



Archigraphie 2018

Meeting challenges through collaboration

With the third edition of Archigraphie, the Conseil National de l'Ordre des Architectes reviews a profession that, although affected by the 2008 economic crisis, has experienced an improvement in its situation since 2015 and continues to adapt to a changing environment.

The decline in commissions between 2008 and 2009, then between 2011 and 2015, corresponded to a reduction in the workloads and income of architects and a decrease in the number of practices.

Since 2015, in relation with the renewed activity in the building sector and the economic recovery in general, there have been signs of improvement in the situation of architects; in particular, an increase in their workloads driven by private sector commissions, and this despite the 8% decline in public commissions between 2015 and 2016.

Architects have maintained their market share in the construction sector and the number of architects in practice is relatively stable. Practice in firms continues to increase such that the number of architects in partnerships is almost equal to those of sole practitioners in 2017. This is the first choice of young architects who practice increasingly as partners in architectural firms. Experienced sole practitioners are less inclined to change their form of practice.

Based on a survey conducted by CREDOC among architects registered with the Ordre, this latest edition also highlights the transformations within

the architectural profession and the recourse to new working relationships.

Changes in the architect's position within the project design team, the impact of digital technology on professional practice, the diversification of the architectural profession and issues related to climate change are the most cited challenges for the future of the profession. In this context, changes are taking place within the profession, particularly through the development of new working relationships.

Nearly half of the architects surveyed, today work in a firm that collaborates with other professionals outside the project design team. These collaborations can involve very diverse consultants such as public relations professionals, citizens and end-user associations, botanists or sociologists. These collaborations can take several forms: the use of professional forums, coworking, social networks and Building Information Modelling (BIM). Although the use of these new working relationships differs according to the form and location of the practice. However, it does mark a real awareness of the need to open up to other professionals and continuing education, as architects have done and continue to do for the challenges of energy transition.

Confided to CREDOC by the Ordre this year, Archigraphie is therefore a valuable tool to understand the profession and its changes.

Archigraphie 2018 summary

Archigraphie enables to better know the architectural profession and this edition aims to analyse the different challenges and changes at work to anticipate the actions needed to support and boost activity in the sector.

In this latest edition, the focus is on the transformations of the architectural profession and the new working relationships used by the profession through a survey conducted by the CREDOC of architects registered with the Ordre.

Archigraphie is divided into four parts:

- The first part is dedicated to the socio-demographic evolution of the profession (based on CNOA and Pôle Emploi data), their incomes (from CIPAV, ARAPL, UNASA data) as well as data on architectural practices and their employees (Actaliens and OMPL data);
- The second part deals with the professional

integration of young graduates based on data from the Ministry of Culture survey;

- The third part analyses the main trends in the construction sector and their impact on the architects workloads through general data on the building industry (FFB, INSEE), data that concerns the activity of architects (MAF) and data that concerns their client characteristics within the specific market of the private house (EPTB survey of the Ministère de la Transition Ecologique et Solidaire);
- Finally, the fourth part highlights the transformations of the profession and the new working relationships of architects through a survey conducted by CREDOC for the Ordre.

The following highlights the main features of the architectural profession and its recent characteristic developments.

Main socio-demographic data of architectural profession today

- The number of new architecture graduates and the number of architects registered with the Ordre have stabilised since 2010. There were 3,728 architecture graduates in 2016-17 and 29,700 registered architects in 2017;
- The architect profession is aging at a pace comparable to that of the general French population. Between 2016 and 2017, the average age of architects registered with the Ordre increased from 50.5 years to 51 years. 52% of the architects registered with the Ordre are now between 45 and 64 years old. Those under 44 represent about one-third of all architects, while those over 65 make up about 14% of the profession;
- The geographical distribution survey of the architects registered with the Ordre across the country highlights the concentration of the number of architects in Île-de-France and the south of France. Young architects practice in highly urbanised areas, while their elders work mainly in the north-east and the south of France;
- Feminisation of the profession continues. In 2017, women represented 29% of those registered by the Ordre, an increase of 12 points since 2000. The feminisation of the architectural profession is even more evident among the younger generations. Women now represent almost half of all architects under the age of 35. However, women remain under-represented among sole practitioners and architects in partnership;
- Further, with the gradual feminisation of the profession, there are now just as many men as women among the architects registered as job seekers at Pôle Emploi, Category A;
- About 9 out of 10 architects work in partnership or as sole practitioners. Between 2008 and 2017, the number of sole practitioners fell on an average of 1% per year, and architects in partnership increased by an average of 4% per year, so the number in partnership almost equals that of the sole practitioners;
- The average age of newcomers registered with the Ordre increased from 2015 to 2017, which may suggest that architects start their career as employees without necessarily being registered with the Ordre;
- In 2016, the average income of architects is still below its highest level in 2007. Income disparities remain very high in the profession, which can be explained in particular by the level of experience and the type of activity undertaken. Wage gaps between men and women remain significant but continue to decline, especially among the younger generations of architects;
- The gross annual salary (full-time employment) of an employee working in an architectural firm is comparable to that of the legal and accounting sectors in 2015;
- The number of employers has been on a downward trend since 2008. As of 1st January 2016, the number of employers decreased by 12% compared to 2008.

Professional integration of young graduates

Archigraphie 2018 reviews the professional integration of young graduates in architecture. During the 2016-17 academic year, there were 1,417 graduates with HMONP certification (Habilitation à exercer la Maîtrise d'Œuvre en son Nom Propre), which represents its highest level since the establishment of the qualification. The increasing number of graduates following training to obtain this qualification is explained by the better labour market integration rates experienced by architects holding HMONP certification compared to Architectes Diplômés par l'Etat graduates.

The Ministry of Culture survey of architecture school graduates shows that, all courses combined, on average 73% of young graduates in architecture obtain their first employment within less than 6 months. However, the access period to the first job after graduation now tends to be longer compared to that of architecture graduates in 2010, 2011 and 2012.

The main conclusions of this second part of Archigraphie, drawn from the Ministry of Culture survey on architecture graduates in 2013, can be summarised as follows:

- More than 1 in 10 architecture graduates are in

a multi-activity situation. This ratio has increased by 3 points since 2010, even though there has been a decline in the multi-activity rate among architects by 0.6 points between 2015 and 2016;

- 84% of architecture graduates in 2013 report working in the professional fields of architecture, urban planning and built heritage;
- More than 8 in 10 recent architectural graduates report practicing in the architectural design field;
- 71% of recent graduates in the architectural field surveyed state that they are primarily practicing as employees;
- 83% of HMONP architects who practice as employees declare that they have a long-term employment contract;
- More than a third of graduates practice in Île-de-France; and
- Nearly 8 out of 10 graduates work in architecture practices.

Architect's position within construction sector

After several years of decline, in 2016 the construction sector recovered +1.9% in volume before sharply accelerating in 2017 +5% due to the strong growth in the new housing market. The architect's workload represents 42% in the building industry, this share has remained stable since 2012. Works declared by architects to the Mutuelle des Architectes Français, all commissions included, show a decrease in the workload of 3% between 2014 and 2015, followed by a 1% increase between 2015 and 2016.

The main conclusions of the third part of Archigraphie 2018 can be summarised as follows:

- In 2016, public sector commissions fell by 7.7% compared to 2015 while private sector commissions rose by 5% between 2015 and 2016;
- 70% of projects undertaken by architects concern the design of new buildings;
- More than half of the buildings confided to architects concern housing (in construction cost);

- While the workload has decreased since 2012, it has recovered since 2015 in terms of both value and volume;
- The architects workload is sustained in the collective housing market but continues to decline in the individual housing market;
- The single-family home market has been hit hard by the economic crisis since 2009 and the shrinking construction sector. Although the architects workload on the individual house remains low, since 2014 there has been a recovery with a number of private houses undertaken by architects of 3,026 million euros; and
- In regard to client characteristics in this market, there is a greater share of white-collar workers and professions than clients on other types of projects. Furthermore, those under 30 have little recourse to architects when building a private house. Finally, individuals using an architect are more likely to opt for a detached house delivered "completely finished".

Professional transformation and new working relationships

To highlight the new challenges facing architects, a survey was conducted online by CREDOC. During an initial period from 17 April to 30 May 2018, 26,400 architects received a 24-question survey to which 2,105 responded.

The architectural profession is today in the process of transformation and faces many challenges. 77% of the architects surveyed cited the evolution of the architect's position in the project design team and the challenges facing the future of the profession. In fact, the rise of technical and economic imperatives in the construction sector is reflected in greater diversification and specialisation of design team professions. The reduction in public commissions in a tight economic context since 2008 has pushed architects to focus more on the private sector (including individual clients). These different challenges have an impact on the architectural profession which has yet to find its place within this changing environment.

The impact of digital technology on the profession and the adaptation to new clienteles in face of a decline in public procurement are cited respectively by 63% and 37% of architects. Renovation and rehabilitation projects are not often undertaken by architects, although they could be a response to the changes within the profession. In addition, architects are aware of the environmental challenges to overcome the considerable impact of cities on the environment. 50% cite climate issues

as one of the challenges for the future of architects.

To meet these challenges, new working relationships are developing within the profession. This cooperation can range from simple online collaboration to interprofessional teams in working groups which are more likely to solve contemporary challenges. 45% of the architects, practicing as sole practitioners, partners and employees in the private sector, work in a practice that collaborates with other professions outside the field of the project design team. The sharing of workspace with other professionals is not widespread in the profession (it concerns only 21% of those who answered the survey). Professional forums and coworking are the main collaboration tools used by architects (used by respectively 35% and 22% of participants). The use of BIM is also developing in the profession and the demand for training in this tool is evident to architects.

Use of these new working relationships is contrasted according to the forms and location of practice. Collaboration with other professionals outside the project design team mainly concerns salaried architects from the private sector and is more common in large cities. Thus, even if these new working relationships are not yet used by the whole profession, they indicate an awareness of the need to cooperate more with other professionals.



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