4	6	1	0	1	6	100
France	40	29	1	6	6	5	3	0	0	0	5	100
Germany	34	16	1	4	2	2	1	3	1	0	35	100
Greece	27	35	1	12	1	7	0	2	0	1	13	100
Hungary*	27	46	0	3	0	3	7	0	5	0	8	100
Ireland	30	39	2	6	5	4	1	2	0	0	10	100
Italy	19	32	3	12	5	8	2	3	4	0	12	100
Lithuania*	13	63	6	9	2	10	1	0	0	3	3	100
Luxembourg	43	28	3	3	6	7	4	1	1	1	4	100
Netherlands*	31	38	1	6	7	11	2	1	0	2	1	100
Norway	35	31	3	6	4	2	0	1	0	2	3	100
Poland*	35	47	2	7	3	1	1	0	1	1	2	100
Portugal	52	24	1	8	3	3	3	1	1	1	4	100
Romania	29	40	1	6	5	4	5	1	0	0	6	100
Serbia*	9	10	2	43	0	10	26	0	0	0	0	100
Slovakia	23	44	4	9	2	9	6	0	0	1	2	100
Slovenia	23	39	1	8	4	12	5	1	1	0	6	100
Spain	19	49	0	5	2	3	4	5	3	0	9	100
Sweden	20	40	1	5	5	4	8	1	0	1	9	100
United Kingdom	29	42	1	3	7	8	1	2	0	0	7	100
2020 EUR-26	31	25	1	6	3	5	2	2	2	0	22	100
2016 EUR-26	67		2	10	3	4	3	2	2	n/a	7	100
2016 EUR-27	62		2	11	3	4	3	3	2	n/a	9	100
2014 EUR-26	57		3	11	4	5	4	4	2	n/a	11	100

FUTURE WORKLOAD PROSPECTS FOR 2021



Is it profitable?



€1914 billion
Value of construction market



€17 billion
Value of architectural market



Future sentiment is weak



54%
Private housing work



56%
Building design work



3%
Work from outside own country

CHART 2-8
VALUE OF ARCHITECTURAL MARKET AVERAGE PER ARCHITECT

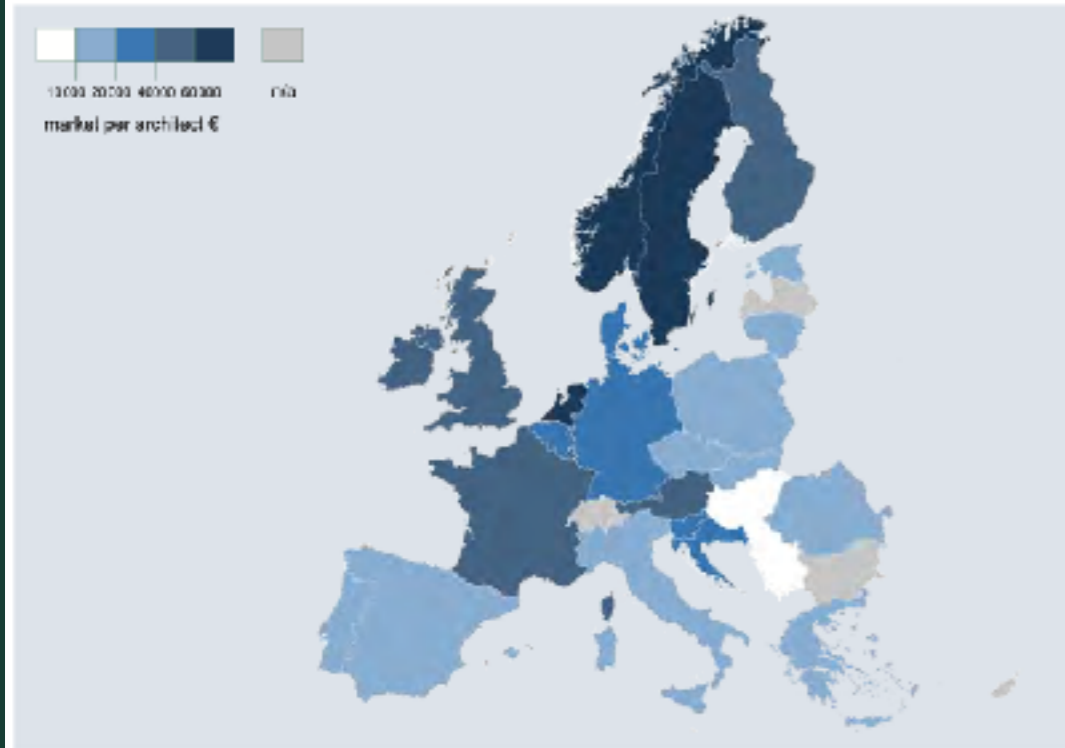
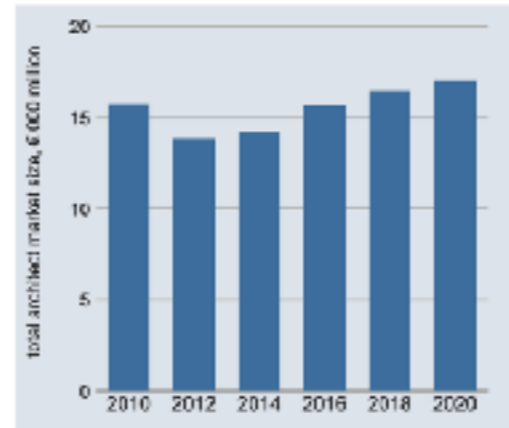
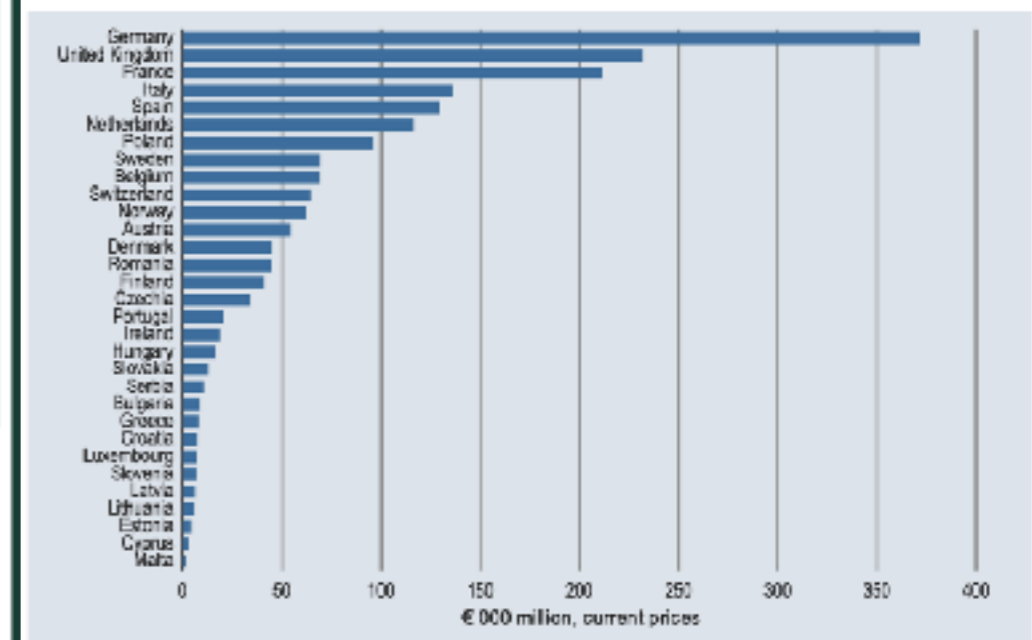


CHART 2-9
CHANGES 2010 TO 2020 IN ESTIMATED VALUE OF ARCHITECTURAL MARKET IN EUROPE-31



Base: all 31 European countries
 Source: Mirza & Nacey estimates based on survey data

ESTIMATED SIZE OF EUROPE CONSTRUCTION MARKET 2020



Base: all 31 European countries
 Source: Mirza & Nacey estimates based on data sourced from Eurostat updated using the most recent Eurostat Construction Output/Production Indices.

Is architect is a profitable profession?

Found on the internet

Now, often there is confusion on profitable and lucrative, especially amongst younger staff. If you're talking about compensation, what's important to understand is HOW to make money in this profession. The short answer is that you have to rise up to the level of Management. Being the classic TV architect, doing the drawings is only being in the middle of a huge pack. To get to the real money, one has to manage those people. There is money to be made, but you've got to rise up into the top 10% of the firm to get to it.

To do that you've got to be working for a large firm. Most of the architectural firms have between 1 and 9 people. That's not going to get you anything but a job, and most small businesses struggle. You're going to have to get into a large firm and rise to the top.



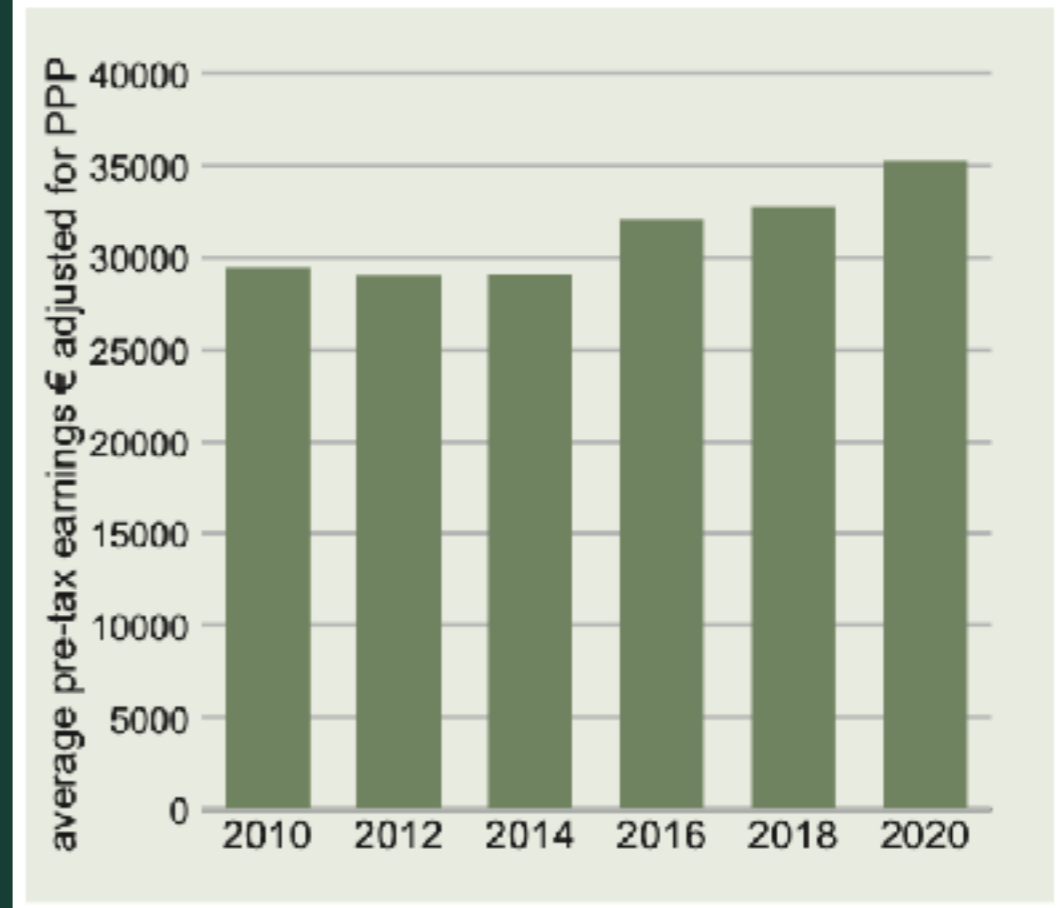
5 Factors Affecting Architects' Salary:

- 1. Firm Size and Specialization**
- 2. Region** (As a general rule the region plays a significant factor in the salary range)
- 3. Skills and Qualifications** (software, license)
- 4. Market Conditions**
- 5. Architect's Role** (from drafting position to design director)

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	56	19	22	2	2
Belgium*	41	27	27	2	4
Croatia	17	33	7	15	29
Czechia	32	46	16	1	6
Denmark	22	28	43	1	7
Estonia*	0	76	22	1	1
Finland	10	36	41	3	11
France	62	26	8	1	5
Germany	5	9	21	2	63
Greece	31	51	3	2	12
Hungary*	51	30	9	1	9
Ireland	33	47	12	2	6
Italy	36	38	8	8	12
Lithuania*	26	24	24	0	26
Luxembourg	52	22	13	1	12
Netherlands*	6	52	32	2	8
Norway	5	32	58	0	5
Poland*	30	25	23	3	19
Portugal	35	39	7	4	15
Romania	20	37	14	3	26
Serbia*	7	17	33	0	43
Slovakia	37	31	18	5	12
Slovenia	32	41	11	3	14
Spain	45	29	5	6	14
Sweden	1	29	65	1	4
United Kingdom	27	44	21	2	7
2020 EUROPE-26	28	30	15	4	23

CHANGE IN ALL ARCHITECTS' AVERAGE PRE-TAX EARNINGS (ALL SURVEY COUNTRIES) 2010 TO 2020



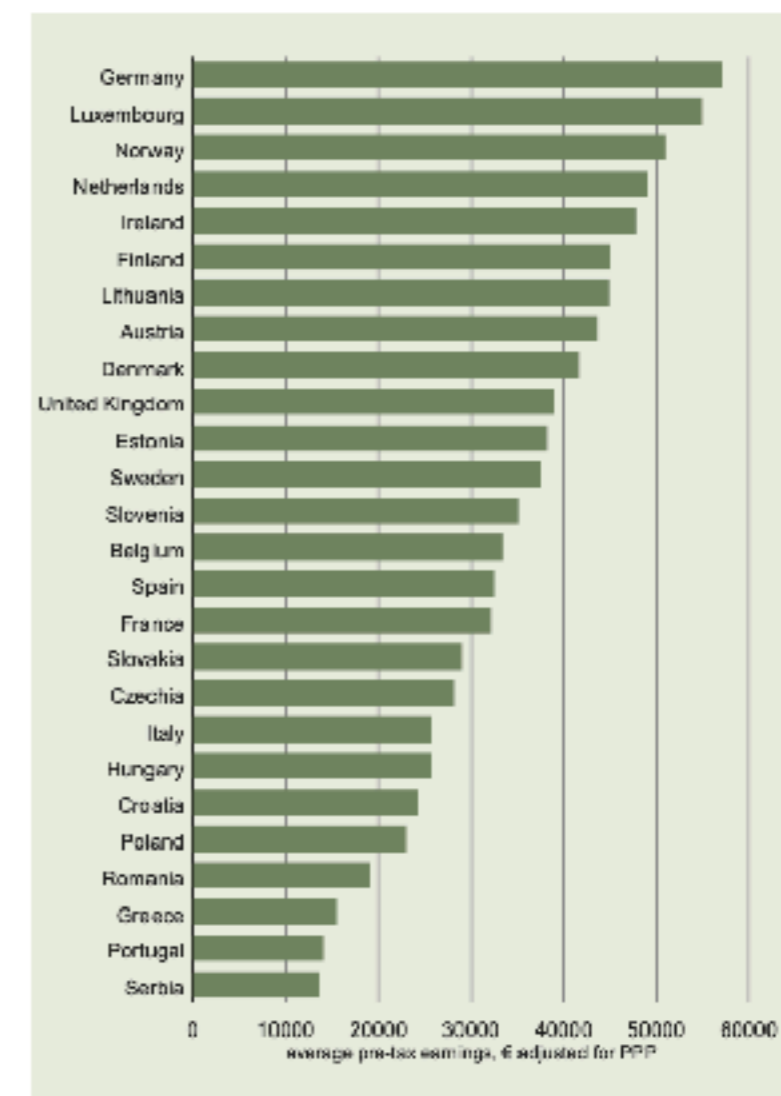
AVERAGE PRE-TAX EARNINGS OF ALL FULL-TIME ARCHITECTS ANALYSED BY COUNTRY

€	average (median) pre-tax earnings 2020		average (median) pre-tax earnings adjusted for PPP				
	adjusted for PPP	unadjusted for PPP	2018	2016	2014	2012	2010
Austria	43629	47500	46168	47529	42095	42174	38925
Belgium*	33424	38500	32520	35481	30192	28354	28384
Croatia	24173	16196	17844	19338	17946	18078	18892
Czechia	28221	19473	27375	17518	13150	19410	21268
Denmark	41736	60398	42684	39478	43187	42543	37843
Estonia*	38217	30000	21401	19947	22215	12776	15318
Finland	45008	55000	41735	41771	40486	38339	35601
France	32169	35000	28998	27986	27498	27326	28871
Germany	57143	60000	54286	n/a	43350	46422	39932
Greece	15421	13000	15421	n/a	16145	18927	20534
Hungary*	25707	17692	20566	19609	n/a	13678	n/a
Ireland	47847	58500	39872	40816	38103	36847	40200
Italy	25717	27000	24728	24777	27132	24248	18779
Lithuania*	44892	29000	20124	n/a	n/a	n/a	10252
Luxembourg	55004	69800	56738	58725	48701	46267	n/a
Netherlands*	48976	56000	44524	39047	54496	n/a	n/a
Norway	50939	72432	46965	n/a	n/a	n/a	n/a
Poland*	22932	12888	15010	17489	n/a	22045	24935
Portugal	14101	12000	14101	14833	13433	13714	n/a
Romania	19048	10000	10273	15274	9822	10844	8172
Serbia*	13619	7000	n/a	n/a	n/a	n/a	n/a
Slovakia	28944	20000	n/a	18018	15581	n/a	16378
Slovenia	35170	30000	28136	24406	19808	17964	29240
Spain	32503	30000	26002	24390	28354	20534	n/a
Sweden	37559	47137	33052	41216	35890	35649	36612
United Kingdom	38916	45376	40862	38871	37582	48242	45922
2020 EUROPE-26** (2018-26 2016-27 2014-26 2012-25 2010-23 2008-17)	35220	36740	32731	32068	29070	29014	29493

* caution - small sample

** The 2020 EUROPE-26 figure is weighted to reflect the total architectural population in all participating countries
Earnings data converted from local currencies to Euros exchange rate as at 01.05.20

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



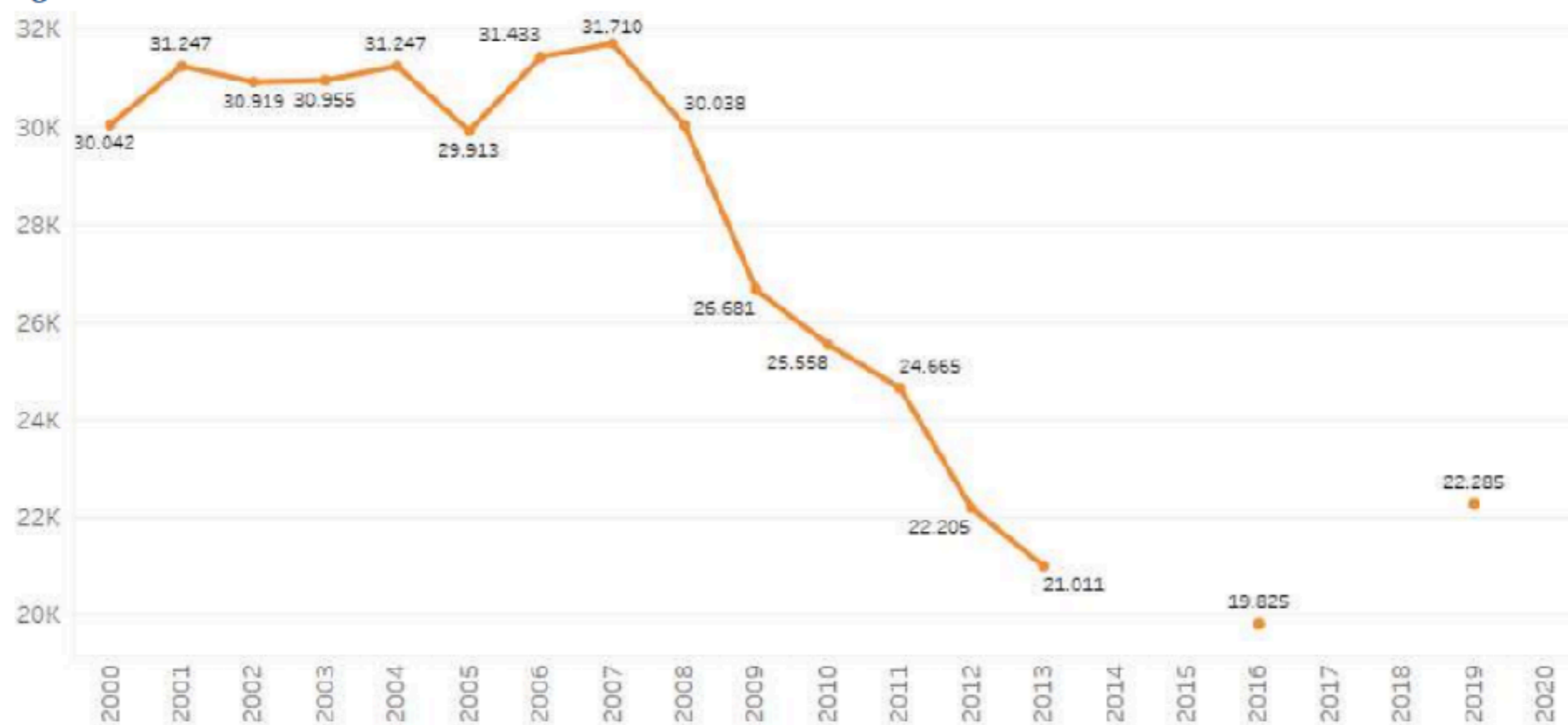
Average annual income at constant values

Figura 105 – Reddito annuo medio degli iscritti alla cassa

	2000	2005	2006	2007	2008	2009	2010	2011	2012	2013	2016	2019
Euro costanti 2020	30.042	29.913	31.433	31.710	30.038	26.681	25.558	24.665	22.205	21.011	19.825	22.285
Euro correnti	21.372	24.462	26.251	27.139	26.325	23.776	22.874	22.430	20.505	19.625	19.075	22.028

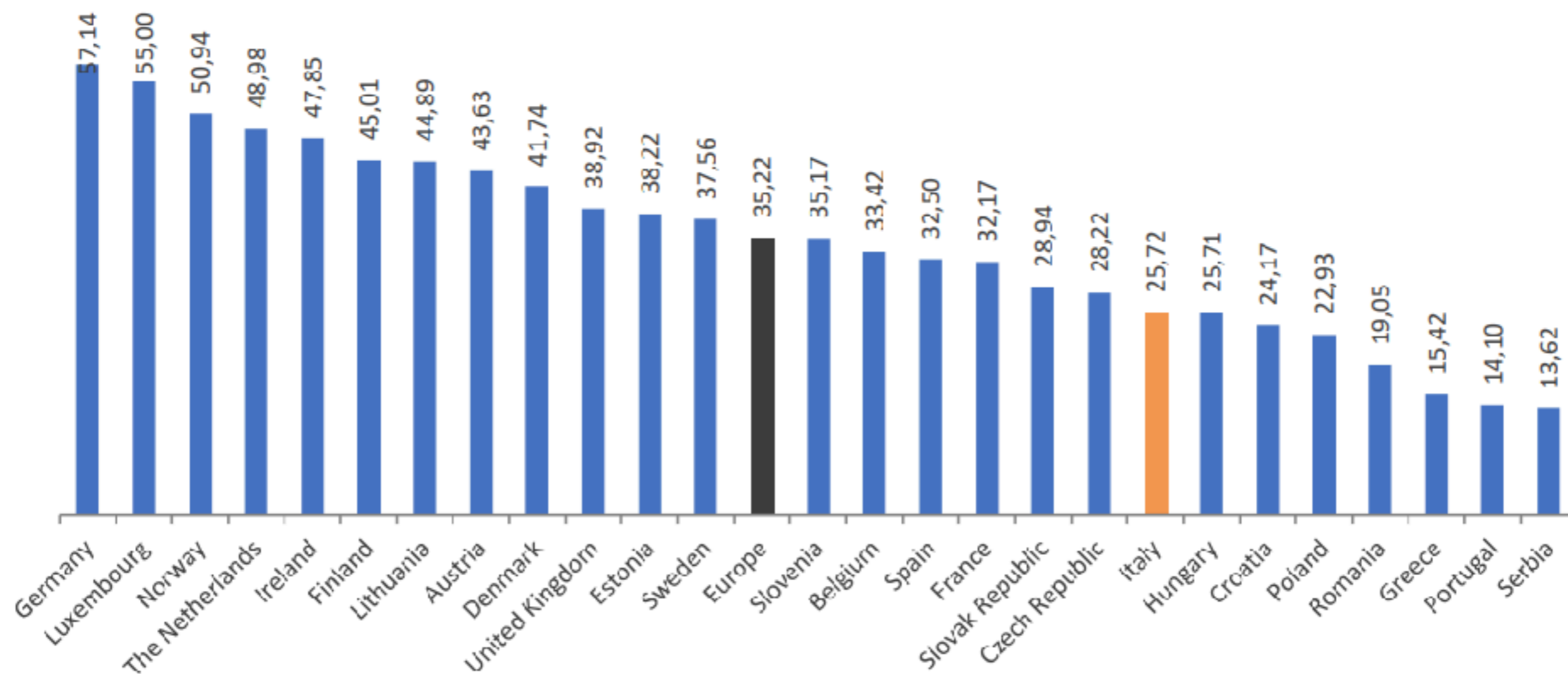
Fonte: Elaborazione CNAPPC su dati Inarcassa

Figura 106 – Reddito annuo medio a valori costanti 2020



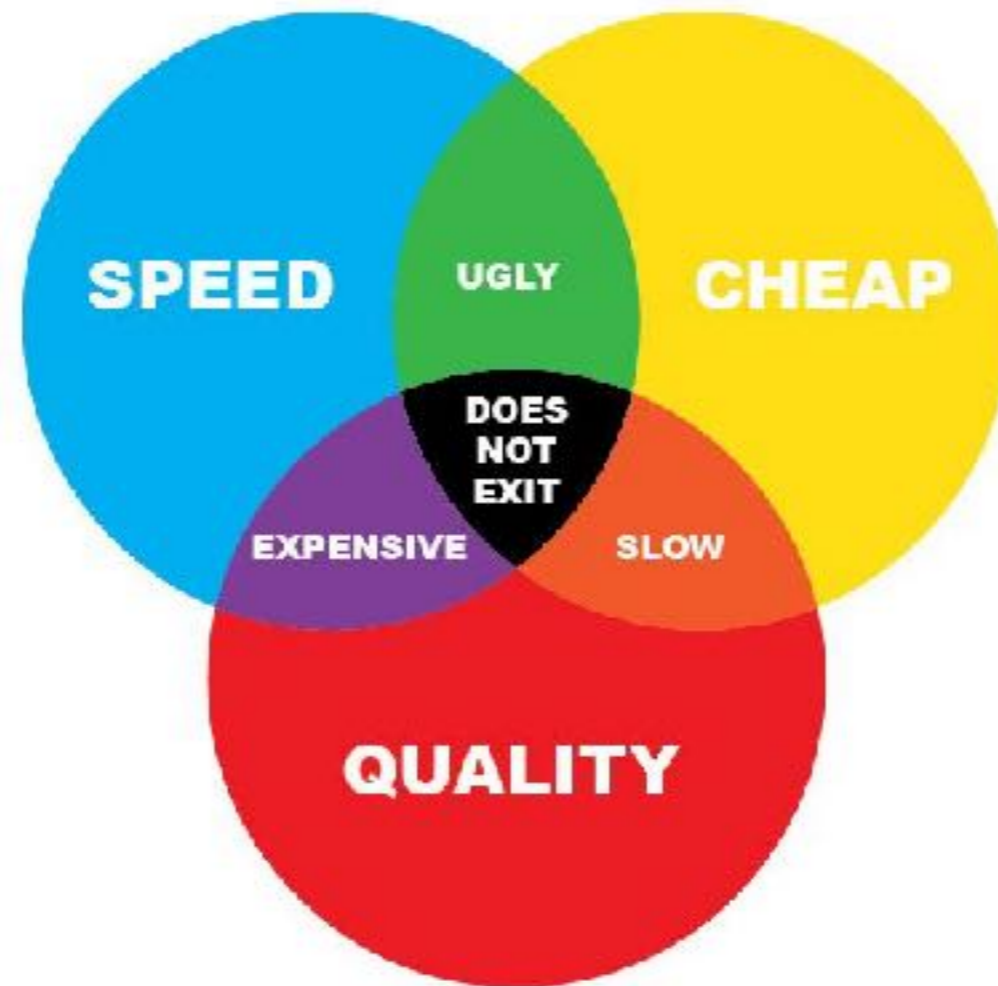
Fonte: Elaborazione CNAPPC su dati Inarcassa

**Figura 113 – Reddito mediano degli architetti europei misurato a parità di potere d'acquisto
(migliaia di euro a parità di potere d'acquisto, 2020)**



Fonte: Elaborazione CNAPPC su dati ACE

Dear clients,



**Kind regards,
designers**

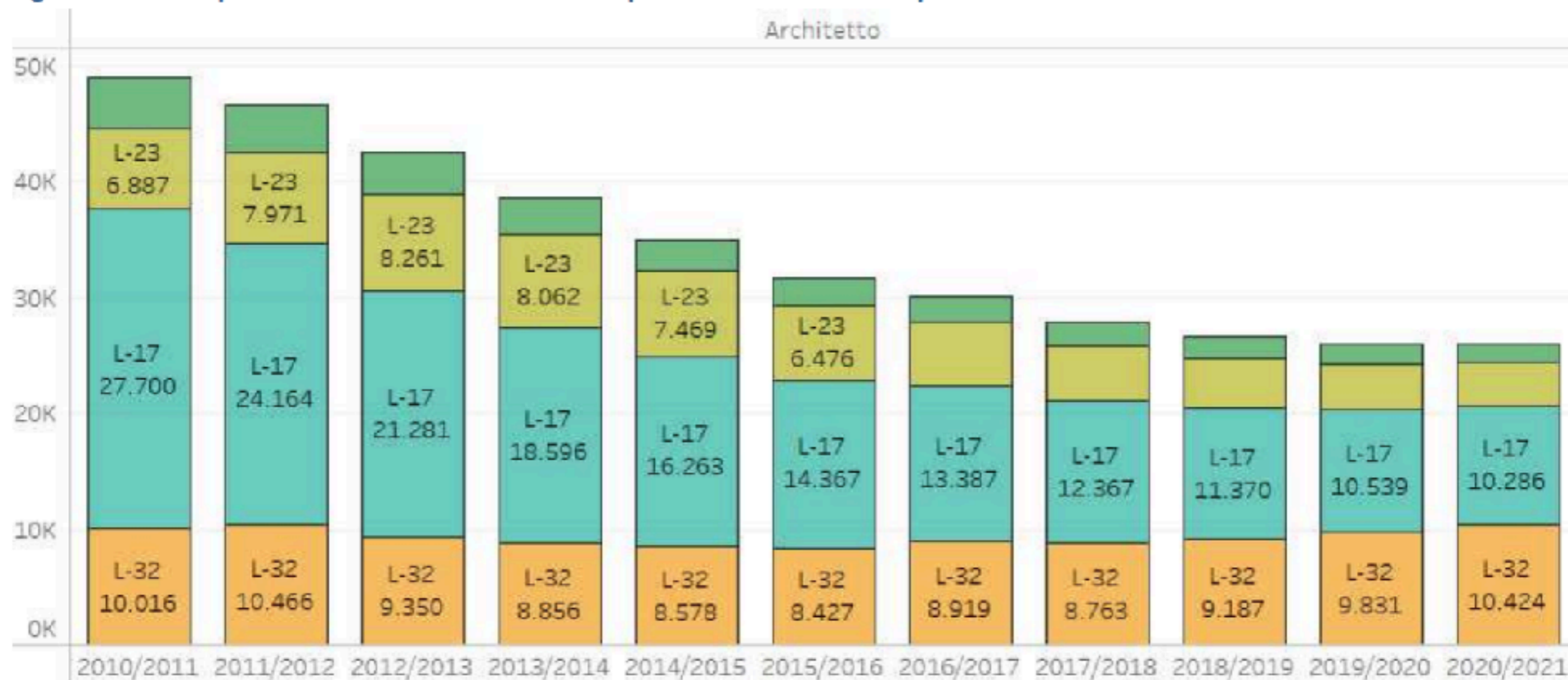
Education

Education, education, education....

Without education in the profession and beyond, we will not achieve anything. Education must relate not only to technical issues, but also to solidarity and professional ethics.

Composition of the number of enrolled students per bachelor degree

Figura 13 – Composizione del numero di iscritti per classe di laurea di primo livello



Fonte: Elaborazioni CNAPPC su dati MIUR

Please indicate (approximately%) how many architectural graduates complete the PPE?

- General Information
- Education
- PPE (Professional Practice Experience)
- Professional Practice
- Access to the market
- Tariffs and rates
- Market Access for foreign architects

Name of the country (please complete in bloc capitals)	Please indicate (approximately%) how many architectural graduates complete the PPE?
CZECH REPUBLIC	25
France	80
GERMANY	100
LATVIA	20
POLAND	30
Slovakia	60
Austria	
BELGIUM	
BULGARIA	
CROATIA	
CYPRUS	
Danmark	
ESTONIA	
FINLAND	
GREECE	
HUNGARY	
Ireland	
ITALY	
LITHUANIA	
LUXEMBOURG	
MALTA	
NORWAY	
PORTUGAL	
Romania	
SERBIA	
SLOVENIA	

The harmonization of education in Europe has made architects highly mobile as a profession and **we use the same language at work.**



Conclusion

Avoid the HCD scenario (Horse Carriage Drivers)

The profession of coachman was one of the most popular at the end of the 19th century. Newspapers wondered how to prevent large amounts of horse droppings in the future. In 1890 it was predicted that in 1930 there would be enough horse droppings in London to reach the first floor of tenement houses.

Technological progress has eliminated such transport. The expected problem never occurred. The profession of a Horse Carriage Driver has disappeared.

Architects pushed out of services by engineers also we have to do our homework and think about the future of the profession. We need to define our place and tasks in a changing world.

Let us prove that we are socially needed.

NCL

New Communication Language

As architects, we work hard to satisfy the Investor. Our wages often do not coincide with the time and energy we devote to the project. Then the Investor starts the optimization of the project and its commercialization. People who do this earn more than architects. This is because they can explain to the Investor what benefits their work will bring him. They speak a different language than architects.

As architects, we understand each other very well, but we cannot convince others that we are right. In an age of a cultural revolution like the New Bauhaus, we need to develop a new language of communication.

Who we are?

**We are champions,
of course....**

Architects' Council of Europe
Council des Architectes d'Europe

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Thank you for your attention!

ace-cae.eu



- **The Architectural Profession In Europe – ACE Sector Study**
- **Access to the profession: how does one become an architect? - ACE Area 1 - ENACA Comprehensive Survey**
- **La professione di architetto in Italia nel 2021**