Co-funded by
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ARCH E

ARCH-E:
Architects' Needs Report

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List of Abbreviations and special terms

ADC	Architectural Design Competition
NADC	National Architectural Design Competition
IADC	International Architectural Design Competition
SME	Small and Medium-sized Enterprises
ARCH-E	European Platform for Architectural Design Competitions
ARCH-E ADC MAP	Interactive map delivered by ARCH-E project
ARCH-E GLOSSARY	Interactive glossary in partners' language by ARCH-E project
ARCH-E NETWORK	Interactive network of architects aiming to collaborate by ARCH-E project
ARCH-E ADC SWOT	Interactive ADC evaluation tool by ARCH-E project
ACE	Architects' Council of Europe
UIA	International Union of Architects
EU	European Union

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Executive Summary

Executive Summary

The **ARCH-E Architects' Needs Survey** is a research initiative within the **European Platform for Architectural Design Competitions (ARCH-E)**, co-funded by the European Union under the Creative Europe framework. The survey aims to assess architects' experiences, challenges, and opportunities related to **Architectural Design Competitions (ADCs)**, particularly in transnational contexts.

1.1. Survey Objetives

It examines the barriers architects face in accessing these competitions, with a special focus on **small and female led practices**, which often encounter additional obstacles in securing commissions through ADCs. By evaluating the **interest and engagement of architects** in international competitions, the survey seeks to understand participation trends and whether ADCs offer viable career opportunities across different practice sizes and backgrounds.

A key aspect of the study is identifying **knowledge gaps and skill deficiencies** that hinder participation in ADCs. By analysing these challenges, the research aims to determine what kind of support architects need to **strengthen their competitiveness** in the international market. In addition to individual and firm-level constraints, the survey also examines **architects' professional networks and mobility** across borders Understanding the level of international networking among architects provides valuable insights into how connectivity and cooperation can be improved. Ultimately, the survey findings aim to inform **policy development and support mechanisms** that enhance access to ADCs, ensuring a **more inclusive and equitable** competition system.

1.2. Key Findings

1. The role and evolution of ADCs in Europe

ADCs have long been recognized as a vital mechanism for ensuring quality in public commissions. However, they have evolved from being **exclusive, high-profile competitions** to a more **regulated and standardized procurement tool** across European countries. While this transformation promotes fairness and transparency, it also introduces bureaucratic barriers, making access more challenging, particularly for **small firms and emerging practices**.

2. Architects' interest and participation in ADCs

- **National ADCs:** 69% of respondents have participated in a competition within their home country. However, **participation is significantly lower for women** (56%) compared to men (74%).

- **International ADCs:** Of the architects who responded to the survey, only 25% have participated in ADCs abroad at any stage of their professional careers, with women participating at an even lower rate (18%).

- **Motivations for participation:** Key drivers include **financial incentives, professional networking, and international recognition.**

- **Barriers to participation:** The most cited challenges include **financial constraints, language barriers, lack of knowledge on foreign regulations, and low perceived chances of winning.**

- Respondents who reported participation in international ADCs indicated a preference for engaging in **Switzerland, Austria, Germany, and Italy** (no reason specified).

3. Challenges and barriers in ADCs: Survey responses reveal several key obstacles that hinder participation in ADCs as:

- **Financial and structural constraints:** The **high cost** of preparing a competition proposal makes ADCs inaccessible for many small firms.

- **Lack of transparency and fairness:** Many architects expressed frustration with **unclear competition criteria** and a perception that **larger, well-established firms are favoured.**

- **Regulatory and legal barriers:** Differences in **public procurement rules** across countries create challenges for architects unfamiliar with foreign legal frameworks.

- **Linguistic and cultural barriers:** Competitions conducted in **unfamiliar languages** reduce accessibility for architects from different linguistic backgrounds.

4. Success rates and economic impact

- **Winning an ADC does not guarantee a commission.** Among those who have won first prize in an international ADC, only **35%** (of 17-18% who participated in international ADC) **secured a contract.**

- **Limited financial returns:** Over **70% of respondents reported earning no revenue** from international ADCs, indicating that competitions are not a sustainable business model for many firms.

- **Firm size disparities: Medium and large firms** have a higher success rate in securing commissions, whereas **small practices struggle** to translate competition wins into actual projects.

5. Strategies for improvement: The survey highlights several recommendations to enhance architects' access to ADCs:

- **Clear and harmonized regulations:** Establishing a **common economic threshold for internationalization** of ADCs can reduce disparities between countries.

- **Better support for small and emerging practices:** Offering **financial assistance, mentorship, and training programs** can improve accessibility.
- **Enhancing transparency and fairness:** Implementing **clearer evaluation criteria** and reducing administrative burdens can make international ADCs more equitable.
- **Improving information accessibility:** Strengthening **national and EU-wide communication channels** can help architects stay informed about ADC opportunities.
- **Encouraging local and regional engagement:** While international ADCs are valuable, **supporting locally based architects** in accessing these ADCs, even in an international framework, might help to ensure a **culturally relevant and context-sensitive approach** to design competitions.

1.3. Conclusion

The **ARCH-E Architects' Needs Survey** provides an in-depth analysis of the state of ADCs in Europe (partner and cooperation partner countries of ARCH-E project), revealing both opportunities and challenges. While ADCs remain a decisive mechanism for ensuring high-quality architecture, current regulatory and financial constraints **disadvantage small firms and female-led practices and uncertainty in post-competition commission stresses medium and large practices**.

By addressing these barriers through **policy reforms, financial support, and increased transparency**, ADCs can become more inclusive and accessible, ultimately fostering a stronger and more diverse architectural landscape across Europe.

The European Commission states that SMEs represent the majority of businesses in the EU. Enrico Letta's report *Much more than a market* [1] includes a chapter titled "Unleash the potential of European SMEs," which emphasizes their role in the EU's economic strength. SMEs employ about two-thirds of the EU workforce and contribute slightly more than half of its value-added.

Most architectural practices in the EU are SMEs. Supporting them through ARCH-E outputs supports both qualitative goals and economic objectives. In alignment with Letta's report, ARCH-E emphasizes the role of an easy-to-navigate ADC system in supporting SMEs as part of building a more inclusive, sustainable, and resilient European model.

[1] Enrico Letta, "Much More than a Market. Speed, Security , Solidarity. Empowering the Single Market to Deliver a Sustainable Future and Prosperity for All EU Citizens," n.d., https://www.consilium.europa.eu/media/ny3j24sm/much-more-than-a-market-report-by-enrico-letta.pdf.

2
Introduction

Introduction

ARCH-E, The European Platform for Architectural Design Competitions is an EU project co-funded by the European Union under the Creative Europe framework (CREA) developed by a consortium of ten partners and five cooperation partners from EU countries and institutions.

ARCH-E goals aim to promote the use of Architectural Design Competitions (ADCs) and advocate for a more inclusive and accessible ADC culture in Europe. The initiative also focuses on supporting small practices -many times headed by female architects-, recognizing that over 80% of architectural practices in EU countries consist of just one or two people. [2] As stated in ARCH-E application documents and website: [3]

> *"ARCH-E's main objective is to promote high-quality architectural solutions for the built environment by increasing the use of Architectural Design Competitions (ADC) in Europe and by helping architects overcome cross-border barriers, especially for small and/or female-led practices. The amount of cross-border participation in ADCs is critically low. ARCH-E aims to create a more accessible ADC landscape that incorporates the core principles of New European Bauhaus, the Davos Declaration and Baukultur as defined by ACE. ARCH-E's consortium, reaching over 560,000 architects, is pursuing these goals through the means of research, practical support and political advocating."*

It is also worth mentioning the importance of supporting SME through improving ADC system. [4] Enrico Letta's report *"Much more than a market"* [5] dedicated a chapter to SMEs, "Unleash the potential of European SMEs" where it is stated,

> *"The European Union's economic strength rests on the shoulders of its many millions of small and medium enterprises (SMEs). Employing approximately two-thirds of the EU workforce and accounting for a bit more than half of its value-added, they play a vital role in every economic sector. SMEs are catalysts for innovation, tackling pressing issues like climate change, resource efficiency, and social cohesion, spreading their solutions throughout Europe. Deeply embedded in Europe's socio-economic fabric, they create two-thirds of all jobs, offer training opportunities across regions and skill levels (including those traditionally underserved), and contribute to societal well-being, particularly in remote areas."* [6]

As observed in this research, most architectural practices in the EU are small and medium-sized enterprises (SMEs). Supporting these SMEs through

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[2] Azis Mirza and Vincent Nacey, "The Architectural Profession in Europe. 2022 Sector Study" (Brussels, 2023), 35, https://www.architect.be/sites/default/files/2023-10/2022 ACE Report EN 1408_0.pdf.
[3] ARCH-E consortium, "ARCH-E: The European Platform for Architectural Design Competitions," 2024, https://www.arch-e.eu/.
[4] European Commission," SME definition, n.d., https://single-market-economy.ec.europa.eu/smes/sme-fundamentals/sme-definition_en.
[5] Letta, "Much More than a Market. Speed, Security , Solidarity. Empowering the Single Market to Deliver a Sustainable Future and Prosperity for All EU Citizens."
[6] Letta, 107.

ARCH-E outputs not only advances important qualitative goals—such as cultural vitality, innovation, and social cohesion—but also serves pragmatic economic objectives, including job creation, regional development, and competitiveness. In line with the vision outlined in Enrico Letta's report, ARCH-E highlights the need to view the EU not merely as an economic space, but as a community where supporting SMEs through a well-organized ADC international system contributes to a more inclusive, sustainable, and resilient European model.

Architectural Design Competitions (ADCs) are generally recognized as one of the most effective ways to ensure architectural quality in public commissions. This may explain why most EU countries include ADCs (or contests) as a standard procurement method, typically governed by national regulations and managed through public procurement platforms. However, the definition and interpretation of ADCs can vary across countries. To ensure clarity and consistency, the research group adopted the definition provided by the **International Union of Architects (UIA)**, which defines ADCs as:

> *"Competitions in architecture, town-planning, landscape and other related fields are design contests to evaluate multiple proposals in a formalised procedure. Designs are compared on the basis of a specified task, a defined program and evaluation criteria, all of which are announced in advance, and anonymously assessed by a professional and independent jury."* [7]

Additionally, the **ARCH-E Glossary** expands on this definition by incorporating each country's specific approach to Architectural Design Competitions, reflecting the nuances in how they are understood and implemented across Europe. The glossary serves as a comprehensive reference, covering nearly one thousand related terms to provide a broader and more detailed perspective on the terminology and practices associated with ADCs.

In addition to the ARCH-E Glossary, the ARCH-E project has introduced a range of innovative tools to enhance transnational engagement and support the development of Architectural Design Competitions (ADCs) across EU countries. These include a dedicated website and supporting documents designed to facilitate cross-border collaboration. The initiative focuses on three key instruments: the **ADC Map,** the **interconnected multi-language Glossary**, and the **Architects' Needs Survey**, each playing a necessary role in fostering a more accessible and integrated ADC culture in Europe. The ARCH-E project also offers an **online ARCH-E Network** to enhance connectivity among architects, which is likely the most impactful outcome of the initiative.

Additionally, it provides a **SWOT tool** designed to assess ADC proposals in their early stages, helping stakeholders evaluate strengths, weaknesses, opportunities, and threats to improve competition strategies

[7] Esa Mohamed and Thomas Vonier, "GUIDELINES UIA COMPETITION GUIDE FOR DESIGN COMPETITIONS IN ARCHITECTURE AND RELATED FIELDS" (Paris, 2020), 8, https://www.uia-architectes.org/wp-content/uploads/2022/02/2_UIA_competition_guide_2020.pdf.

2.1. Study 3: The online survey on Architects' Needs

The **online survey (Study 3)** builds upon data collected in earlier phases of the project, ensuring a comprehensive and layered approach to understanding Architectural Design Competitions (ADCs). **Study 0** provided contextual insights into the participating countries, while **Study 1** developed the ADC Map, and **Study 2** focused on the online Glossary, a multilingual and interconnected resource aimed at standardizing terminology across borders.

During the first **partnership meeting in Ljubljana**, the project partners identified five key research topics that shaped the structure of the survey:

- **Accessibility**: Investigating barriers that prevent architects from participating in ADCs.
- **Quality**: Examining engagement levels in ADCs at both national and international levels.
- **Regulations**: Identifying best practices through responses on legal and procedural frameworks.
- **Transparency**: Assessing perceptions of openness in ADCs across different countries.
- **Benefits for stakeholders**: A newly introduced theme in Ljubljana, leading to a dedicated set of survey questions.

Building on these core themes, the **online survey (Study 3)** seeks to further the project's research by examining the key questions outlined in the application. Consequently, this survey aims to provide a structured analysis of architects' engagement with **transnational ADCs**, identifying challenges, motivations, and potential areas for improvement within the existing framework by responding these main lines of inquiry:

- **Architects' interest in transnational ADCs,**
- The **knowledge, skill gaps, and barriers** they face,
- Their level of **international networking**, and
- **How the ARCH-E project can support** their professional growth and development.

Briefly, the **primary objective** of this survey is to highlight the challenges architects encounter when participating in ADCs in foreign countries. The findings will serve as a foundation for developing targeted recommendations for **Chambers and Associations of Architects**, helping them provide better support for cross-border participation.

For achieving that, this report first analyses and interprets the collected data, presenting the findings in a **clear, structured, and visually engaging** manner to enhance understanding and guide future actions.

Secondly, this report aims to provide a **comprehensive account** of the survey process and its findings, exploring their connections with other **ARCH-E tools**, insights from **partner meetings**, and the **2022 ACE Sector Study.**

Thirdly, by examining how these elements interact, it contributes to a broader understanding of Architectural Design Competitions (ADCs) across Europe, highlighting **key trends, challenges, and opportunities for improvement.**

3
About the survey and the data analysis

About the survey and the data analysis

3.1. Asking for architect's needs in EU

The ACE Sector Study 2022 report shows that the profession is organized in small offices or firms—almost 80% of architecture offices have fewer than three people—across all the project partner countries and throughout the rest of Europe. This scenario presents challenges in formulating the survey questions, particularly in determining whether they should be directed at the individual respondent or at the firm they represent. Accordingly, to this situation, the questionnaire is designed to capture the personal experiences of architects regarding their opportunities and challenges in entering and succeeding in such competitions, and it tries to reflect the perspectives of their respective firms when possible. To establish detailed participant and firms' profiles, the survey collects intersectional data—including age, gender, and economic background—that are relevant to their professional experiences as architects as well as for their firms.

3.2. Data collection and data analysis

After an extensive design and collaborative process that involved multiple in-person and online meetings, the survey was carefully developed, translated into seven languages, and launched online on September 30, remaining active until October 21, 2024. This rigorous process ensured that the survey was culturally and linguistically tailored to capture a broad range of perspectives from across Europe.

The survey questions were supervised by Dr. Antonio Ariño,[8] a Spanish sociologist with expertise in online research methodologies from the University of Valencia (Spain). Dr. Ariño highlighted that, due to the online nature of the survey, it was not possible to stratify or pre-sample the target population. As a result, the survey is primarily designed to identify emerging trends and lines of inquiry. While these preliminary findings will require further investigation through more statistically robust methods, the insights gleaned are invaluable. They not only complement the data presented in the ADC Map—a tool that offers a geospatial overview of transnational Architectural Design Competitions—but also provide actionable information for Chambers of Architects to refine their support policies for firms of all sizes.

[8] Dr. Antonio Ariño Villaroya is a Professor of Sociology at the University of Valencia's Faculty of Social Sciences. With a degree in Geography and History and a PhD in Sociology, his research in the Sociology of Culture, Welfare Policies, and Sociological Theory has earned him national recognition, including an award for "La ciudad ritual." He has directed several research observatories, is currently the director of the IAM Institute of Social Sciences and has received multiple research awards. In addition, he has taught General Sociology, Sociological Theory, and Sociology of Culture, and held various leadership roles—most recently as Vice-Rector for Culture and Equality—while also serving as Vice-President of the Spanish Sociology Federation.

To ensure clarity and facilitate the production of meaningful visual data, most survey questions were structured with preset responses. However, to capture nuances and unexpected insights, a series of open-ended questions were also included. This balanced approach helps illuminate both general trends and unique individual experiences within the architectural community.

During its active period, the survey received 1,290 responses from over 20 EU countries, underscoring the transnational relevance of the ARCH-E project. The responses were initially compiled into seven separate Excel files, then meticulously translated into English, harmonized, and merged into a single comprehensive dataset. This unified dataset was subsequently analysed with great care, resulting in the creation of charts that aim to be both meaningful and impactful. The integration of these findings with the interactive ADC Map further enhances our understanding of the geographic distribution and dynamics of transnational Architectural Design Competitions, thereby strengthening the overall recommendations for professional institutions.

When considered in general, the answers in the survey not always were reweighed to balance the actual proportions of the countries. Also, not all EU countries took part in the survey. The results are therefore not representative of the figures for Europe as a whole but, nevertheless, they are meaningful, pointing out trends and areas for future research and actuation.

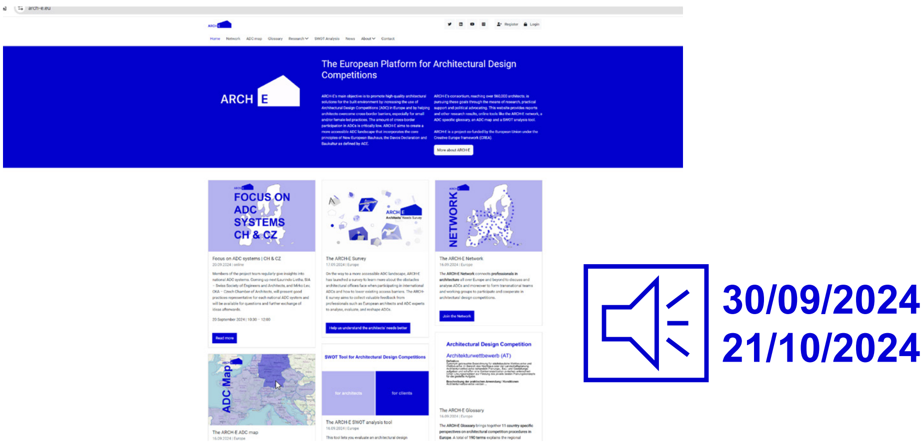


Figure 3.1: Period when the Architects' Needs survey was operative.

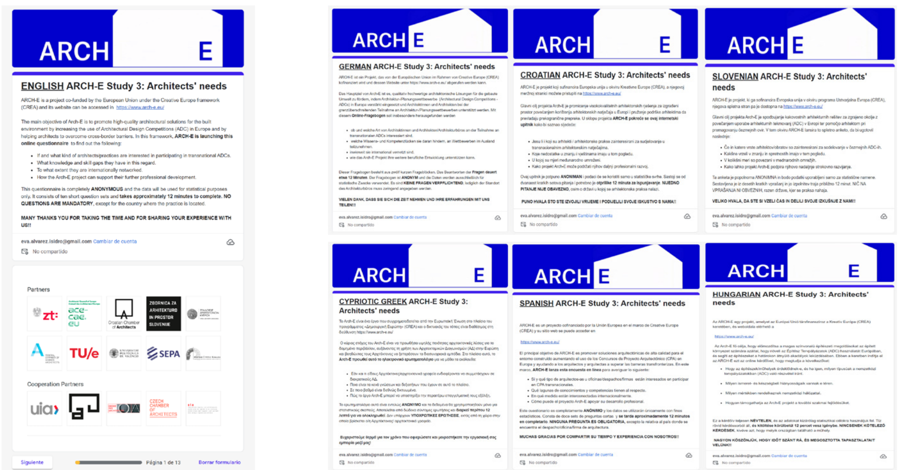


Figure 3.2: Image of the same survey delivered in six EU languages and English.

4
Survey Context

Survey Context

4.1. Responses framework

The context of the ARCH-E partner countries, where the survey was launched and whose results we are analysing, is highly diverse. This diversity is evident not only in their total populations and demographic distributions but also in the number of registered architects and the ratio per 100.000 inhabitants.

For example, **Germany and Spain have the largest populations** and consequently the highest absolute numbers of architects and architecture firms. However, they do not lead in terms of architects per 100.000 inhabitants: **Cyprus holds the highest ratio,** while Croatia, interestingly, approaches Spain's ratio. Conversely, at the lower end, the Czech Republic records the fewest architects per 100.000 inhabitants, followed by the Netherlands and Austria.

In terms of architectural design competitions offered relative to the number of registered architects, **Austria stands out** with the highest ratio, followed by the Czech Republic and Slovenia. Germany hosts the highest number of architectural competitions, yet it also boasts the largest absolute number of architects and ranks second in the ratio of architects per 100.000 inhabitants and the fifth in the ratio of number of competitions per registered architects.

Regarding other aspects—such as gender distribution among both the general population and the profession, GDP, and various additional indicators—it is advisable to consult the **ARCH-E Map**, where all these data are comprehensively compiled.

Within this context, the survey received **1.290 responses from over 20 EU countries**, thereby surpassing the overall target of 500 responses. If we only consider responses by partner countries and cooperation partners, the number of responses to be analysed is 1270.

Germany is the country that provided the most responses (77.8%). The contributions from the other participating countries varied and should be interpreted in the context of the potential number of architects who could have responded to the survey.

Country of residence	Total responses	Population	Registered architects	Total ADCs	Registered architects per 100.000 INH	ADCs per registered architects
Austria	73	9104772	6226	111	68.38	0.018
Belgium	3	11742796	15200	100	129.44	0.007
Croatia	70	3850894	3605	19	93.61	0.005
Czech Republic	4	10827529	4200	52	38.79	0.012
Germany	1003	84358845	119400	461	141.54	0.004
Hungary	27	9599744	8888	12	92.59	0.001
Cyprus	5	920701	3108	3	337.57	0.001
Slovenia	18	2116972	1613	20	76.19	0.012
Spain	64	48085361	50000	62	103.98	0.001
The Netherlands	3	17811291	10714	67	60.15	0.006

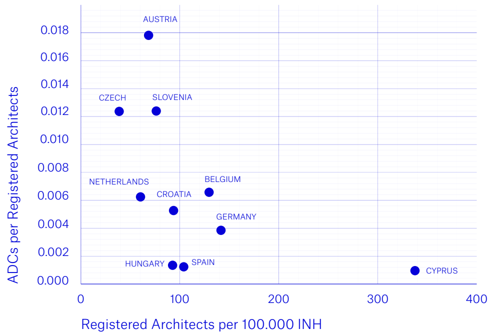


Figure 4.1: ADCs per registered architects (Y axis) and registered architects per 100.000 inhabitants (X axis).

When analysing the ratio between the number of responses obtained and the total number of architects in each country who could have participated in the survey, **Croatia emerges as the most engaged country**, followed by Slovenia, Austria, and Germany. In contrast, the response intensity from other countries falls significantly below their expected capacity. Notably, the Netherlands and Spain stand out in this regard, possibly due to the absence of official participation from their respective professional bodies (BNA and CSCAE) in this project. This is despite a strong dissemination campaign and active efforts to encourage responses in both countries, particularly in Spain.

The high response levels from Croatia, Slovenia, Austria, and Germany highlight these countries' established practices in regulating, adapting, promoting, and organizing the profession, as well as the strong interest in architectural design competitions, national or international, from both professional institutions and architects themselves.

This situation leads to analysing the collected data in two ways: either globally, by aggregating responses from all participating countries, or specifically, by focusing on these four countries, depending on the aspect under examination.

>20
EU countries

1290
Total responses

1270
Total responses of partners countries and cooperation partners

Country of residence	Women	Men	N.S.	Total responses
Austria	19	50	4	73
Belgium	3	0	0	3
Croatia	42	26	2	70
Czech Republic	0	4	0	4
Finland	0	1	0	1
France	1	0	0	1
Germany	256	711	36	1003
Greece	1	0	0	1
Hungary	4	22	1	27
Italy	2	1	0	3
Latvia	1	0	0	1
Luxembourg	0	2	0	2
Portugal	1	0	1	2
Cyprus	3	2	0	5
Romania	0	1	0	1
Slovenia	10	8	0	18
Spain	17	45	2	64
The Netherlands	2	1	0	3
Other country	2	7	0	9
Total	**363**	**881**	**46**	**1290**

Figure 4.2: Distribution of total survey responses by respondents' country of residence and sex assigned at birth.

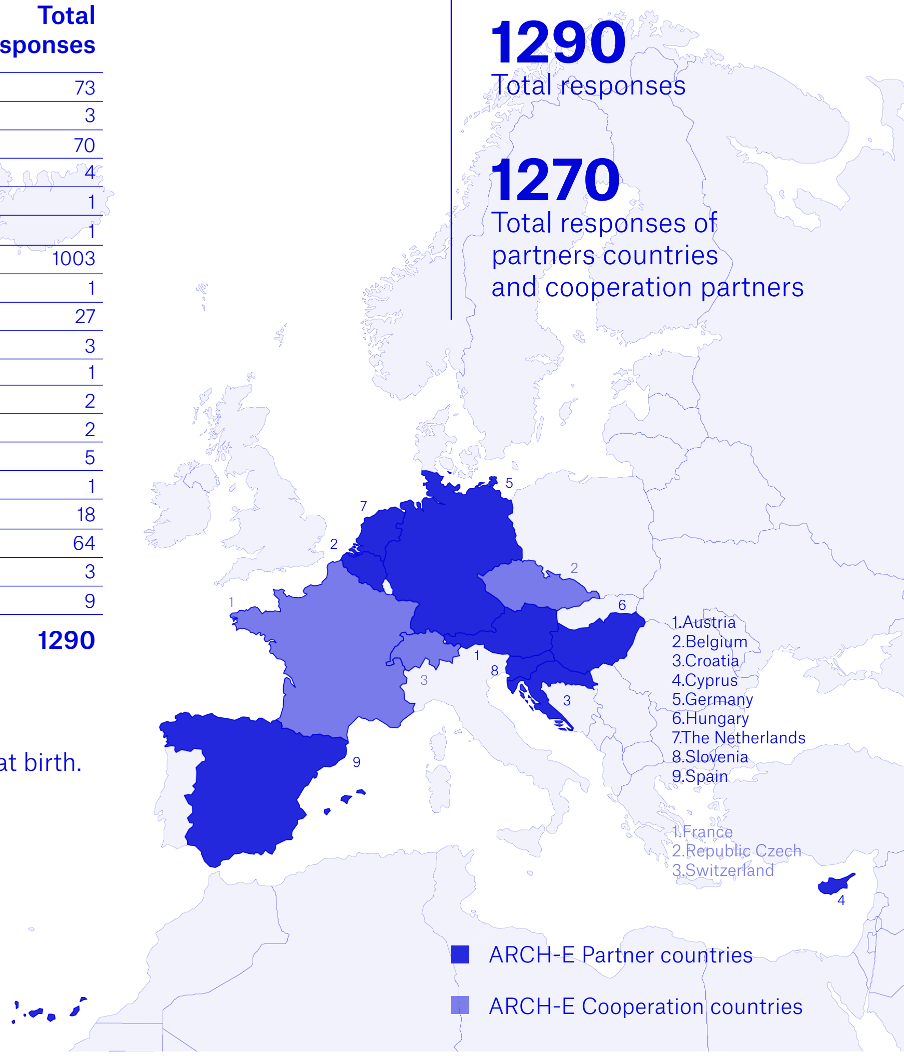


Figure 4.3: Map of ARCH-E partner countries and cooperation countries.

Ratio of responses by country

1270
Total responses of partners countries

0.57 %
Global ratio of responses per number of registered architects

1.81 %
Global ratio of responses per number of registered architectural offices

Country of residence	Total responses	Registered architects	% Responses per architects	Registered arch. offices	% Responses per arch. offices
Austria	73	6226	1.09	2586	2.63
Belgium	3	15200	0.02	3589	0.08
Croatia	70	3605	1.94	903	7.75
Czech Republic	4	4200	0.10	1280	0.31
Germany	1003	119400	0.84	37844	2.65
Hungary	27	8888	0.30	1333	2.03
Cyprus	5	3108	0.16	994	0.50
Slovenia	18	1613	1.12	1024	1.76
Spain	64	50000	0.13	13625	0.47
The Netherlands	3	10714	0.03	6820	0.04

Figure 4.4: Ratio of responses in partner and cooperation partners countries per number of registered architects and registered architectural offices.

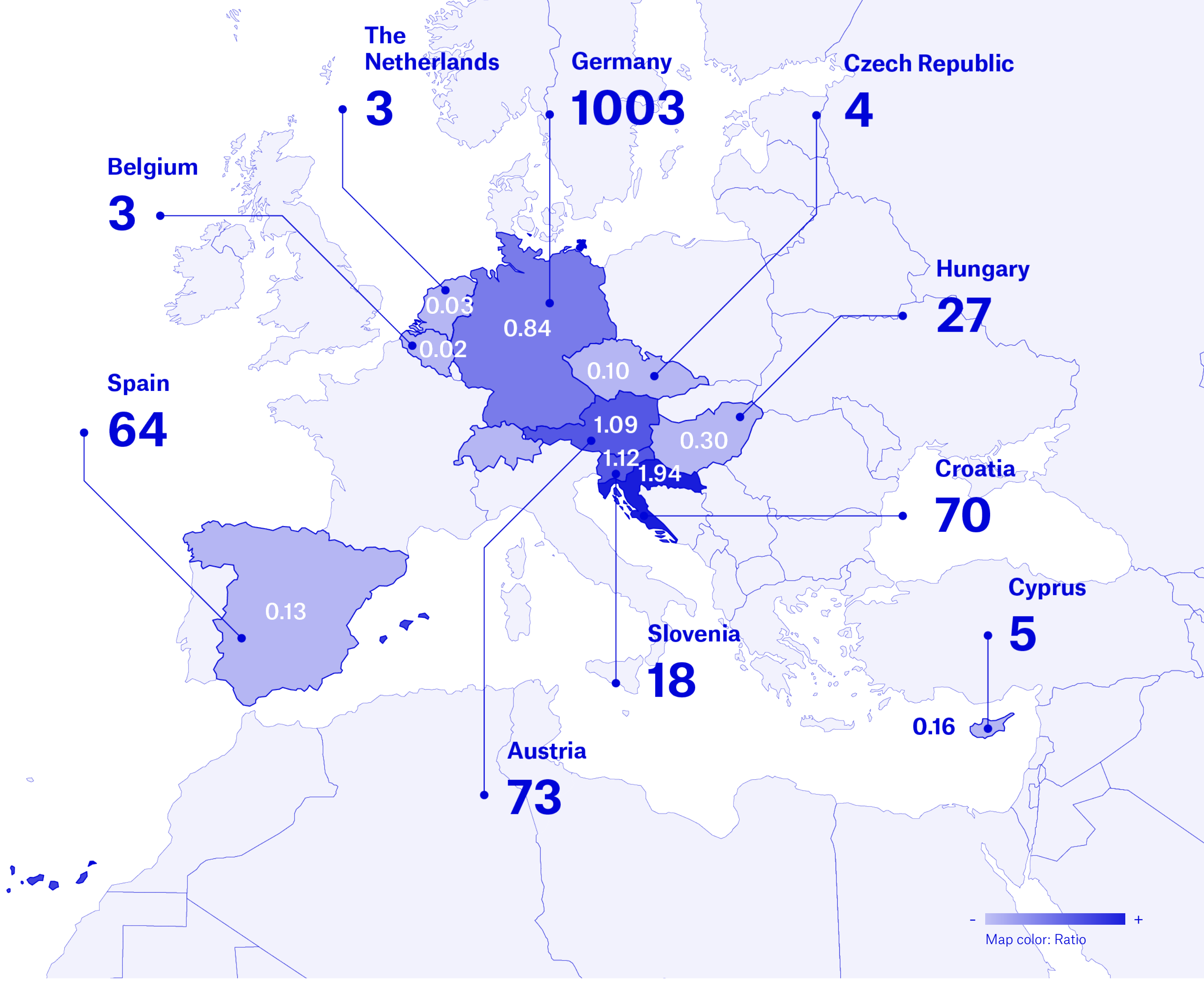


Figure 4.5: Total number of responses by country and ratio of responses from registered architects.

4.2. Respondents’ profile as individuals

Overall, most survey responses come from **individuals residing in Germany (76% of responses)**. When aggregating data across all participating countries, **most respondents are men (68%)**. However, when analysed individually, every country shows a male-majority response rate **except for Croatia, where 60% of respondents were women, and Slovenia, where women accounted for 56% of the responses.**

Most respondents, overall, are **over 50 years old (34.6%)**, hold a degree or equivalent qualification, and are owners or co-owners of the office or firm where they work, highlighting a predominance of experienced professionals in the sample. On average, respondents **work between 40 and 50 hours per week (45.3%)**, reflecting a demanding professional commitment. In terms of income, most report a **gross annual salary ranging between 30.000 and 60.000 euros (36.3%)**, and declare to have been **working more than 21 years (53.2%)**.

Regarding the professional specialization of respondents, the majority—both men and women—identify **architecture as their primary field of expertise**, reflecting the central role of architectural practice in the profession. Among women, urban planning emerges as the second most common specialization, followed by interior design, highlighting a broader engagement in spatial and functional design aspects. In contrast, while urban planning is also a significant area of expertise among male respondents, structural design and calculation appear more prominently in their profiles compared to women, suggesting a stronger focus on technical and engineering-related aspects of the profession.

Additionally, and introducing the factor of firms’ size, respondents from **small firms, report possessing a broader range of skills compared to those working in larger firms**, regardless of gender. This indicates a more versatile professional profile among architects in smaller offices, who often need to engage in multiple aspects of a project, from concept development to technical execution. Conversely, architects in larger firms tend to have more specialized roles with clearly defined responsibilities, aligning with the structured workflows and division of labour typically found in bigger practices.

Distribution by sex assigned at birth

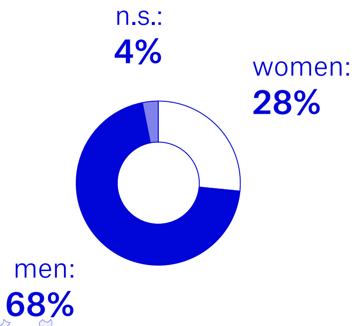


Figure 4.6: Global distribution of respondents by sex assigned at birth.

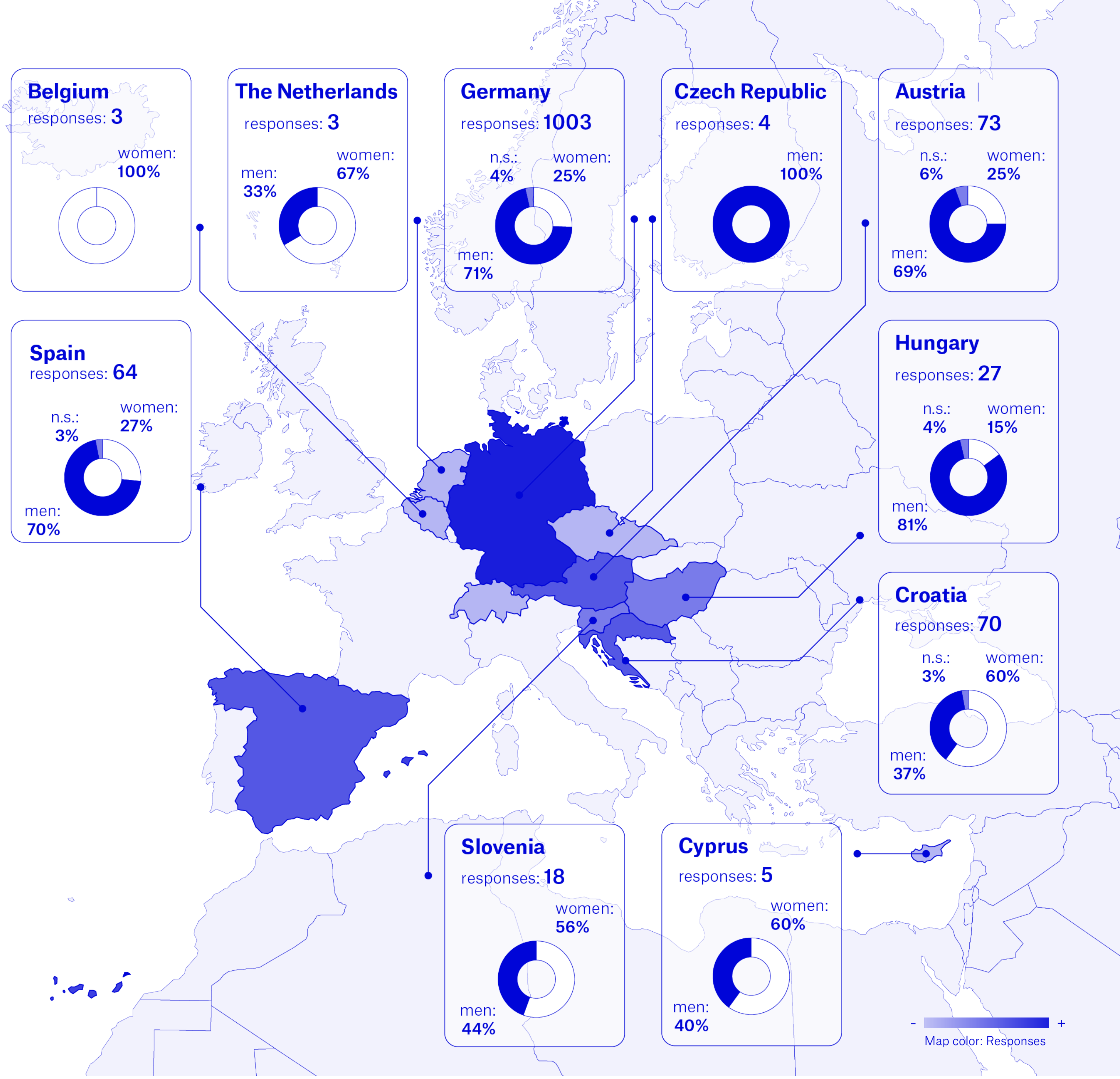
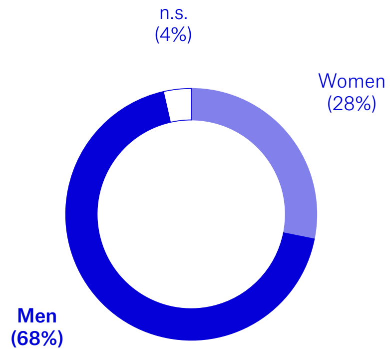


Figure 4.7: Distribution of respondents by sex assigned at birth in participating countries.

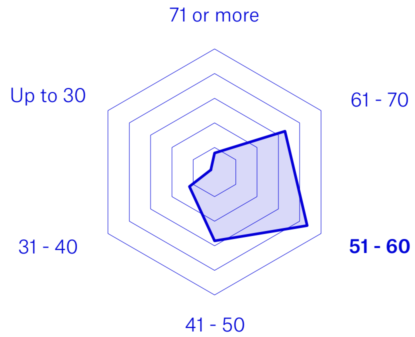
Sex at birth



Female	363	28%
Male	**881**	**68%**
Not specified	46	4%

Figure 4.8: Respondents' sex assigned at birth distribution (percentage).

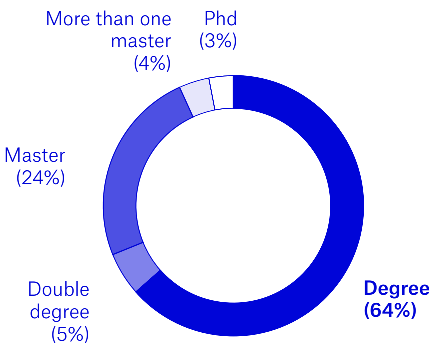
Age



71 or more	77	6%
61-70	331	26%
51-60	**435**	**35%**
41-50	280	22%
31-40	118	10%
Up to 30	17	1%

Figure 4.9: Respondents' individual age (value).

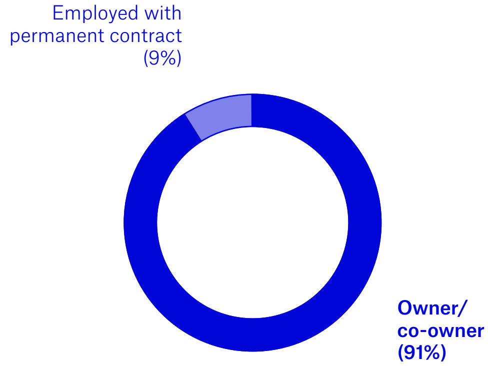
Studies



Degree or similar	**775**	**64%**
Double degree	66	5%
Master or similar	297	24%
More than one master	46	4%
Phd	37	3%

Figure 4.10: Respondents' individual studies (percentage).

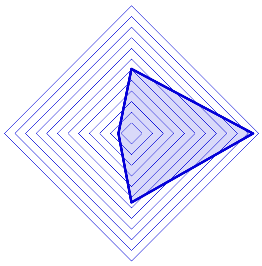
Status in the firm



Employed with a temporary contract	1	0%
Employed with permanent contract	95	9%
Owner/co-owner of a company/firm/office or freelance	**974**	**91%**

Figure 4.11: Respondents' individual status in the firm/practice (percentage).

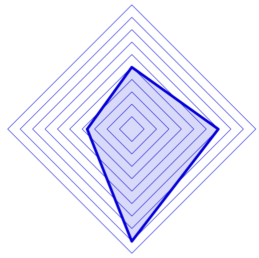
Working hours



Less than 20 hours per week	62	4.9%
20 - 40 hours per week	324	25.7%
40 - 50 hours per week	**573**	**45.4%**
More than 50 hours per week	303	24%

Figure 4.12: Respondents' individual working hours distribution (value).

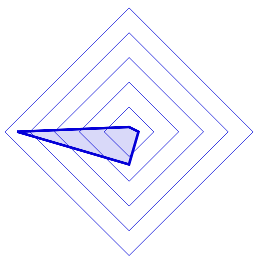
Annual salary



Less than 30.000 € per year	180	14.6%
30.000 - 60.000 € per year	**452**	**36.8%**
60.000 - 100.000 € per year	349	28.4%
More than 100.000 € per year	249	20.2%

Figure 4.13: Respondents' individual gross annual salary distribution (value).

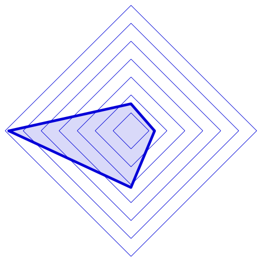
Years experience



Up to 5 years	38	3%
6 - 10 years	77	6%
11 - 20 years	264	21%
21 years or more	**902**	**70%**

Figure 4.14: Respondents' individual years of experience (value).

Years operation

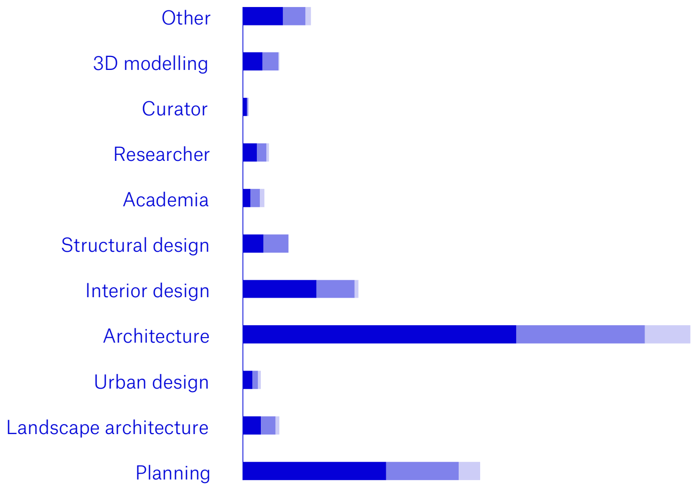


Up to 5 years	151	12%
6 - 10 years	132	10%
11 - 20 years	316	25%
21 years or more	**681**	**53%**

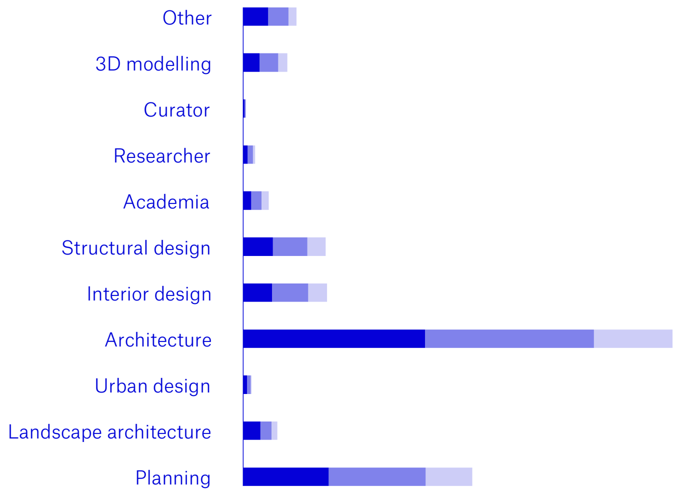
Figure 4.15: Respondents' individual years operation (value).

Expertise as architect by firm size

Women



Men



Firm size: Small (1-2 P) · Medium (3-10 P) · Large (11- More than 50 P)

Women

Respondents expertise as architect by firm size.

		Planning	Landscape architecture	Urban design	Architecture	Interior design	Structural design	Academia	Researcher	Curator	3D modelling	Other	Total	
Small	1P	116	17	7	218	56	17	5	10	1	17	34	498	669
	2P	38	2	3	76	23	5	3	5	3	4	9	171	
Medium	3-5P	53	12	6	95	28	20	7	7	1	9	18	256	368
	6-10P	25	4	0	43	13	7	3	3	0	8	6	112	
Large	11-30P	14	3	1	32	3	0	3	1	0	1	0	58	99
	31-50P	6	1	2	9	1	0	1	1	0	0	2	23	
	>50 P	3	0	0	8	0	0	1	1	1	0	4	18	
	Total	255	39	19	481	124	49	23	28	6	39	73		

Men

Respondents expertise as architect by firm size.

		Planning	Landscape architecture	Urban design	Architecture	Interior design	Structural design	Academia	Researcher	Curator	3D modelling	Other	Total	
Small	1P	157	41	9	328	55	67	17	11	3	37	57	782	1234
	2P	105	12	3	229	34	24	8	3	1	13	20	452	
Medium	3-5P	177	19	8	320	73	62	20	11	3	37	40	770	1245
	6-10P	120	15	3	197	37	44	11	5	1	20	22	475	
Large	11-30P	89	14	3	143	30	34	13	5	1	10	18	360	601
	31-50P	25	3	0	55	14	7	3	0	0	4	4	115	
	>50 P	29	1	0	43	14	15	6	2	0	14	2	126	
	Total	702	105	26	1315	257	253	78	37	9	135	163		

Table color: Responses + -

Figure 4.16: All countries, expertise of female/male respondent as architect by firm size.

4.3. Respondents' profile as office, practice or firm

Each survey respondent has individual characteristics, both as a person and as a professional, which have already been described. However, there are also factors related to the economic structure on whose behalf they are completing the survey—whether it be an office, firm, company, or cooperative. In Europe, a significant proportion of architectural offices operate as sole proprietorships, accounting for 62.20% of cases. When including firms with 2 to 5 people, this figure rises to 92% of all registered architectural offices. This **prevalence of small-scale practices** makes it particularly challenging to separate individual working conditions from those of the business itself.

In this section, key characteristics of these structures will be examined, including the number of people working in them, the respondent's status within the firm, primary market focus, average office profit, and the number of years the company has been in operation.

Most of the responses come from small practices, both when analysing all countries collectively and when examining each country individually. This reflects the predominance of small-scale architectural firms across the surveyed regions.

This might suggest that the survey is biased toward the perspectives of small offices—and that is likely the case. However, when comparing the number of responses from each office size category with the actual distribution of architectural firms in each country, it becomes clear that medium and large offices are proportionally better represented in the survey responses. This is clear for the four countries with more responses.

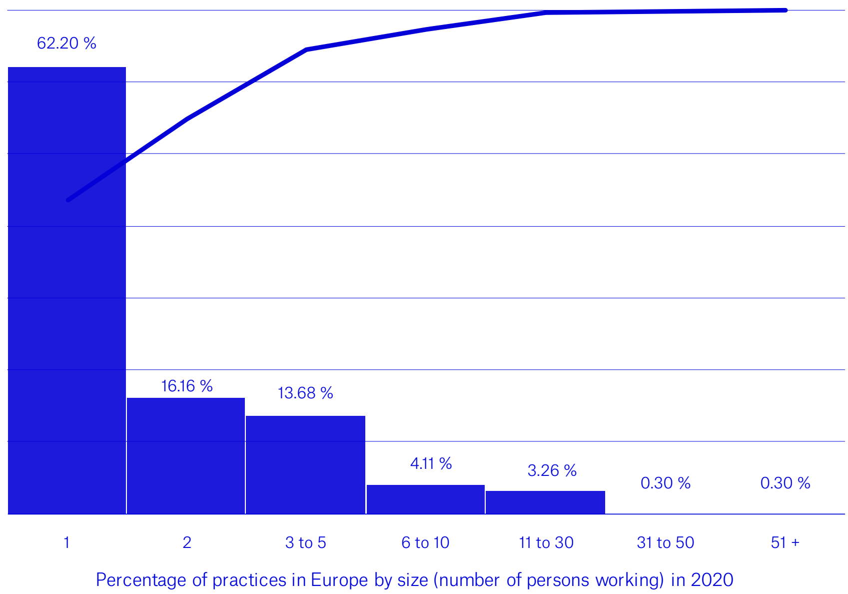
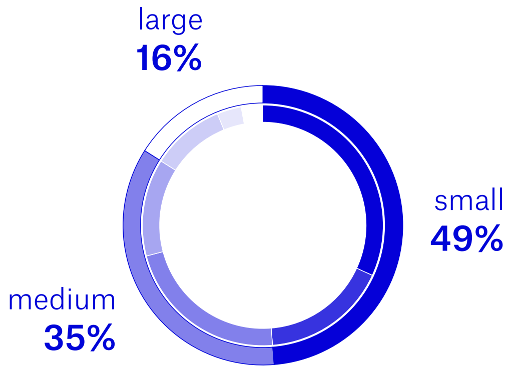


Figure 4.17: The 2022 ACE Sector Study provides insights into the distribution of architectural offices by size across the EU.

Responses by firm size



Small	1 Person	409	**626**
	2 People	217	
Medium	3-5 People	285	**453**
	6-10 People	168	
Large	11-30 People	127	**206**
	31-50 People	42	
	More than 50 People	37	
	Not specified	5	
	Total respondents	1285	

Figure 4.18: All countries: Respondents' size of practices.

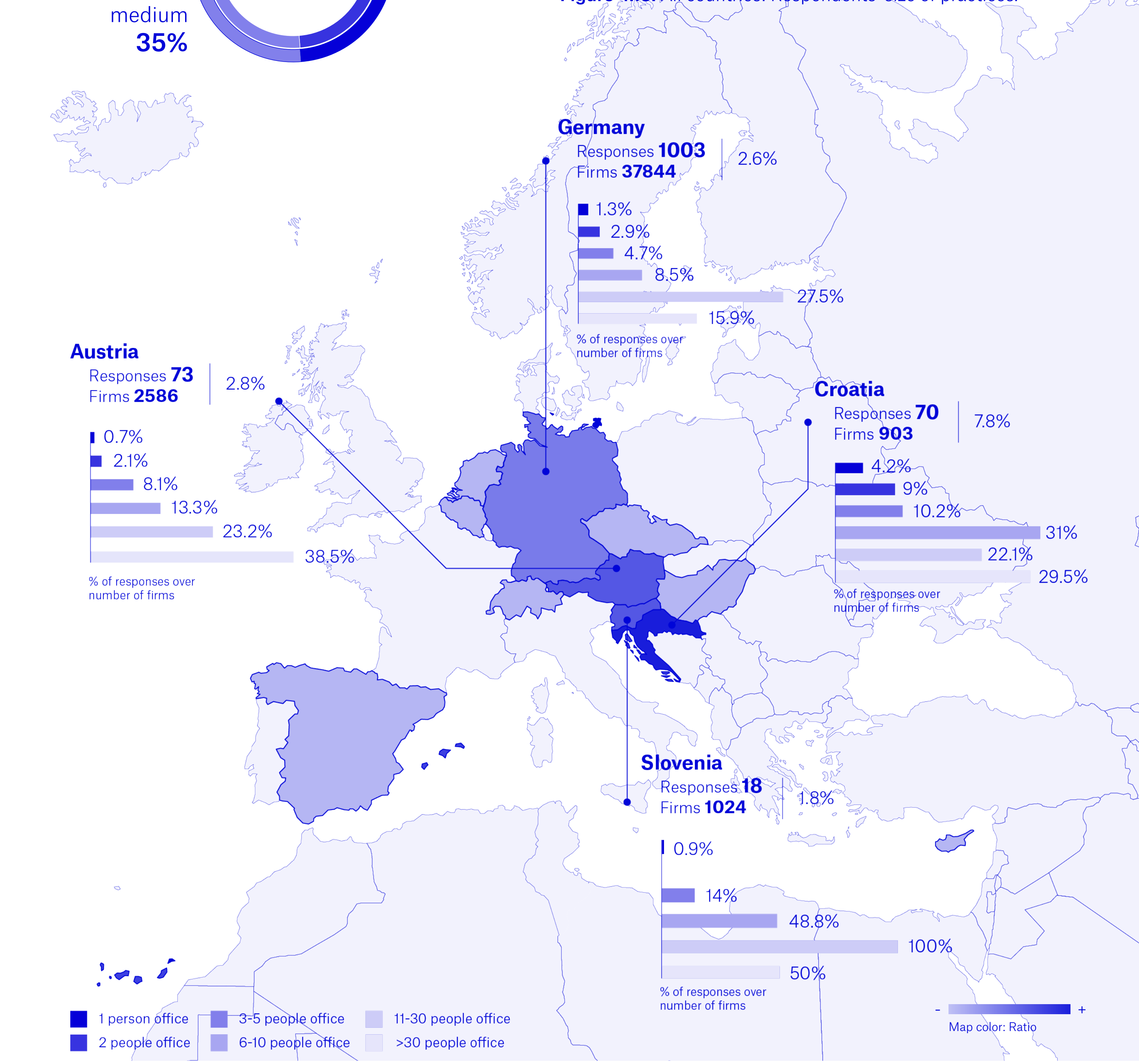


Figure 4.19: Percentage of response over available number of firms in Austria, Croatia, Germany and Slovenia.

The graphs above, which combine data from the ARCH-E ADC Map on the percentage of offices by size for some partner countries with survey responses filtered by country, reveal a notable trend: larger offices (those with more than 11 people) responses, in proportion to their real number in each country, show a higher level of engagement in responding to a survey focused on architectural competitions.

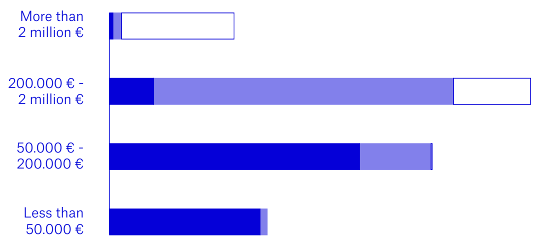
On the other hand, since most responses, in number or value (not percentage), come from individuals working in offices with one or two people, most respondents indicate that they are **owners or co-owners** of these firms. This finding is consistent with the overall structure of the architectural profession in Europe, where small practices dominate. The strong presence of firm owners among respondents suggests that the perspectives gathered primarily reflect those of decision-makers, providing insights into the challenges and opportunities faced by small architectural offices in transnational design competitions, even though they are not proportionally represented.

When analysing the turnover of architectural practices or firms, a total of 455 respondents globally reported that their firms generate between 200.000 and 2 million euros in annual revenue. However, when breaking this data down by sex at birth, noticeable disparities emerge. Women architects tend to be associated with smaller firms that report lower turnover compared to their male counterparts.

	Small		Medium		Large				
	1P	2P	3-5P	6-10P	11-30P	31-50P	>50P		Total
Less than 50.000 €	95	13	3	2	0	0	0	113	113
50.000 € - 100.000 €	51	24	9	1	0	0	0	85	140
100.000 € - 200.000 €	13	15	24	2	0	0	1	55	
200.000 € - 800.000 €	1	4	31	18	1	1	0	56	82
800.000 € - 2 million €	1	0	2	10	12	1	0	26	
2 - 4 million €	0	0	0	0	5	2	0	7	14
4 - 10 million €	0	0	0	0	0	1	2	3	
More than 10 million €	0	0	0	0	0	0	4	4	
Not specified	2	1	3	2	3	1	0	12	
Total	163	57	72	35	21	6	7	361	
		217		102			30		

Figure 4.20: Survey female respondents' turnover by size of firm.

	Small		Medium		Large				
	1P	2P	3-5P	6-10P	11-30P	31-50P	>50P		Total
Less than 50.000 €	98	29	6	0	0	0	0	133	133
50.000 € - 100.000 €	73	39	12	0	0	0	0	124	272
100.000 € - 200.000 €	49	50	45	3	1	0	0	148	
200.000 € - 800.000 €	5	28	125	82	5	0	1	56	355
800.000 € - 2 million €	2	2	8	38	56	1	2	26	
2 - 4 million €	1	1	3	1	31	16	1	7	105
4 - 10 million €	0	1	1	0	5	16	13	3	
More than 10 million €	0	0	2	0	0	2	11	4	
Not specified	5	1	2	2	2	1	1	14	
Total	233	151	204	126	100	36	29	879	
		378		326			161		



Max. >15 <15 <10

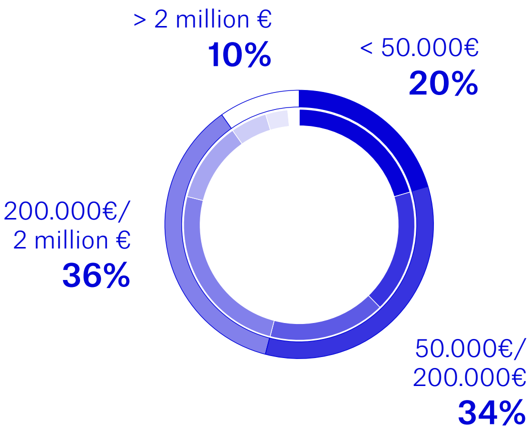
Table color: Responses

Small (1-2P) Medium (3-10P) Large (11-More than 50P)

Graphic color: Size of firm

Figure 4.21: Survey male respondents' turnover by size of firm.

Turnover distribution



All resp.

50.000 €	Less than 50.000 €	257	**257**
50.000 / 200.000 €	50.000 € - 100.000 €	217	**423**
	100.000 € - 200.000 €	206	
200.000 / 2 million €	200.000 € - 800.000 €	313	**455**
	800.000 € - 2 million €	142	
2 million € or more	2 - 4 million €	64	**123**
	4 - 10 million €	39	
	More than 10 million €	20	
	Not specified	32	
	Total respondents	1290	

Figure 4.22: All countries: Respondents' offices turnover.

Women

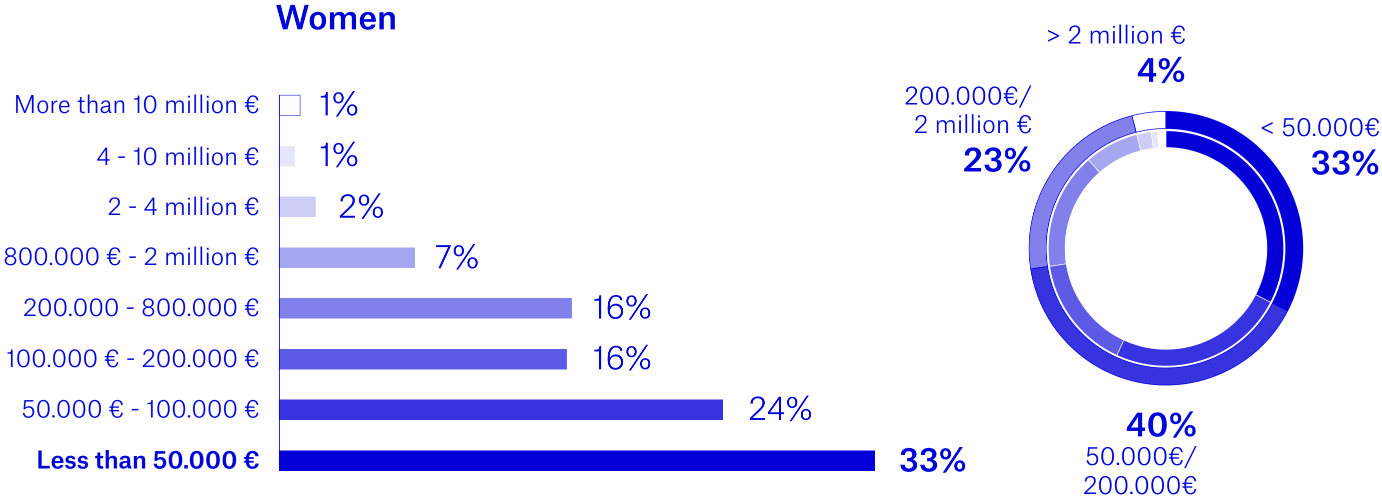


Figure 4.23: All countries: Female percentage of turnover distribution.

Men

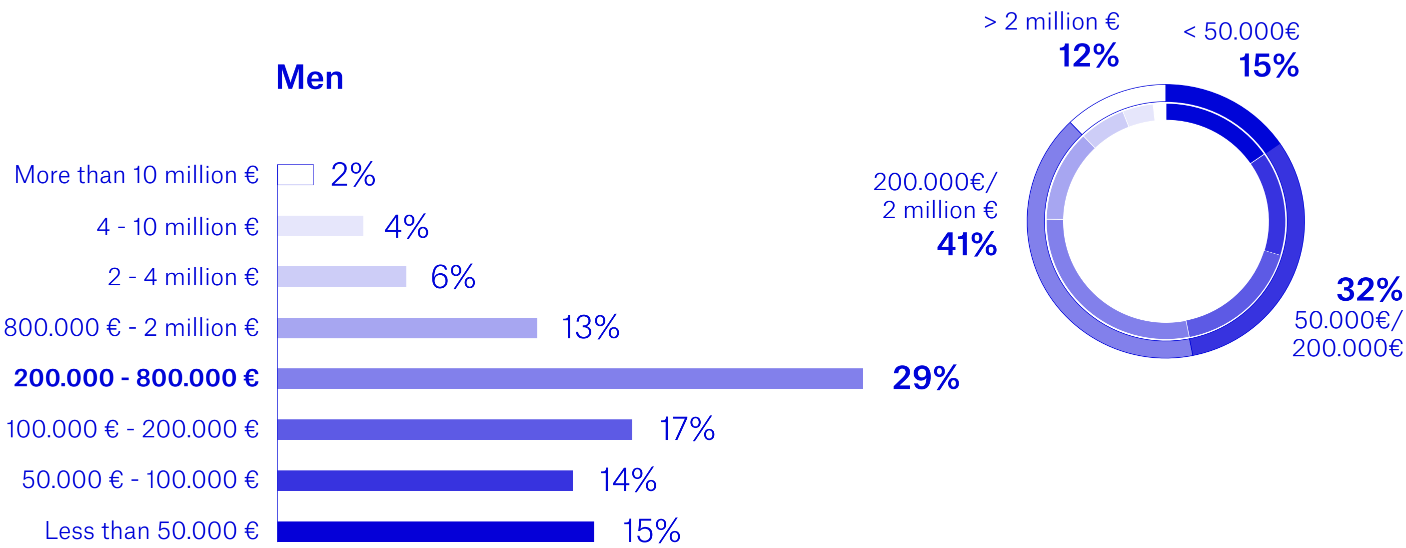


Figure 4.24: All countries: Male percentage of turnover distribution.

4.4. Average survey respondents' profile

Although the survey data has been thoroughly analysed in detail, it is possible to outline the typical profile of a respondent:

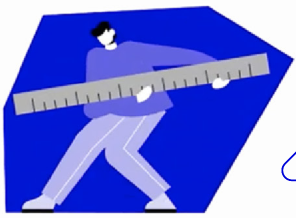
- The average participant in this survey is likely to be an experienced (men) professional, often over 50 years old, holding a degree or equivalent qualification, and occupying a leadership role within their firm—most commonly as an owner or co-owner.

- In terms of professional engagement, the typical respondent works 40 to 50 hours per week and earns an annual gross salary between 30.000 and 60.000 euros. Additionally, most respondents operate within small architectural practices, which reflects the dominant structure of the profession across Europe, where a significant portion of firms are composed of fewer than five people.

However, when filtering the data by sex at birth, a significant difference emerges in **firm's annual turnover.** While most aspects of professional profiles remain similar, the average turnover for firms led by **women architects** responding to this survey is **less than 50.000 €**, whereas for their male counterparts, it falls within the range of **200.000 to 800.000 €**.

Men

Turnover: Firm annual turnover is generally **between 200.000 € and 800.000 €**

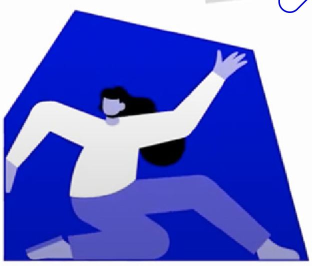


Profile of the Average **Women/Men** Respondant

- **Size of Practice:** Typically works as **a solo practitioner or in a small firm**
- **Position:** Most commonly, they are the **owner or co-owner** of their business, company, or office
- **Years of Operation:** Their practice has been in operation for **21 years or more**
- **Expertise:** Specialised in **architecture**/bulding construction and planning
- **Registered Architect:** Yes, registration is compulsory in their country of practice
- **Experience:** Over 21 years of professional experience in architecture
- **Hours Worked:** Works an average of **40-50 hours per week**
- **Country of Residence:** Resides in **Germany**
- **Nationality:** German
- **Age:** Falls within the **51-60 age** range
- **Academic Level:** Holds a degree or similar academic qualification in architecture

Women

Turnover: Firm annual turnover is generally **less than 50.000 €**



5
Surveyed Content

Surveyed Content

Once the **reference framework** for the survey and its respondents has been established, it is essential to define the **criteria for analysing and evaluating the collected content.**

The survey was designed to explore the four **core research questions** of the **ARCH-E project according to the selected key topics**, which were translated into **ten sets of questions** (67 questions in total). These questions were refined through **discussions with project partners and the ACE Sector Studio team**, ultimately resulting in a set of inquiries that addressed:

- Architects' interest in transnational ADCs.
- Knowledge, skill gaps and barriers when taking part in transnational ADCs.
- Existing international connections among architects.
- Needed support form Chambers of Architects and from this project.
- The **possibility of private clients** organizing ADCs.
- Issues related to the **previous YesWePlan! project** [9], which focused on promoting women in architecture and civil engineering.

It is worth noting the varying levels of survey participation across different countries. The low response rate itself is a significant data point to analyse, particularly in countries such as Switzerland, the Netherlands, and Spain, where the survey was actively promoted yet received minimal interest from architects. This may suggest differences in the integration of Architects' Chambers within the profession, as well as variations in architects' daily priorities and engagement with such initiatives in each country.

5.1. Criteria for data analysis

Once the survey was completed, the data analysis followed a structured approach, considering different levels of segmentation:

1. **General review** – Analysing responses to each question without distinction by country (**ALL COUNTRIES** keyword).
2. **Country-specific review** – Examining responses from countries with a significant number of participants in proportion to the number of registered architects in each country, specifically **Croatia, Slovenia, Austria, and Germany.**

[9] Eva M. Álvarez Isidro et al., COMPENDIUM 4 IN 1. YesWePlan! Promoting Women in Architecture and Civil Engineering (Vienna: YesWePlan! project team, 2022), https://yesweplan.eu/wp-content/uploads/2022/04/YES_WE_PLAN_COMPENDIUM_4_IN_1_INLAY_WEB.pdf.

3. **Analysis by firm size** – Reviewing responses based on the size of the architectural office or practice.

4. **Gender-based analysis** – Evaluating responses based on the gender of the respondent.

5. **Cross-analysis** – Comparing responses based on a **combination of the criteria above** to identify potential correlations.

The **content analysis** aims to provide a **broad and global perspective**, gradually refining the focus to **more specific details**, depending on the nature of each question and the **availability of data**.

Survey Alignment with ACE Guidelines

It is also important to note that this survey was aligned with the **procedures of the ACE biennial survey** [10], ensuring consistency in methodology. Therefore, no questions were made **mandatory**, except for **the country of residence (Question 10.1)**. As a result, a **significant number of questions were left unanswered** by architects responding the survey, which is a **valuable data point** for analysis.

5.2. Architects interest in transnational ADCs: On practice interests

From the start, the **ARCH-E project aimed to understand the interest of architects in Europe in participating in architectural design competitions outside their country of residence**. It sought to identify the main reasons why some architects choose to take part in these competitions and what factors might encourage those who do not regularly engage in such activities. To explore these aspects in depth, the survey included two sets of questions designed to gather insights into both the interests for participating and the motivations that may support architects for doing so.

Question Set 03: Focused on the **practice's interest in participating in Architectural Design Competitions (ADCs) outside its home country.** The questions were directed at architectural practices, offices, or cooperatives. If the respondent was part of a one-person practice, they answered based on their own experience. If the practice involved multiple people, the respondent provided answers on behalf of the practice.

This set of question included 13 questions varying in content and length. The most significant results from the questions in this set are analysed in the following paragraphs and pages.

[10] Mirza and Nacey, "The Architectural Profession in Europe. 2022 Sector Study."

Q 3.1

Has your practice ever taken part in an ADC IN your home country?

- This question was answered by most survey participants, with **69% having participated** (870 responses) in national ADCs and **31% having not participated in them** (397)
- When compared data of **survey respondents participating in national ADCs related to registered architects segmented by country, data clearly highlights Croatia (1.22%), followed by Austria (1.12%) and Slovenia (0.87%).** Mid-range performers include Germany (0.55%), Hungary (0.25%), Czech Republic, Cyprus and Spain (0.10%), and in the lower end The Netherlands (0.01%).
- This question has been segmented by sex at birth showing that the **56% of women** responding this survey has taken part in ADCs in the country where they reside (home country) compared to a **74% of positive responses coming from men.**
- When analysing responses of who is taking part in national ADCs by country of residence, a clear majority comes from **men living in Germany,** followed by **women living in Germany**, with a significant gap between them and respondents from other countries. However, when comparing the number of responses to this question relative to the total survey participation in each country, a different pattern emerges. In **Austria**, both **men and women** respondents show a **high participation rate** (over **90%**) in national ADCs. In contrast, in **Croatia**, only around **60%** of respondents have taken part in national ADCs.

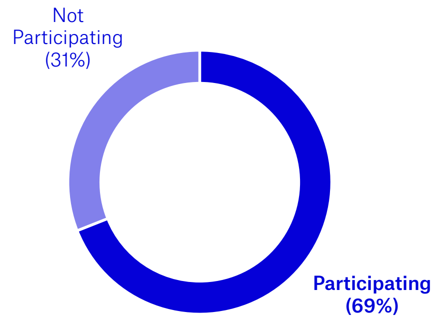


Figure 5.1: Q 3.1 All countries: Respondents taken part in an ADC in home country (percentage).

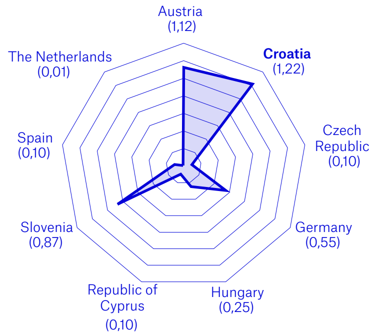


Figure 5.2: Q 3.1 Respondents participating in **national ADC** by countries.

Q 3.2

On a scale of 1 to 5, please indicate how important it is for your practice, at the present time, to be able to participate in an Architectural Design Competition (ADC) IN your home country. (1 being Not relevant/ 5 being Very Relevant)

The responses to this question are divided with **a clear score to 1 Not Relevant** though the following one is 5, Very Relevant. It is needed to remind that most responses come from small practices. In comments, some respondents have said that,

> *[Germany, woman, 51-60 years old, firm size of 3-5 people]: "We work very regionally and are therefore very busy. That's why we don't take part in any competitions. This is where we can best utilise our knowledge. Short travelling times improve the compatibility of family and career."*
> *[Germany, woman, 51-60 years old, firm size of 1 person]: "As a lone fighter, I don't have time for competitions."*
>
> *[Germany, man, 51-60 years old, firm size of 2 people]: "Only if the competition is paid fairly. That is not the case. The fee is distributed to several people.*

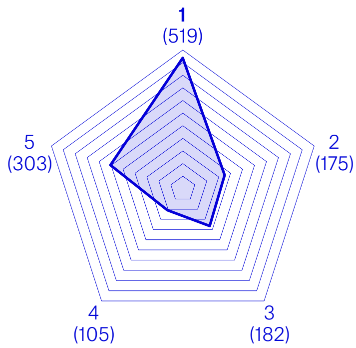
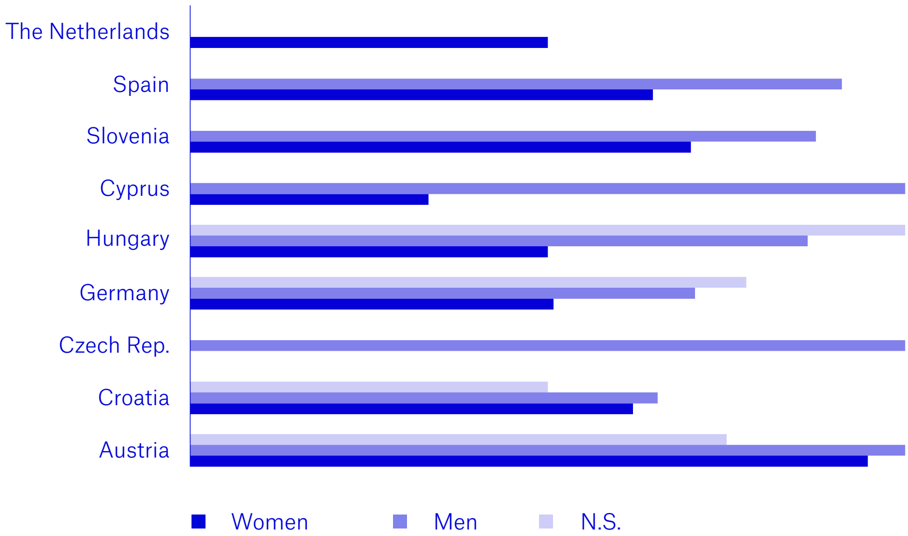
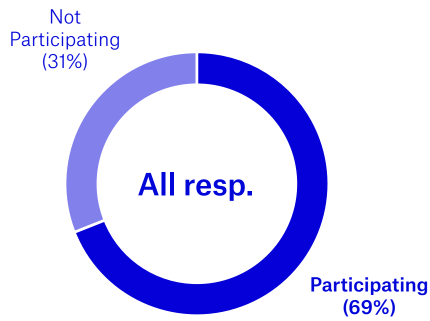


Figure 5.3: Q 3.2 Value given by respondents to participate in **national** ADCs.

Q 3.1 Respondents participating in national ADCs





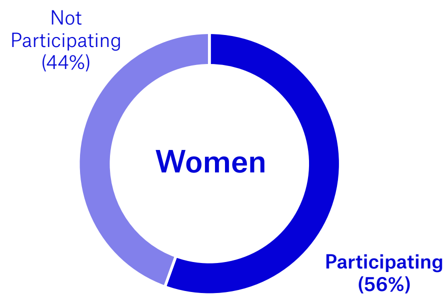
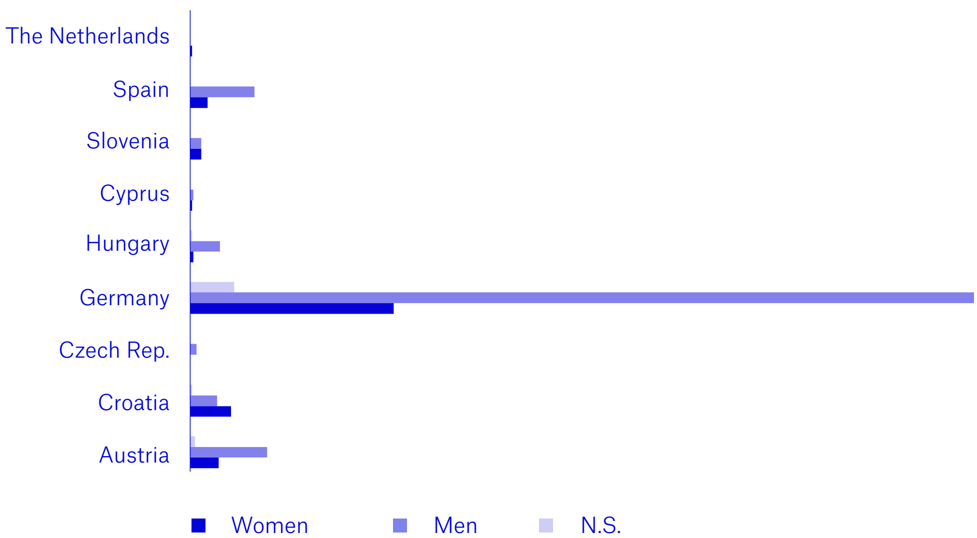


Figure 5.4: Q 3.1 Respondents participating in **national ADC** by countries.
% Of participants in NADC related to the number of responses by country.



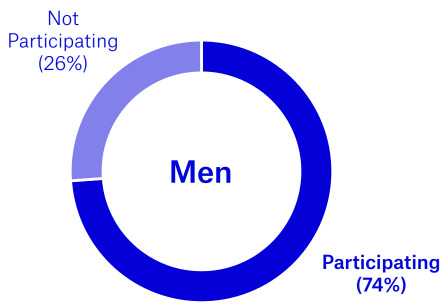


Figure 5.5: Q 3.1 Respondents participating in **national ADC** by countries (values).

Country of residence	Total responses	Women's responses	Women resp. Participating in NADC	% Women resp. in NADC	Men's responses	Men resp. Participating in NADC	% Men resp. in NADC	NS' responses	NS participating in NADC	% NS resp.in NADC	Total participating in NADC	% resp. participating in NADCS
Austria	73	19	18	94.74	49	49	100.00	4	3	75.00	70	95.89
Croatia	70	42	26	61.90	26	17	65.38	2	1	50.00	44	62.86
Czech Rep.	4	0	0	0.00	4	4	100.00	0	0	0.00	4	100.00
Germany	1003	256	130	50.78	711	502	70.60	36	28	77.78	660	65.80
Hungary	27	4	2	50.00	22	19	86.36	1	1	100.00	22	81.48
Cyprus	5	3	1	33.33	2	2	100.00	0	0	0.00	3	60.00
Slovenia	18	10	7	70.00	8	7	87.50	0	0	0.00	14	77.78
Spain	64	17	11	64.71	45	41	91.11	0	0	0.00	52	81.25
The Netherlands	3	2	1	50.00	1	0	0.00	0	0	0.00	1	33.33
Total	1267	353	196	55.52	868	641	73.85	43	33	76.74	870	68.67

Figure 5.6: Q 3.1 Respondents participating in **national ADCs** by countries.

Q 3.3

Has your practice ever taken part in an international ADC OUTSIDE your home country?

- This question was answered by most survey participants, with **24% having participated** (321 responses) in international ADCs and **76% having not participated** in them (964).
- When compared data of **survey respondents participating in international ADCs related to registered architects segmented by country, data clearly highlights more engagement from architects from Austria (0.66%), followed by architects from Croatia (0.44%) and Slovenia (0.37%)**. Mid-range engagement include Germany (0.16%), Hungary (0.12%), Czech Republic and Spain (0.07%), and in the lower end countries such as Cyprus (0.06%) and The Netherlands (0.02%).
- This question was also segmented by **sex at birth**, revealing that only **18% of women** participating in the survey have taken part in ADCs outside their **home country**, compared to **27% of men.**
- When analysing responses of who is taking part in transnational ADCs by country of residence, again appears a clear dominance from **men living in Germany**, followed by **women living in Germany**, with a significant gap between them and respondents from other countries. However, when comparing the number of responses to this question relative to the total survey participation in each country with a consistent set of responses, a different pattern emerges. In **Austria**, both **men and women** respondents show an **acceptable participation rate** (over **60% in women** and around **50% in men**) in ADCs outside home country. In contrast, in **Croatia**, only around **20%** of women and 26% of men respondents have taken part in transnational ADCs.

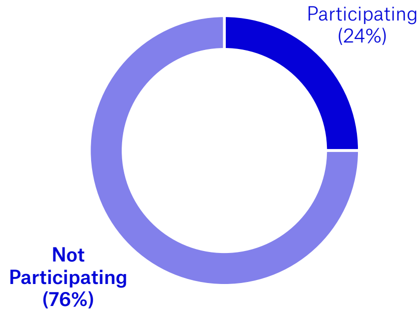


Figure 5.7: Q 3.3 All countries: Respondents taken part in an ADC outside home country (percentage).

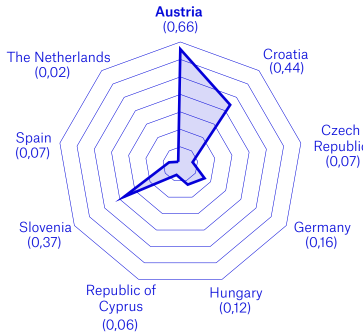
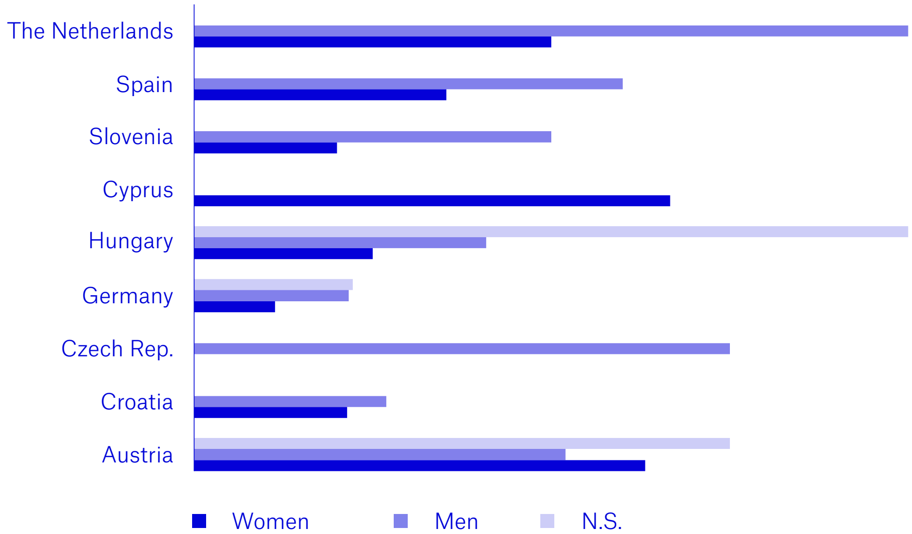


Figure 5.8: Q 3.3 Respondents participating in **international ADC** by countries.

Q 3.3 Respondents participating in international ADCs



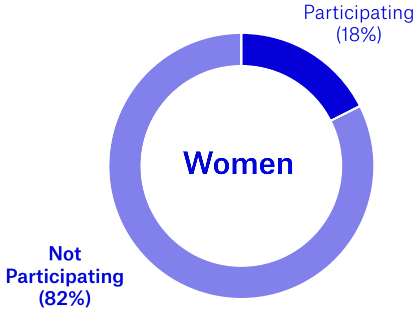
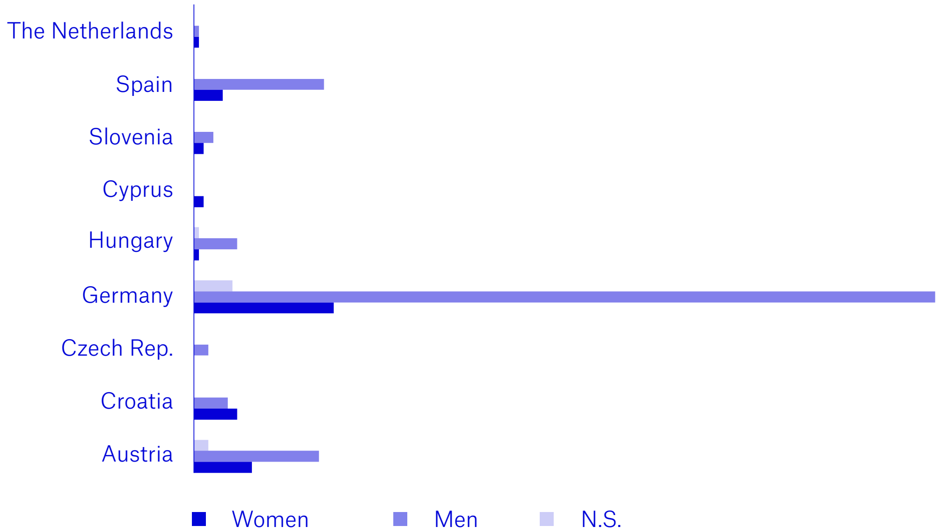


Figure 5.9: Q 3.3 Respondents participating in **international ADCs** by countries. % Of participants in IADC related to the number of responses by country.



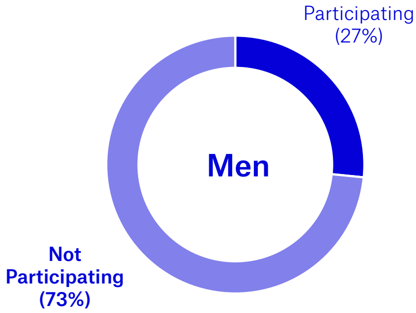


Figure 5.10: Q 3.3 Respondents participating in **international ADCs** by countries (values).

Country of residence	Total responses	Women's responses	Women participating in IADC	% Women resp. in IADC	Men's responses	Men participating in IADC	% Men resp. in IADC	NS' responses	NS participating in IADC	% NS resp. in IADC	Total participating in IADC	% Respondents participating in IADCS
Austria	73	19	12	63.16	50	26	52.00	4	3	75.00	41	56.16
Croatia	70	42	9	21.43	26	7	26.92	2	0	0.00	16	22.86
Czech Rep.	4	0	0	0.00	4	3	75.00	0	0	0.00	3	75.00
Germany	1003	256	29	11.33	711	154	21.66	36	8	22.22	191	19.04
Hungary	27	4	1	25.00	22	9	40.91	1	1	100.00	11	40.74
Cyprus	5	3	2	66.67	2	0	0.00	0	0	0.00	2	40.00
Slovenia	18	10	2	20.00	8	4	50.00	0	0	0.00	6	33.33
Spain	64	17	6	35.29	45	27	60.00	0	0	0.00	33	51.56
The Netherlands	3	2	1	50.00	1	1	100.00	0	0	0.00	2	66.67
Total	1267	353	62	17.56	869	231	26.58	43	12	27.91	305	24.07

Figure 5.11: Q 3.3 Respondents participating in **international ADCSs** by countries.

Q 3.4

On a scale of 1 to 5, please indicate how important it is for your practice, at the present time, to be able to participate in an Architectural Design Competition (ADC) OUTSIDE your home country. (1 being Not relevant/ 5 being Very Relevant)

The responses to this question massively point to **1 Not Relevant**, very distanced from the rest of the responses that also score to 2 and 3 (low importance). It is needed to remind that most responses come from small practices. In comments, some respondents have said that,

> *[Germany, man, 51-60 years old, firm size of 3-5 people]: "Participation of the office in competitions is almost impossible, as 95% of our small office structure, despite 35 years of professional experience and 20 years of existence of the office, cannot provide the necessary references to be admitted to participation at all or to get into a lottery pot. This is extremely annoying for us and has led to the fact that we can NO longer take part in competitions or only in co-operation with larger offices that can provide the relevant references."*

> *[Germany, man, 51-60 years old, firm size of 2 people]: "I don't want to go to the expense of building abroad. In this respect, there is no interest in international competitions or planning contracts."*

> *[Germany, man, 51-60 years old, firm size of 6-10 people]: "No one takes part in competitions at home or abroad because the admission requirements are too high / / only uninteresting free idea competitions or realisation competitions with requirements that cannot be met in terms of "building or task must already have been built 3 times, turnover, number of employees etc." are advertised / there is no point in trying to take part because there is no chance of success".*

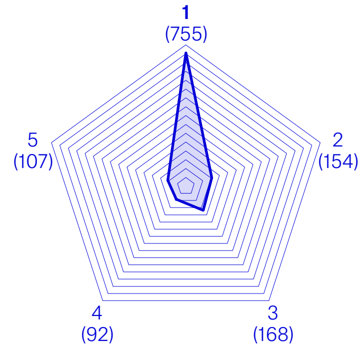


Figure 5.12: Q 3.4 Value given by respondents to participate in **international** ADCs.

Cross-analysis of Q 3.1 and Q 3.3:

Examining respondents who have participated in national ADCs and have also taken part in international ADCs

In this search, all data was first filtered based on **positive responses to Q 3.1**. From this subset, an additional filter was applied to include only those who **also responded positively to Q 3.2**, allowing for a focused analysis of this specific group.

1. This question was answered by most survey participants, with **23% having participated** (286 responses) in international ADCs and also in national ADCs and **77% having not participated** in them (981).

2. When compared data of **survey respondents participating in international ADCs and also in national ADCs related to registered architects segmented by country, data clearly highlights Austria (0.63%), followed by Croatia (0.44%) and Slovenia (0.37%).** Mid-range performers include Germany (0.15%), Hungary (0.12%), Czech Republic (0.07%), and in the lower end countries such as Spain (0.06%), Cyprus (0.03%) and The Netherlands (0.01%).

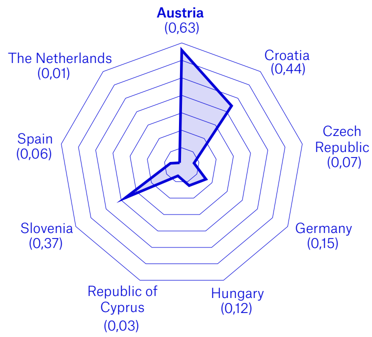


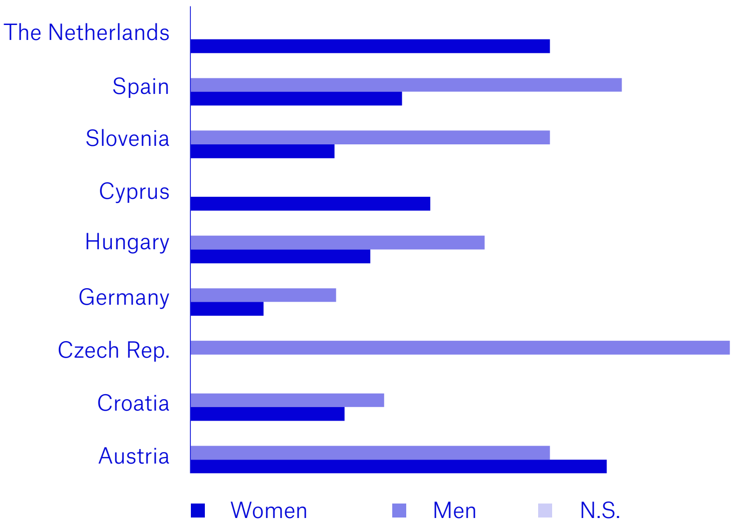
Figure 5.13: Q 3.1/Q3.3 Respondents that having participated **in national ADCSs also** participate **in international ADCs**.

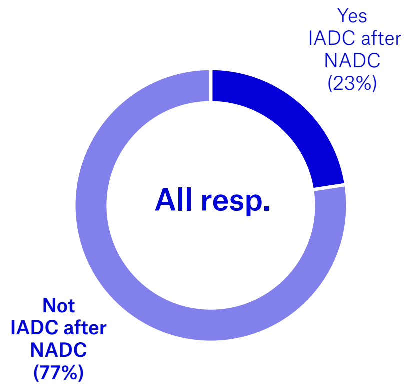
3. The respondents who fulfilled this specific target when segmented by **sex at birth** showed that **16% of women** who have taken part in a national ADC had also taken part in a transnational ADC and **25% of men** who have taken part in a national ADC had also taken part in a transnational ADC. Nearly all respondents taking part in transnational ADCs have taken part in national ADCs.

4. Respondents who have participated in transnational ADCs (18% of women and 27% of men) and have also taken part in national ADCs (16% of women and 25% of men)) sum up 286 people (23% of survey respondents). However, these figures remain significantly lower than the overall participation rates in national ADCs (69% of total respondents), where 56% of women and 74% of men respondents reported taking part. This discrepancy highlights specific barriers that may hinder architects—particularly women—from engaging in international ADCs, despite their involvement in national competitions.

5. When analysing responses of who is taking part in both national and international ADCs (23% of survey respondents) by country of residence, there is a clear dominance of men living in Germany, followed, surprisingly, by men in Spain, and then by women in Germany and men living in Austria with a significant gap between them and respondents from other countries. However, when comparing responses to this cross-question relative to the total survey participation per country, a different pattern emerges. In Austria, both men and women show a relatively high engagement rate, with over 58% of women and around 50% of men who responded to the survey having participated in both national and international ADCs. This is followed by men in Slovenia, where 50% of respondents have taken part in both types of competitions. In contrast, despite Germany having many survey respondents, only 10% of women and 20% of men responding reported participation in both national and transnational ADCs. In Croatia, the figures are slightly higher, with 21% of women and 26% of men meeting this criterion.

Respondents that having participated in national ADCs also participate in international ADCs





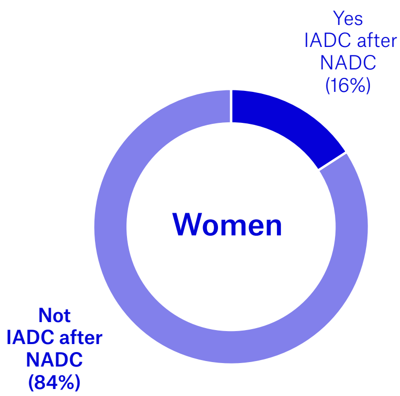
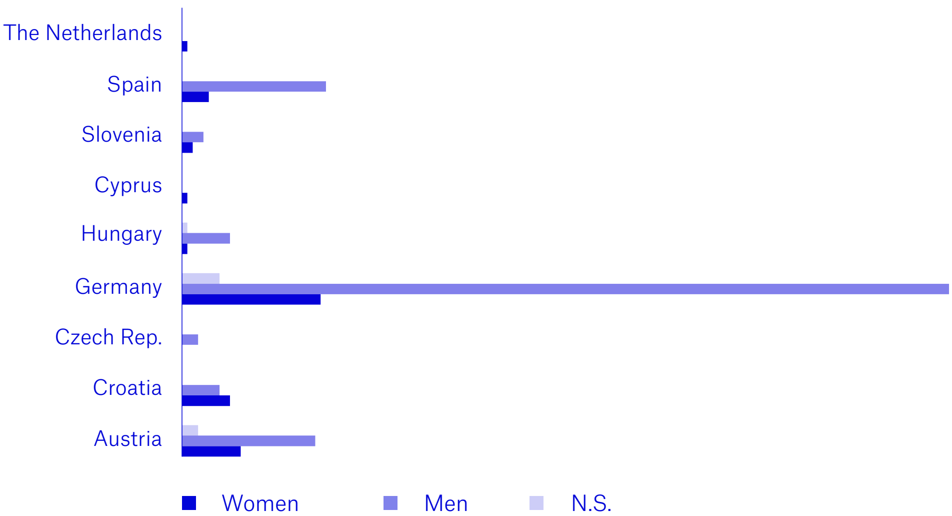


Figure 5.14: Respondents participating first in **national ADCs and of those in international ADCs** by country. % of participants in NADC and then in IADC related to the number of responses.



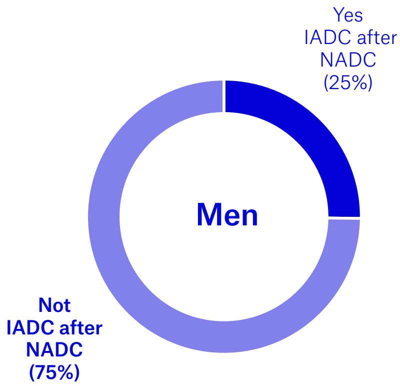


Figure 5.15: Respondents participating first in **national ADCs and of those in international ADCs** by country (value).

Country of residence	Total responses	Women's responses	Women participating in NADC	Of these women >> women participating in IADC	% Women resp. in IADC after NADCs	Men's responses	Men participating in NADC	Of these men >> men participating in IADC	% men resp. in IADC after NADCS	NS' responses	NS participating in NADC	Of these NS>>NS participating in IADC	% NS resp. in IADC after NADCS	Total participating in IADC after NADC	% respondents participation in IADCS after NADC
Austria	73	19	18	11	57.89	50	49	25	50.00	4	3	3	75.00	39	53.42
Croatia	70	42	26	9	21.43	26	17	7	26.92	2	1	0	0.00	16	22.86
Czech Rep.	4	0	0	0	0.00	4	4	3	75.00	0	0	0	0.00	3	75.00
Germany	1003	256	130	26	10.16	711	502	144	20.25	36	28	7	19.44	177	17.65
Hungary	27	4	2	1	25.00	22	19	9	40.91	1	1	1	100.00	11	40.74
Cyprus	5	3	1	1	33.33	2	2	0	0.00	0	0	0	0.00	1	20.00
Slovenia	18	10	7	2	20.00	8	7	4	50.00	0	0	0	0.00	6	33.33
Spain	64	17	11	5	29.41	45	41	27	60.00	0	0	0	0.00	32	50.00
The Netherlands	3	2	1	1	50.00	1	0	0	0.00	0	0	0	0.00	1	33.33
Total	1267	353	196	56	15.86	869	641	219	25.20	43	33	11	25.58	286	22.57

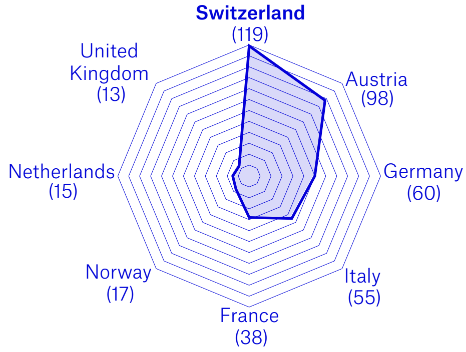
Figure 5.16: Respondents that having participated **in national ADCSs also** participate **in international ADCs** by countries.

Q 3.5

If your response to Q 3.3 was positive, please write the name of the country/countries, in which you participated in an ADC, in English in the field below.

This open-ended question was designed to allow respondents to list multiple countries where they had competed. A total of 661 responses were collected from across the globe. However, only countries mentioned more than once were considered, accounting for 645 responses and a total of 51 countries.

Among the 51 countries mentioned more than once, four stand out: **Switzerland** (cited 119 times, representing 18.4% of responses with multiple mentions), **Austria** (98 times, 15.2%), **Germany** (60 times, 9.3%), **Italy** (55 times, 8.5%), and **France** (38 times, 5.9%). Notably, German-speaking countries with well-structured organizational systems dominate the list. Interestingly, Italy stands out as the highest-ranked non-German-speaking country, possibly influenced by its proximity to German-speaking neighbours.



Country	Times cited	%
Austria	98	15.2
Belgium	13	2.0
Bosnia and Herzegovina	2	0.3
Brazil	3	0.5
Bulgaria	2	0.3
Canada	3	0.5
Czech Republic	5	0.8
China	11	1.7
Croatia	5	0.8
Denmark	12	1.9
Dubai	2	0.3
Ecuador	2	0.3
Egypt	2	0.3
Estonia	2	0.3
Finland	16	2.5
France	38	5.9
Germany	60	9.3
Greece	4	0.6
Hungary	2	0.3
Iceland	2	0.3
India	2	0.3
Ireland	7	1.1
Italy	55	8.5
Japan	8	1.2
Lebanon	2	0.3
Liechtenstein	5	0.8
Lithuania	3	0.5
Luxembourg	15	2.3
Macedonia	2	0.3
Mongolia	2	0.3
Montenegro	2	0.3
Mexico	3	0.5
Netherlands	15	2.3
Norway	17	2.6
Poland	12	1.9
Portugal	7	1.1
Qatar	2	0.3
Romania	7	1.1
Russia	3	0.5
Saudi Arabia	3	0.5
Serbia	5	0.8
Slovakia	4	0.6
Slovenia	9	1.4
South Korea	2	0.3
Spain	19	2.9
Sweden	6	0.9
Switzerland	119	18.4
United Arab Emirates	4	0.6
Ukraine	3	0.5
United Kingdom	13	2.0
United States of America	5	0.8
	645	100.0

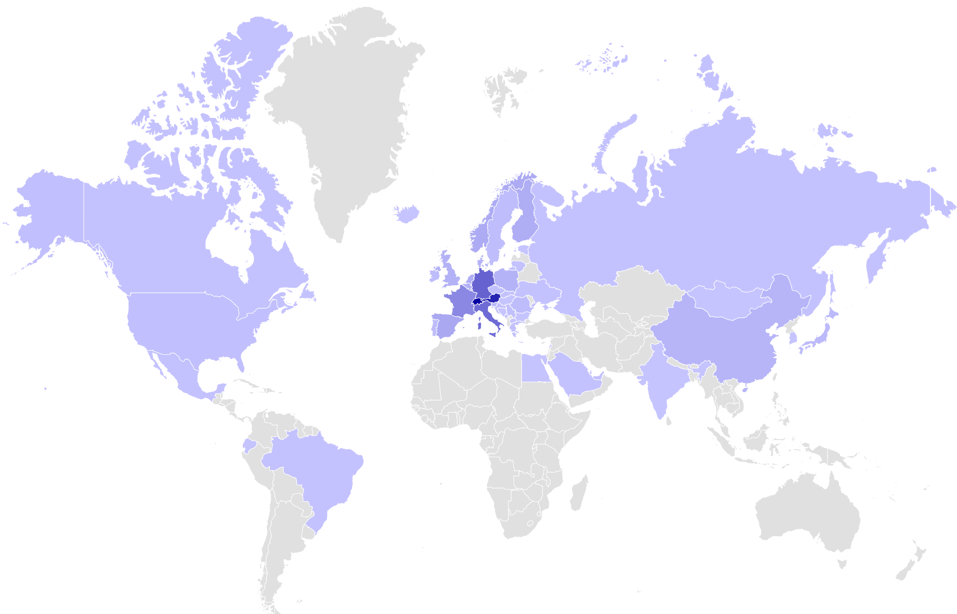


Figure 5.17: Q 3.5 All countries: Respondents who have participated in international ADCs - Map showing countries where they have presented a proposal for an ADC (value).

During the collective work sessions on survey results, there was significant **interest in understanding the flow of participants**, who had said they had participated in international ADCs, **in competitions across different countries.** As a result, the data from countries with consistent number of responses has been analysed in detail, segmented by respondents' country or residence, sex at birth, and office/firm/practice size.

a) According to **breakdown by country of residence** and sex at birth:

- Respondents residing in **Austria** who have participated in international ADCs show the highest interest in **Germany (37.9%)**, followed by **Switzerland (27.4%)** and Italy (10.5%). The preference for these countries is relatively consistent between men and women, though women score a bit more to Switzerland. Other countries of interest and exchange are Liechtenstein, Spain, Norway, Slovenia and France. No mention of Croatia, nor men or women.

Figure 5.18: Q 3.5 Austria: Countries where **female** respondents with residence in Austria have participated in IADC (value).

Figure 5.19: Q 3.5 Austria: Countries where **male** respondents with residence in Austria have participated in IADC (value).

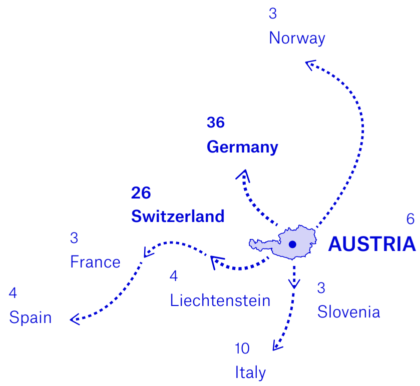


Figure 5.20: Q 3.5 Austria: Respondents with residence in Austria have taken part in IADC in...

- Respondents residing in **Germany** who have participated in international ADCs show the highest interest in **Switzerland (32%)**, followed by **Austria (31.3%)**, Italy (12.5%) and France (8.6%). Other countries of interest and exchange are The Netherlands (3.5%), Norway and Denmark (3.1% each one) and Spain (2.7%). In proportion, there is no great differences among women and men respondents.

Figure 5.21: Q 3.5 Germany: Countries where **female** respondents with residence in Germany have participated in IADC (value).

Figure 5.22: Q 3.5 Germany: Countries where **male** respondents with residence in Germany have participated in IADC (value).

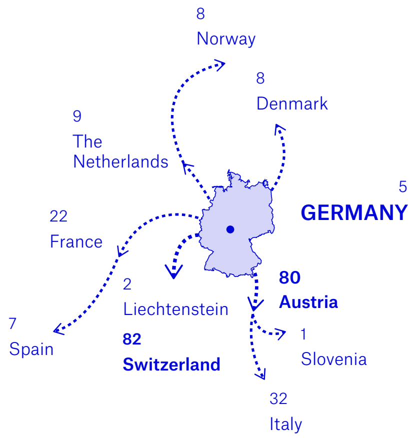


Figure 5.23: Q 3.5 Germany: Respondents with residence in Germany have taken part in IADC in...

- Respondents residing in **Croatia** who have participated in international ADCs show the highest interest in **Italy (20.6%)**, followed by **Slovenia (17.6%)**, Macedonia (11.8%) and Finland (11.8%). Other countries of interest and exchange are The Netherlands (5.9%), Norway (5.9%) and Spain (5.9%). Though differences are minimum, women respondents in Croatia prefer Italy followed by Slovenia and men respondents prefer Slovenia followed by Italy.

Figure 5.24: Q 3.5 Croatia: Countries where **female** respondents with residence in Croatia have participated in IADC (value).

Figure 5.25: Q 3.5 Croatia: Countries where **male** respondents with residence in Croatia have participated in IADC (value).

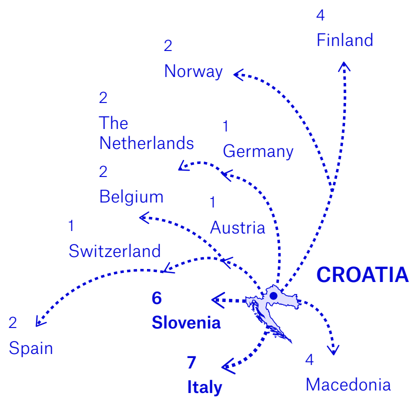


Figure 5.26: Q 3.5 Croatia: Respondents with residence in Croatia have taken part in IADC in...

b) The breakdown by firm/practice size provides limited insights. However, it is evident that the most engaged offices—those actively responding and discussing their participation—are firms with 3 to 5 members across all three countries, followed by solo practitioners.

c) Some comments highlight a preference for German-speaking countries, emphasizing cultural and linguistic familiarity as

> *[Germany, man, 31-40 years old, firm size of 11-30 people]: "There is no point in taking part in competitions where the language of the competition brief is not German"*

> *[Germany, man, 51-60 years old, firm size of more than 50 people]: "The competitions in Germany are generally well organised. You rarely get the impression that the award-winning work was not worthy of a prize."*

Q 3.7

If your answers to questions 3.2 and/or 3.4 indicate that participating in ADCs is not really important to you, what factors would MOTIVATE you to participate in ADCs outside your home country? (multiple answers are possible)

This question aims to determine what would motivate architects to participate in international ADCs. Overall, the option **"Getting additional income"** is the clear winner, but when analysing the results based on:

a) Among those **who have previously participated in a transnational ADC**, the most selected option related to motivations to take part again is **"Professional networking opportunities"** (78 responses), closely followed by **"Promotion and impact of Baukultur"** (75) and **"Getting additional income"** (74). The remaining options show varied results, with **"Showing architectural skills on an international platform"** (67) being the most consistently chosen.

b) Among those respondents **who have not taken part in a transnational ADC**, the most selected option related to motivations to take part for the first time is **"Getting additional income"** (388) followed by **"Professional networking opportunities"** (265 responses), closely followed by **"Higher chance to win ADC"** (212 responses). **"Promotion and impact of Baukultur"** (191) and **"Showing architectural skills on an international platform"** (156) being the consistently chosen although in less quantity.

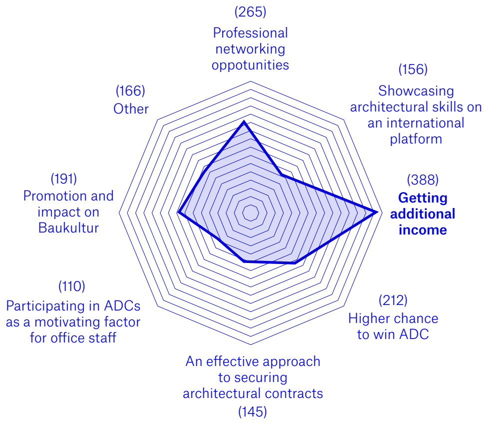


Figure 5.27: Q 3.7 Responses: Motivations among people who have **not** taken part in IADC (value).

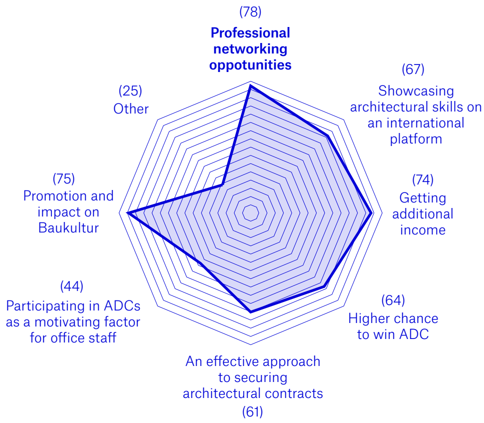


Figure 5.28: Q 3.7 Responses: Motivations among people who have taken part in IADC (value).

Q 3.8

In any case, are there any specific countries or regions that your practice find/ might find particularly appealing to take part in an international ADC?

Q 3.9

In case of affirmative response to question 3.8, which geographical area/s is/are MORE appealing for your practice?

Globally, **"Other EU country"** is the most preferred option among survey respondents, with **59%** selecting it, followed by **"Other European, non-EU country"** at **19.6%**. Other regions of the world receive only minor percentages of responses.

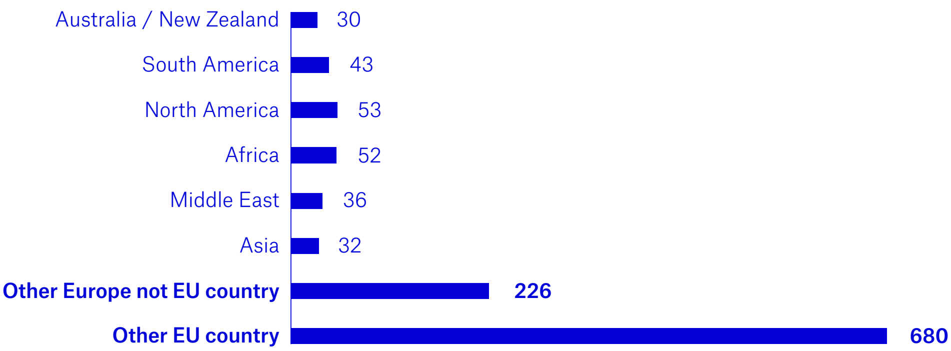


Figure 5.29: Q 3.9 All countries: Which geographical area/s is/are more appealing for your practice.

Q 3.11

In any case, is/are there any specific kind of programs/planning tasks/ building functions that your practice finds/ might find more appealing for participating in an international (not home country) ADC?

Q 3.12

In case of affirmative response to question 3.11, Which programs/ planning tasks/building functions? *(multiple answers possible)*

The **programs, planning tasks, and building functions** most favoured by respondents reflect a strong preference for projects with social and cultural impact. **Educational facilities** lead the ranking with 301 selections (12.3%), highlighting the interest in designing spaces for learning and knowledge-sharing. This is followed by **"Leisure and the arts" (270 responses, 11%)**, **"Public social housing" (263, 10.8%)** also ranks high, indicating a commitment to socially responsible design. **"Other private housing" (242, 9.9%)** and **offices (202, 8.3%)** round out the top five.

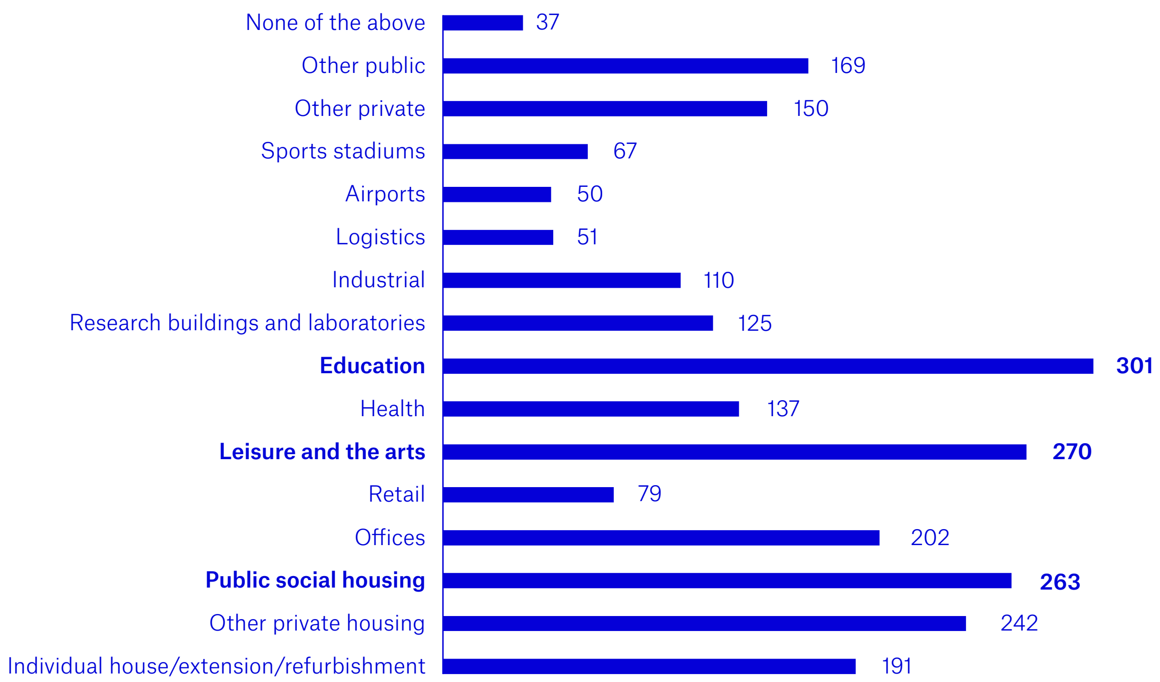


Figure 5.30: Q 3.12 All countries: Motivation to take part in IADC according to kind of function/ program.

Key findings from Question set 03 on the practice's interest in participating in Architectural Design Competitions (ADCs) outside its home country.

National ADCs are widely attended, with 69% of respondents participating. Gender disparities are evident: 74% of men take part, compared to 56% of women. Austria respondents to this survey are clearly engaged with over 60% of participation in transnational ADCs while responding people from Germany or Croatia are less affianced.

Despite the professional value of ADCs, **many respondents rated participation—both nationally and internationally—as "Not Relevant."** In their comments, architects highlighted excessive uncertainty in competition outcomes as a major deterrent, particularly in international settings where factors such as financial risk and unfamiliar regulatory frameworks amplify these concerns.

Among 51 countries mentioned in responses, Switzerland (18.4%), Austria (15.2%), Germany (9.3%), and Italy (8.5%) emerged as the most favoured destinations for international ADCs. **Switzerland remains the primary hub for cross-border participation, while German-speaking countries dominate** due to their linguistic familiarity and well-organized competition systems. Croatian architects express a strong preference for Italy and Slovenia, reflecting cultural and geographic proximity. When asked which geographical zone is most appealing for participation in ADCs outside their home country, a striking 59% of respondents selected "another EU country," underscoring the importance of accessibility and regulatory alignment within the European Union.

Experienced international participants prioritize **professional networking**, the promotion of Baukultur, and financial incentives as their primary drivers. In contrast, architects who have not yet participated in transnational ADCs cite **financial gain as their biggest concern**, followed by networking opportunities and a higher chance of winning. These responses indicate that the perceived economic viability of international competitions significantly influences participation rates.

Architects strongly favour projects with a substantial social and cultural impact. **Educational facilities lead the ranking** (12.3%), highlighting a commitment to designing spaces that foster learning and knowledge exchange. This is followed by leisure and arts (11%), public social housing (10.8%), and private housing (9.9%), reflecting **an inclination toward projects that are well known and with common understanding in all EU countries.**

5.3. Architects interest in transnational ADCs: Practice's results in transnational ADCs

After analysing the interest and motivations behind participating in transnational Architectural Design Competitions (ADCs), the next step is to explore the experiences and outcomes of those who have already taken part. This involves assessing key factors such as their level of success and the benefits gained from participation.

To achieve this, **Question Set 04 focused on investigating whether architectural practices had previously participated in ADCs outside their home country.** The questions were specifically directed at architectural practices, offices, or cooperatives. If the respondent belonged to a one-person practice, they answered based on their individual experience. In cases where the practice involved multiple people, the respondent provided answers on behalf of the entire practice.

This set of question included 12 questions varying in content and length. The most significant results from the questions in this set are analysed in the following paragraphs and pages.

Q 4.1

How many times has your practice taken part in an international ADC outside your home country in the last 5 years?

This question aimed to assess the frequency of participation of architectural practices in international design competitions (ADCs). However, the response rate was relatively low, with a significant number of respondents choosing "Not Specified" (1011 times), suggesting that many either did not recall or preferred not to disclose their level of engagement.

Among the 279 valid responses, the most common selection was **"Only once"** (140 responses, 50.2%), followed by **"2-5 times"** (114 responses, 40.9%). These results highlight a limited recurrence in participation, indicating that for many firms, competing in international ADCs remains an occasional endeavour rather than a regular practice. The findings suggest potential barriers to sustained participation.

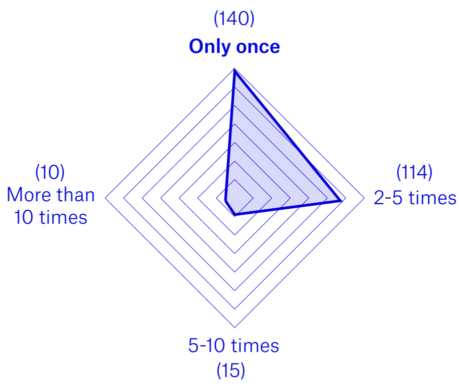


Figure 5.31: Q 4.1 All countries: Respondents times taken part in an international ADC outside home country (value).

Q 4.2

Has your practice ever won FIRST PRIZE in an ADC outside your home country in the last 5 years?

Q 4.3

If positive answer to Q 4.2, In what percentage of cases were you commissioned outside your home country after participating in an architectural/planning competition in the last five years?

These two questions related to success in international ADC and commission after winning and international ADC are analysed together, both in terms of **overall results across all countries** and **segmented by sex at birth and office size.** The goal of this cross-check analysis is to assess the extent of **potential benefits** gained from participating in an international ADC.

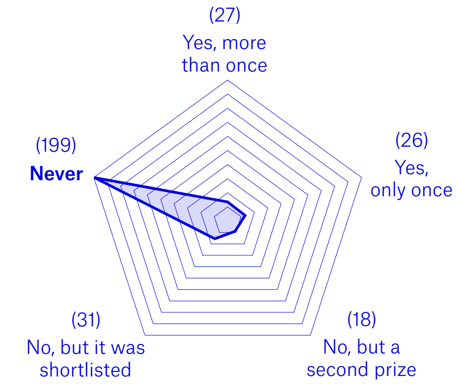


Figure 5.32: Q 4.2 All countries: Respondents' frequency of winning first prize in an ADC outside their home country in the last 5 years.

a) **Globally**, the most common response for both questions was **"Not Specified"** (984 responses for Q4.2 and 1.128 for Q4.3), indicating a low willingness to share information regarding success rates. Among those who did respond, the majority clearly selected **"Never"**, when asked whether they had won **a first prize in the last five years**, remaining the rest of options far behind. **The general success rate is 17%.**

And **"Never"** was also the main response when asked if **winning a competition led to the actual commission of the project**. These results show that, for many, success in international ADCs remains elusive or does not necessarily translate into built projects. **The general securing contract after IADC rate is 22%.**

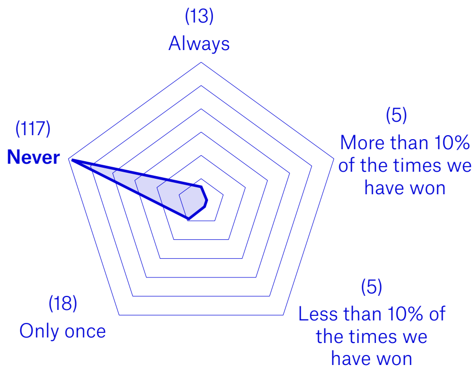


Figure 5.33: Q 4.3 All countries: Percentage of respondents who were commissioned outside their home country after participating in an ADC in the last 5 years.

b) When compared data of survey respondents to **Question 4.2 on success in international ADC the latest five years segmented by country**, except for Austria, "Not Specified" was the most common response, clearly followed by "Never". (Figure 5.35)

Though the success rate (respondents that have won at least once per registered architects per country) is very low among survey respondents, Austria ranks the highest in success rate per registered architects (0.11%), followed by Croatia (0.08%). (Figure 5.34)

c) When compared data of survey respondents to **Question 4.3 on securing contracts after an international ADC segmented by country**, "Not Specified" was the most common response, clearly followed by "Never". (Figure 5.37)

Though the securing contract after international ADC rate is very low among survey respondents, **Austria ranks the highest rate per registered architects (0.11%)**, followed by Croatia (0.03%) and Spain (0.02%). Germany, Hungary, and The Netherlands have a very low rate of 0.01% among respondents to this question. (Figure 5.36)

Q 4.2 Different countries: Success rate in IADCs in latest 5 years

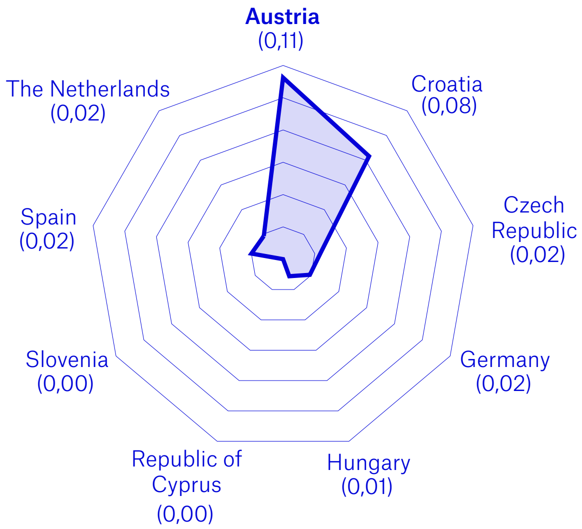


Figure 5.34: Comparison of survey respondents' answers to Q 4.2 on success in international ADC the latest five by country.

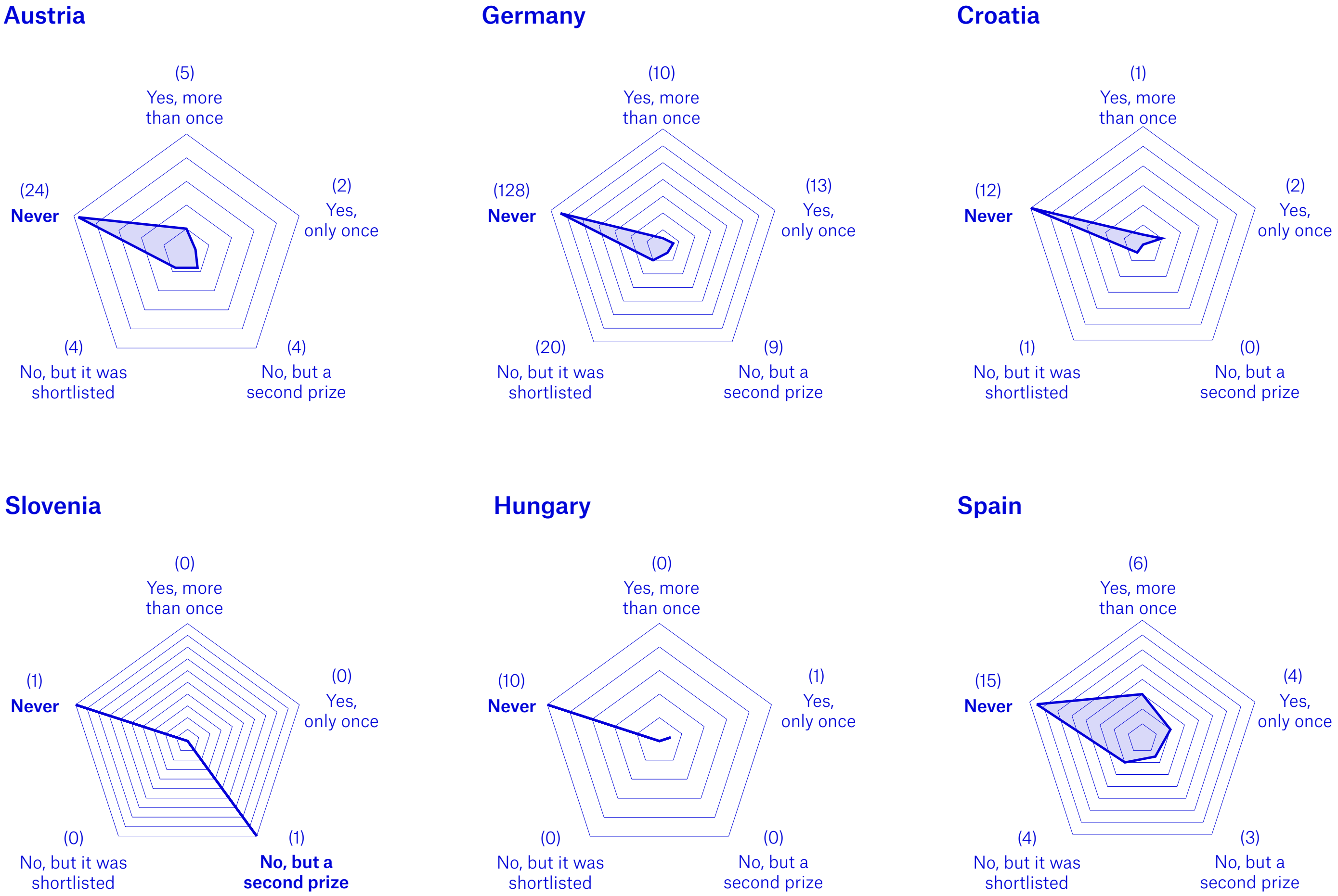


Figure 5.35: Q 4.2 By country: Respondents' frequency of winning first prize in an ADC outside their home country in the last 5 years.

Q 4.3 Different countries: Securing contract after winning IADC by firm size

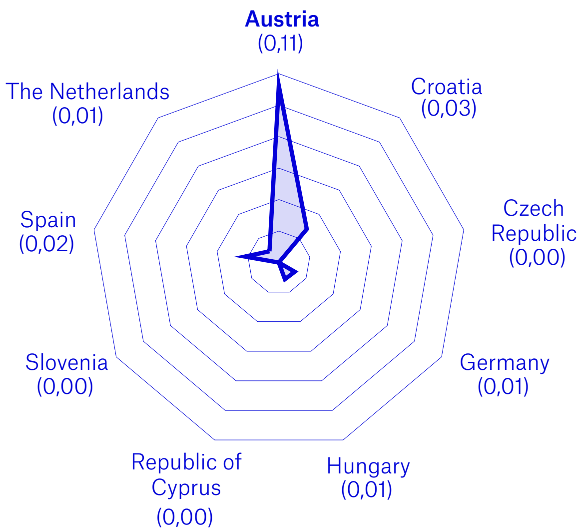
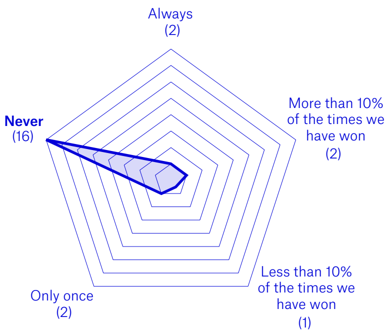
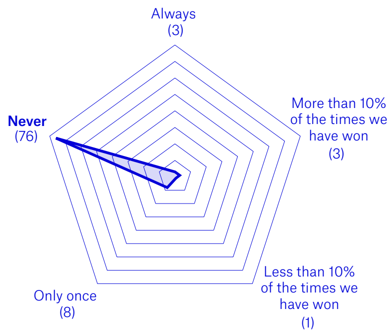


Figure 5.36: Comparison of survey respondents' Answers to Q 4.3 on securing contracts after an International ADC, segmented by country.

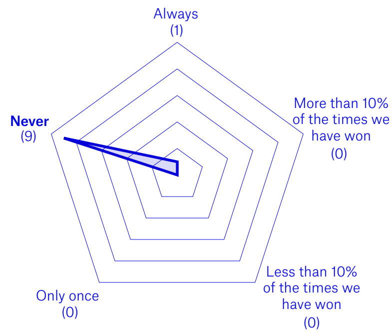
Austria



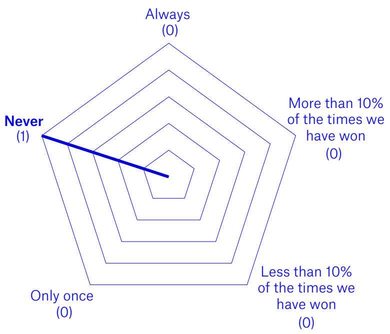
Germany



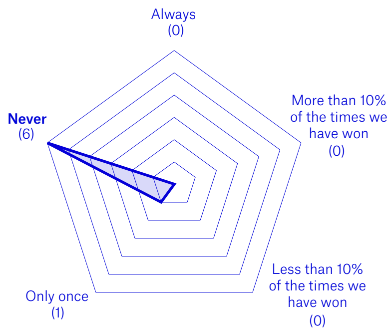
Croatia



Slovenia



Hungary



Spain

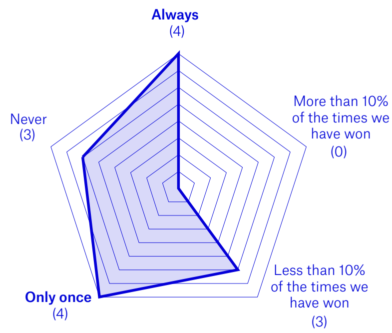


Figure 5.37: Q 4.3 By country: Percentage of respondents who were commissioned outside their home country after participating in an ADC in the last 5 years.

d) When data from these two questions is **disaggregated by sex at birth and firm's size**, it is possible to observe that:

- On success in international ADC:
  - **The general success rate is 17%** (for all respondents from all countries).
  - Only **18% of female respondents** who have participated in an international ADC have won at least once, compared to a similarly low **17% of male respondents** in this survey. This shows similar rates of success both for women and men.
  - Therefore, the most indicated response when asked how many times they had won and IADC was **"Never"** with 76% cases in women respondents and 62% in men respondents. This data shows that men have been shortlisted more times than women.
  - This **firms' size that proves more engaged for women respondents** in taking part in international ADCs (not necessarily with success) is unipersonal offices (31%) followed by 3-5 people (26%). **The size of firm with more successful participation for women** is 3-5 people (27% of successful participation for women respondents) followed by large offices (11-30 and 31-50 people with 18% each one).
  - This **firms' size that proves more engaged for men respondents** in taking part in international ADCs (not necessarily with success) is 3-5 people (21%) followed by 11-30 people (20%) office. The **size of firm with more successful participation for men** is 3-5 people and 11-30 people with same data (12.5% of successful participation for men respondents in both cases).

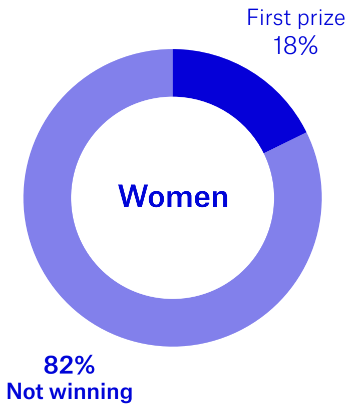
- On securing contracts after international ADC:
  - **The general securing contract after IADC rate is 22%** (for all respondents from all countries).
  - **Only 35% (of the 18% winning an international ADC) of women respondents affirm they have secured a contract after winning an international ADC, compared to a similar proportion of 34% (of the 17% winning an international ADC) of men respondents.** This is a very low rate for offices interests.
  - Therefore, the most indicated response when asked how many times they had secured a contract after winning an international ADC was **"Never"** with 70% cases in women respondents and 72% in men respondents.
  - This **firms' size that has secured more contracts after winning and IADC for women respondents** is 11-30 people (29% of winning proposals with commission after IADC) followed by 31-50 people (14% of winning proposals with commission after IADC).

- This **firms' size that has secured more contracts after winning and IADC for men respondents** is 31-50 people (23% of winning proposals with commission after IADC) followed by 11-30 and more than 50 people (each one, 20% of winning proposals with commission after IADC).

Findings:

- **Success rates in international ADCs are comparable between female and male respondents, as are the chances of securing a contract after winning. The key difference lies in accessibility, with a significant imbalance in entry participation in international ADCs.**
- The **financial rewards** of participating in an international ADC **are minimal**.
- **Medium and large architectural practices have higher success rates in securing commissions** after winning an ADC.

Success in ADC by firm size



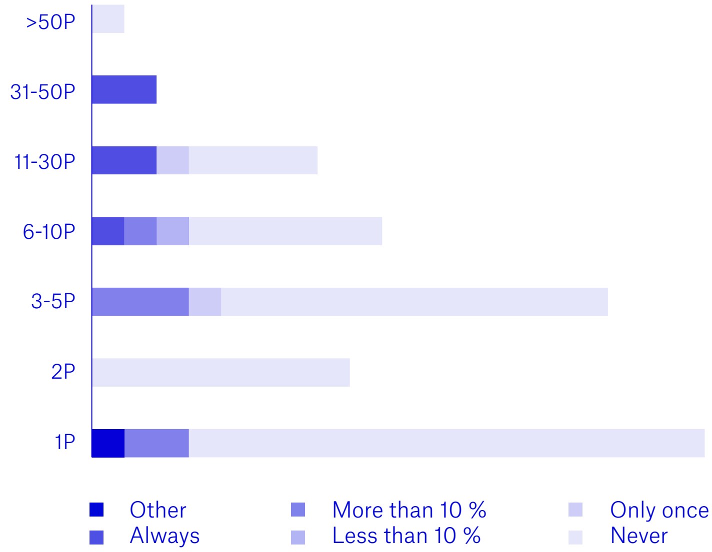
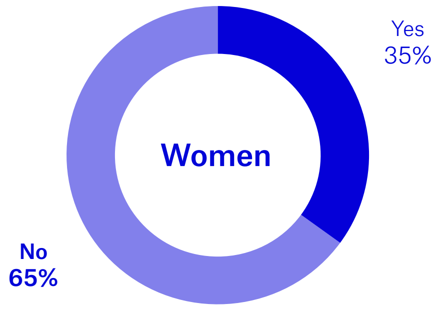


Figure 5.38: Q 4.2 All countries: **Women** success in ADCs (percentage).

Figure 5.39: Q 4.2 All countries: **Women** success in ADCs by firm size (62 responses).

	1P	2P	3-5P	6-10P	11-30P	31-50 P	>50 P	Total
Other	1	0	0	0	0	0	0	1
Yes, more than once	0	0	0	1	2	2	0	5
Yes, only once	2	0	3	1	0	0	0	6
No, but a second prize	0	0	0	1	0	0	0	1
No, but it was shortlisted	0	0	1	0	1	0	0	2
Never	16	8	12	6	4	0	1	47
Not specified (300)								19
Total	19	8	16	9	7	2	1	62

Securing contract after winning IADC by firm size



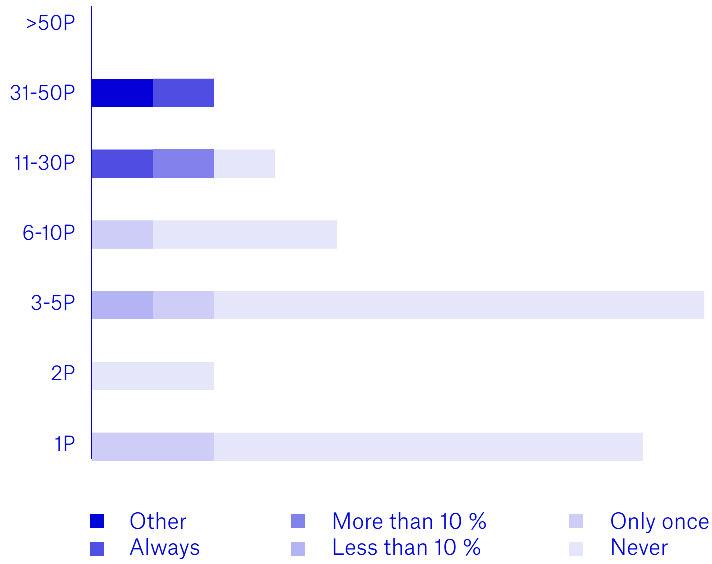
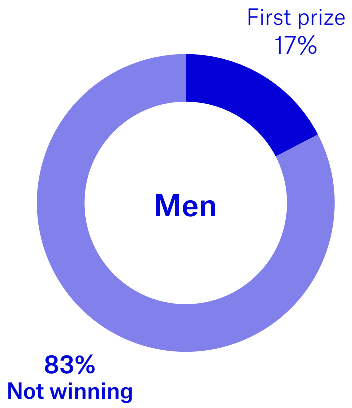


Figure 5.40: Q 4.3 All countries: **Women** contract after IADCs (percentage).

Figure 5.41: Q 4.3 All countries: **Women** securing contract after winning IADC by firm size (30 responses).

	1P	2P	3-5P	6-10P	11-30P	31-50 P	>50 P	Total
Other	0	0	0	0	0	1	0	1
Always	0	0	0	0	1	1	0	2
More than 10%	0	0	0	0	1	0	0	1
Less than 10%	0	0	1	0	0	0	0	1
Only once	2	0	1	1	0	0	0	4
Never	7	2	8	3	1	0	0	21
Not specified (333)								
Total	9	2	10	4	3	2	0	30

Success in ADC by firm size



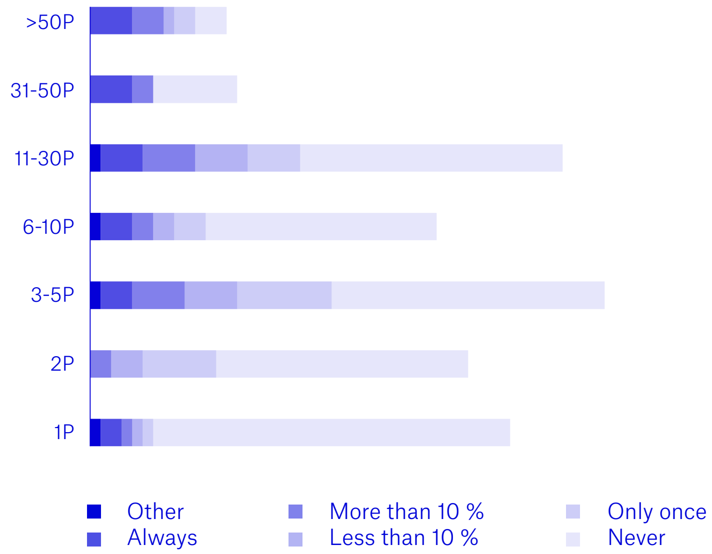
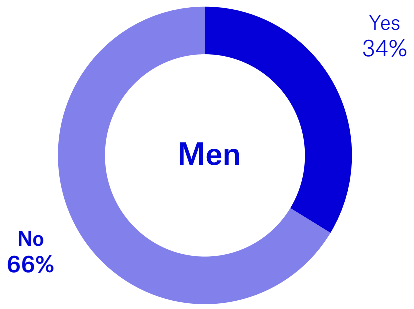


Figure 5.42: Q 4.2 All countries: **Men** success in ADCs (percentage).

Figure 5.43: Q 4.2 All countries: **Men** success in ADCs by firm size (230 responses).

	1P	2P	3-5P	6-10P	11-30P	31-50 P	>50 P	Total
Other	1	0	1	1	1	0	0	4
Yes, more than once	2	0	3	3	4	4	4	20
Yes, only once	1	2	5	2	5	2	3	20
No, but a second prize	1	3	5	2	5	0	1	17
No, but it was shortlisted	1	7	9	3	5	0	2	27
Never	34	24	26	22	25	8	3	142
Not specified (650)								
Total	40	36	49	33	45	14	13	**230**

Securing contract after winning IADC by firm size



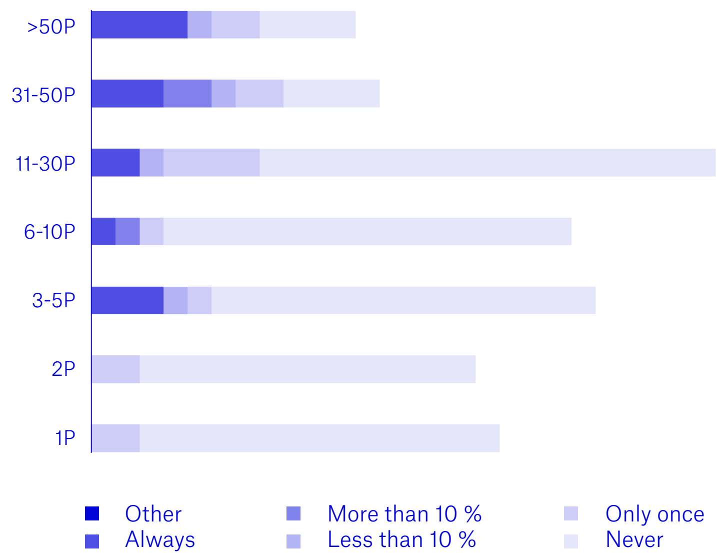


Figure 5.44: Q 4.3 All countries: **Men** contract after IADCs (percentage).

Figure 5.45: Q 4.3 All countries: **Men** securing contract after winning IADC by firm size (123 responses).

	1P	2P	3-5P	6-10P	11-30P	31-50 P	>50 P	Total
Other								
Always	0	0	3	1	2	3	4	13
More than 10%	0	0	0	1	0	2	0	3
Less than 10%	0	0	1	0	1	1	1	4
Only once	2	2	1	1	4	2	2	14
Never	15	14	16	17	19	4	4	89
Not specified (758)								
Total	17	16	21	20	26	12	11	**123**

Q 4.5

Did your practice collaborate with an established local practice in the country that launched the ADC DURING ITS PREPARATION? Please provide details in your comments (Q 4.12), including the country, the size of the local practice, and whether the experience was positive.

Q 4.6

Did your practice collaborate with an established local practice in the country that launched the ADC DURING ITS CONSTRUCTION period?

These questions aimed to determine whether those who had previously participated in international ADCs had collaborated with local firms during both the competition proposal phase and the subsequent project development after securing a contract. Once again, these questions received very few responses, with 1.018 respondents selecting "Not Specified" for Q 4.5 and 1.074 for Q 4.6.

Among the 272 responses to Q 4.5 (without any disaggregation), **40% indicated that they collaborated with a local team during the competition proposal phase**. Meanwhile, 21% did not collaborate but believed it would have been beneficial, and 39% did not work with a local team during that stage.

Among the 216 responses to Q 4.6 (without any disaggregation), 31% indicated that they collaborated with a local team during the construction phase of the commissioned project after the competition. Meanwhile, 21% did not collaborate but believed it would have been beneficial, while **48% did not work with a local team during construction stage.**

While responses to Q 4.5 are more varied but indicates some collaboration with local offices during proposal phase, Q 4.6 clearly indicates a tendency toward non-collaboration during the construction phase. This aligns with the low rate of commissioning following international ADCs, as well as the fact that most awarded contracts go to medium or large firms, which have greater in-house resources to manage such projects independently.

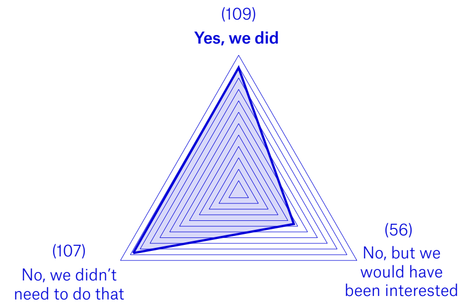


Figure 5.46: Q 4.5 All countries: Collaboration with local practices during IADC preparation (value).

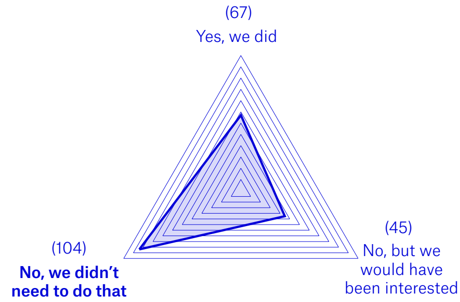


Figure 5.47: Q 4.6 All countries: Collaboration with local practices during IADC construction phase (value).

Q 4.7

What percentage of your office's income comes from contracts signed after an international ADC outside of your home country?

This question also received a low response rate, with 1.007 respondents selecting "Not Specified" and only 283 providing relevant information.

Among these 283 responses, and consistent with previous findings, the most common answer (without disaggregation) was **0%, accounting for 71% of responses**. An additional 21% indicated that revenue from contracts obtained through international ADCs contributed less than 15% of their firm's total earnings. Only 2% reported that such contracts accounted for more than 60% of their firm's profits.

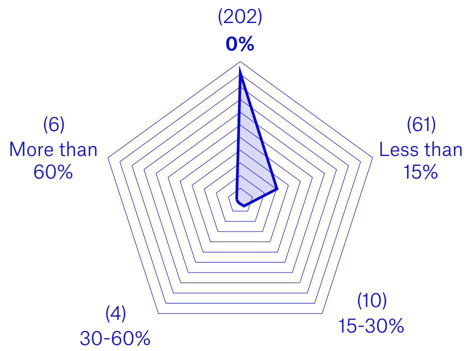


Figure 5.48: Q 4.7 All countries: Percentage of office's income from contracts after IADC.

These findings further confirm the minimal financial impact of international ADCs on the overall economic sustainability of architectural firms

Q 4.8

In what kind of ADCs has your practice participated abroad, whether you have won or not, in the last 5 years? (multiple answers possible)

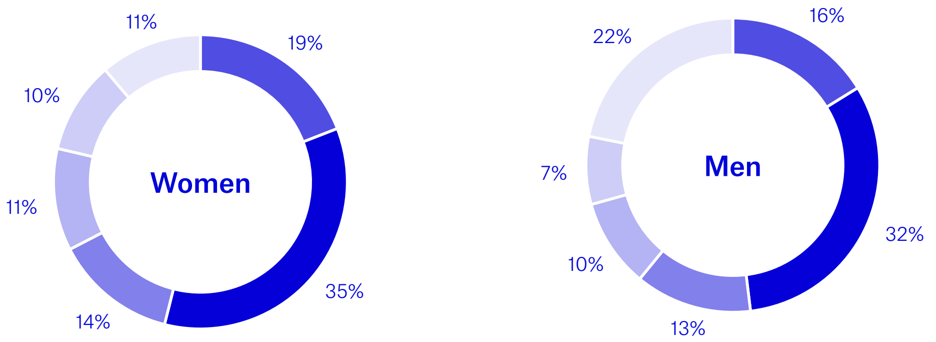
This question also received a low response rate. The most frequently reported competition type is **open competitions**, with 1**55 instances (31.63% of effective responses)**, indicating that this format was the most commonly experienced among respondents. This is followed by **competitions by direct invitation**, with **95 mentions (19.39%)**, and **anonymous competitions,** reported **80 times (16.33%)**. **Restricted competitions** were reported 62 times (12.65%), while **phased competitions** were mentioned in 48 cases (9.80%). **Single-stage competitions** were noted 38 times (7.76%). This distribution shows open and direct-invitation types being the most prevalent across the dataset.

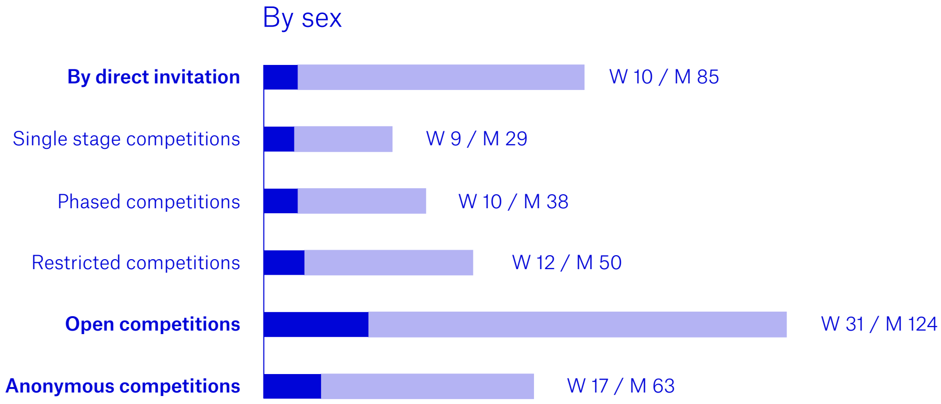
However, the available data was disaggregated by sex at birth, with **89 responses from women** and **389 responses from men**. This segmentation revealed the following insights:

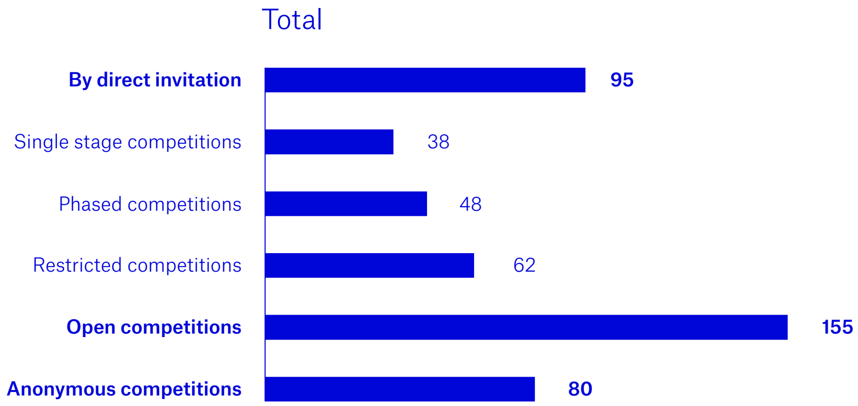
- The most common type of international competition participated in over the past five years was **"Open competition"**, chosen by **35% of women** and **32% of men**.
- The second most common type differed between genders: **19% of women** selected **"Anonymous competition"**, whereas **22% of men** reported participating **"By direct invitation"**.
- **Direct invitation** was significantly less common for **women (11%)** compared to **men (22%)**, highlighting a structural disparity in the criteria governing invitations, which warrants further investigation.
- **Multi-phase competitions** also had low participation rates, with **11% of women** and **10% of men** reporting involvement.

> *[Germany, man, 51-60 years old, firm size of 2 people]: "The competition system focusses on large offices. Small offices are excluded due to preconditions."*
>
> *[Germany, not specified, 51-60 years old, firm size of 2 people]: "Small offices have no chance of even coming close to fulfilling the competition requirements. For example, a kindergarten/school tender... Without a reference list of at least three to five projects already realised, these offices will not be accepted, the same applies to the number of employees, etc."*

IADC in the latest 5 years







	Women	% resp.	Men	% resp.
Anonymous competitions	17	19 %	63	16 %
Open competitions	**31**	**35 %**	**124**	**32 %**
Restricted competitions	12	14 %	50	13 %
Phased competitions	10	11 %	38	10 %
Single stage competitions	9	10 %	29	7 %
By direct invitation	10	11 %	85	22 %

Figure 5.49: Q 4.8 All countries: Kind of international ADCs in latest 5 years by sex.

Q 4.9

How do you typically find out about ADCs taking place outside your home country?

This question aims to determine how architects learn about international competition announcements. Given the low response rate, the analysis was conducted both globally and, where possible, disaggregated by country, sex at birth, and office size (limited to Austria and Germany due to response volume). From the available responses, the following conclusions can be drawn:

- **Globally, 35%** of respondents reported learning about international competitions through their **national Chamber of Architects** and social media serves as an information source for 22.8% of respondents, closely followed by 22% who rely on their national public procurement platforms.

  [Spain, man, 51-60 years old, firm size of 2 people]: "We have not participated in competitions outside our country of origin due to lack of information about the calls for such competitions"

  [Germany, woman, 61-70 years old, firm size of 3-5 people]: "We do not take part in competitions in Germany either, because construction projects that match our specialisation are rarely put out to tender."

- In **Austria, 51%** of respondents obtain information through their **Chamber of Architects**, while 20.5% rely on TED, the EU Tender Portal, and 18% use Austria's public procurement platforms. Social media plays a minor role, with only 8% using it as a source.

- **Gender-based disaggregation** in Austria shows similar proportions across male and female respondents. **Office size disaggregation** in Austria does not reveal significant variations in how competition information is sourced.

- In **Germany, 30.8%** architects responding this survey primarily obtain competition information through their **Chamber of Architects**, followed by 25.8% who rely on Germany's public procurement platforms and 16.5% who use TED, the EU Tender Portal. Social media accounts for 10.5% as an information source.

- **Gender-based disaggregation** in Germany shows similar proportions across male and female respondents. **Office size disaggregation** in Germany does not reveal significant variations in how competition information is sourced.

- In general, information about international **competitions does not seem to be directly communicated to architects through ACE's official channels**. Instead, architects primarily rely on national institutions and digital platforms to stay informed about competition opportunities. This suggests that ACE primarily disseminates information through national Chambers of Architects rather than reaching individual architects directly, which aligns with its role as a coordinating body.

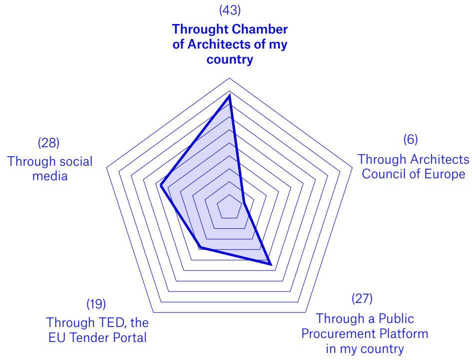


Figure 5.50: Q 4.9 **All countries**: Finding out about IADC outside home country.

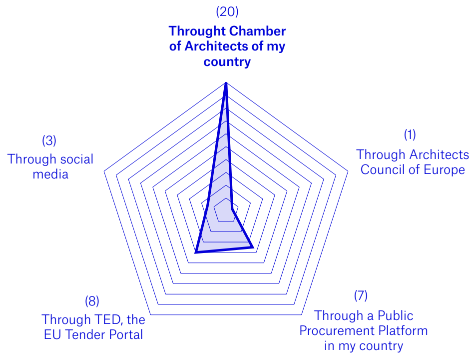


Figure 5.51: Q 4.9 **Austria**: Finding out about IADC outside home country.

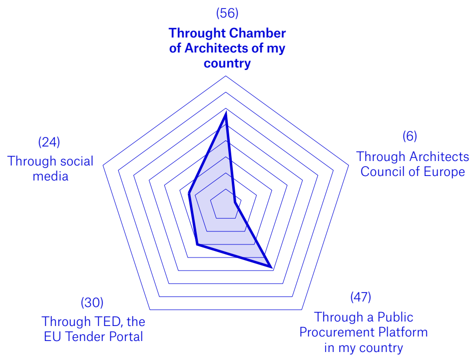


Figure 5.52: Q 4.9 **Germany**: Finding out about IADC outside home country.

The Chambers of Architects in Germany and Austria stand out as particularly effective in keeping their members informed. A significant percentage of architects in these countries rely on these professional bodies for updates, underscoring their role as structured and trusted sources of information. However, due to insufficient data from other partner and cooperating partner countries, it remains unclear whether similar levels of efficiency are present elsewhere.

Q 4.10

How would you describe your practice's overall experience when participating in ADCs outside your home country?

Q 4.11

Has participating in ADC outside your home country impacted your PRACTICE/ FIRM professional growth and development?

Once again, these questions received a low response rate and were therefore analysed only at a global level.

Most responses clearly indicate that the experience of participating in an international ADC was perceived as neutral, with most respondents stating that it had no impact on the professional development of their firm.

[Germany, man, 61-70 years old, firm size of 1 person]: ""Competitions in Germany and building in general are no longer fun because the regulations and laws are so extensive that it is not really worthwhile. There is no longer an actual architectural competition, the organisers and the well-known architectural firms are too heavily influenced!"

[Germany, man, 41-50 years old, firm size of 3-5 people]: "Best regulated competitions? In our experience, competitions are far too heavily regulated and restrictive. In principle, much more freedom and less regulation are needed to develop imaginative ideas for the future. Let architects create - not civil servants and lawyers regulate"

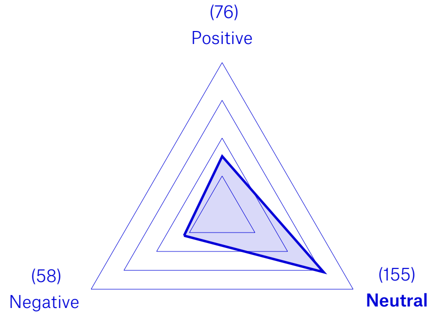


Figure 5.53: Q 4.10 All countries: Practice experience in IADC.

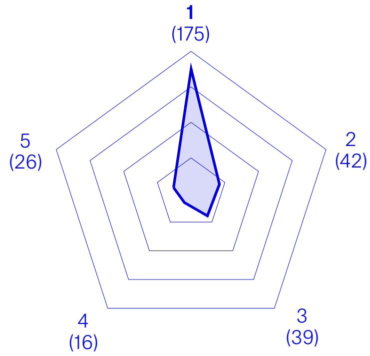


Figure 5.54: Q 4.11 All countries: IADC impact on office.

Key findings from Question Set 04 focused on investigating whether architectural practices had previously participated in ADCs outside their home country

Most respondents reported **limited participation in international ADCs, with 50.2% having competed only once in the past five years and 40.9% participating between two and five times**. The response rate to this question was low, with many respondents selecting “Not Specified.” These figures indicate that for most architectural firms, international ADCs are an occasional rather than a recurring practice.

A significant portion of respondents indicated little success in international ADCs. Among those who answered, the most common response to winning first prize in an international ADC was “Never.” Similarly, securing a contract after winning an ADC was rare.

Disaggregating the data by gender and firm size reveals further insights. **Success rates in international ADCs were comparable between female and male respondents, with only 18% of female and 17% of male participants having won at least once**. However, men were shortlisted more frequently, as evidenced by 76% of female respondents selecting “Never” when asked how many times they had won, compared to 62% of men. Women primarily participated in ADCs from one-person firms (31%) or small offices of 3-5 people (26%). The most successful participation rate for women was found in 3-5 person firms (27%) and medium-sized offices (11-30 and 31-50 people, 18% each). In contrast, men were most active in ADCs from 3-5 person offices (21%) and 11-30 person offices (20%), with the most successful participation in 3-5 person and 11-30 person firms (12.5% each).

Regarding the ability to secure contracts after winning an international ADC, the results were similarly low. Only 35% of female and 34% of male respondents who won an international ADC confirmed securing a contract, which is an exceptionally low rate of return. The most common response when asked if winning led to a commission was “Never,” reported by 70% of women and 72% of men. Women were most successful in securing commissions from 11-30 person firms (29%), followed by 31-50 person firms (14%). For men, the highest success rate was in 31-50 person firms (23%), followed by 11-30 and 50+ person firms (20%). **These findings highlight that medium and large firms are better positioned to translate ADC success into commissions, while smaller offices face more difficulties in securing projects after winning a competition.**

Collaboration with local firms was another important aspect explored in the survey. The findings suggest that **while collaboration was somewhat common during the competition proposal phase, it was significantly lower during the construction phase**. Of the respondents, 40% indicated that they worked with local firms during the proposal stage, while 39% did not, and 21% believed collaboration would have been beneficial. During the construction phase, 31% collaborated, 21% did not but believed it would have been beneficial, and 48% did not collaborate at all. The lower collaboration rate during the construction phase aligns with the overall low number of commissions awarded post-competition and the dominance of medium and large firms, which often have the resources to manage projects independently.

The financial impact of participating in international ADCs appears negligible. Among the 283 responses analysed, the most common answer was 0%, with 71% of respondents stating that they earned no revenue from contracts secured through international ADCs. An additional 21% reported earning less than 15% of their firm's income from such contracts, while only 2% stated that international ADCs contributed more than 60% of their firm's profits. **This confirms that international ADCs have little to no economic impact on the sustainability of most architectural firms**.

The survey also explored the types of ADCs architects participated in over the past five years. **The most common type was "Open competition," selected by 35% of female and 32% of male respondents**. The second most common type varied by gender: 19% of women selected "Anonymous competition," whereas 22% of men reported participating in competitions "By direct invitation." **Direct invitations were significantly less common for women (11%) than for men (22%), suggesting structural disparities in how architects are invited to participate**. Multi-phase competitions had generally low participation rates, with only 11% of women and 10% of men engaging in them.

Another fundamental issue was how architects learned about ADC opportunities. **The results showed that globally, 35% relied on their national Chamber of Architects**, while 22.8% used social media, and 22% accessed public procurement platforms. In Austria, 51% obtained information from their Chamber of Architects, followed by TED (20.5%) and Austria's public procurement platform (18%), while social media played a minor role at 8%. In Germany, 30.8% relied on their Chamber of Architects, followed by 25.8% using Germany's public procurement platform and 16.5% using TED, with social media at 10.5%. The Chambers of Architects in Germany and Austria proved to be highly effective in informing architects about ADCs. However, due to insufficient data from other countries, it remains unclear whether similar levels of efficiency exist elsewhere. Additionally, the survey revealed that information about international ADCs is not widely disseminated through ACE's communication channels, suggesting that ACE primarily informs national Chambers rather than individual architects.

Finally, the survey examined the overall experience of participating in international ADCs and whether it impacted professional growth. The results were largely neutral, **with most respondents indicating that participation had no significant effect on their firm's development. This aligns with other findings, reinforcing that international ADCs remain an occasional rather than regular endeavour for most firms, do not necessarily lead to commissions, and provide minimal financial returns.**

5.4. Knowledge, skill gaps and barriers

After establishing the profile of survey respondents, personally and professionally, and assessing their interest and participation in international ADCs, it is important to understand the challenges they have faced—or may face—when engaging in these architectural competitions. To gain deeper insights, the survey includes the Question set 05, specifically designed to explore these obstacles.

Therefore, Question set 05 asked **About your practice's experience when participating in an ADC abroad concerning KNOWLEDGE, SKILL GAPS and BARRIERS**. The questions were specifically directed at architectural practices, offices, or cooperatives. If the respondent belonged to a one-person practice, they answered based on their individual experience. In cases where the practice involved multiple people, the respondent provided answers on behalf of the entire practice.

This set of question included 4 questions varying in content and length. The most significant results from the questions in this set are analysed in the following paragraphs and pages.

Q 5.1

To what extent did you/ your practice encounter knowledge or skill gaps when participating in ADCs outside your home country? (1 being Not relevant/ 5 being Very Relevant)

This question also received a low response rate, with 987 respondents selecting "Not Specified." Among the **303 recorded responses, 38% chose 3, the midpoint between "Not Relevant" (1) and "Very Relevant" (5)**. The second most selected option was 1 ("Not Relevant") at 28%, followed by 2 at 20%. Meanwhile, only 4.3% of respondents considered this issue "Very Relevant" (5).

The overall response pattern suggests that survey participants—whether representing an architectural office or an individual practice—generally feel positive in handling the challenges associated with international ADCs. Their responses indicate confidence in their ability to navigate the different phases of these competitions and address potential issues effectively.

However, some comments by respondents go in opposite direction:

> *[Germany, man, 51-60 years old, firm size of 3-5 people]: "Our office is too small to take part in complex international competitions and to be able to realise the projects later on."*
>
> *[Germany, man, 61-70 years old, firm size of 11-30 people]: "Despite official freedom of movement within Europe, actual market access is virtually impossible, and market foreclosure is the rule. Far too much effort and bureaucracy for foreign activities!"*

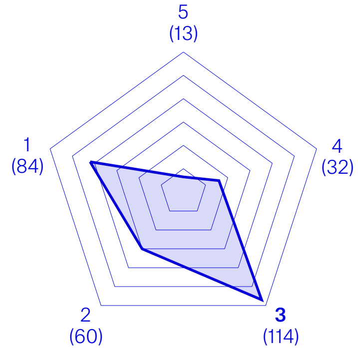


Figure 5.55: Q 5.1 All countries: Relevance of skill gaps when IADC (1 Not relevant/5 Very relevant).

[Germany, man, 51-60 years old, firm size of 3-5 people]: "In my previous experience with international competitions, there are unfortunately countries (even within the EU) that claim to be "open" to others, but only want local prize-winners! This bigoted attitude is a real problem, partly because you can only find out afterwards.

Q 5.2

What are the potential barriers or challenges that might discourage your practice from participating in an ADC outside your home country? (multiple answers possible)

This question aligns with the **ACE questionnaire criteria**, maintaining the same **14 response options** and allowing multiple selections. The purpose of this approach is to **identify the specific barriers architects face in international ADC** and compare them with the challenges observed in the broader professional landscape. By doing so, the survey enables a more targeted analysis of the difficulties encountered in ADCs and how they differ from general industry obstacles.

Once again, this question received a **low response rate**, with **291 respondents** selecting a total of **1.235 options**, averaging **4 to 5 choices per person.** This data has been analysed globally and segregated by country and firm size, when possible, as is the case of Austria, Germany and Croatia.

GLOBALLY

These responses provide a global perspective, allowing respondents from all countries to identify their primary challenges shown in this graphic:

Figure 5.56: Q 5.2 All countries: Barriers (value).

When analysing **barriers on a global scale**, the following patterns emerge:

- The most frequently cited challenge is the **significant effort and financial investment required to take part in an international ADC (12.5% of responses)**, highlighting the resource-intensive nature of international ADCs as a major limitation for participation.

- **Language barriers (11.3% of responses) and unfamiliarity with specific country regulations (10%)** rank among the top concerns, emphasizing that cross-border competitions often pose administrative and communication difficulties. Additionally, **the perceived low probability of winning (9.8%)** suggests that many architects see these competitions as high-risk with limited chances of success, with limited or low return on investment.

- **Local-specific mindsets and planning expectations (8.8% of responses)**, along with **physical distance constraints (7.4%)**, reveal how regional design norms and logistical challenges impact participation. Likewise, **language-related difficulties (7.1%)** reinforce the idea that communication barriers remain a significant obstacle in international settings.

- Financial and contractual concerns are also significant. **The inability to meet required turnover thresholds (6.6% of responses)** suggests that many smaller firms struggle to qualify for participation. Meanwhile, **the risk of not securing a design contract even after winning an ADC (5.7%)** and **fears associated with accepting contracts abroad (6%)** indicate a lack of confidence in the reliability and feasibility of international projects. Additionally, **fee disparities between home and target markets (4.5%)** may create uncertainty in financial planning.

- Clarity in competition guidelines also appears to be a concern. **Unclear conditions regarding the expected outcome of the architectural design (4% of responses)** and **restrictive or exclusionary criteria (0.7%)** point to concerns about transparency and accessibility. Moreover, **concerns about firms' knowledge and expertise (3.5% responses)** suggest that firms may feel underqualified or lacking in experience for certain ADCs.

If we analyse the barriers reported by all respondents but focus only on **small offices** (one- and two-person offices, representing 49% or 626 respondents), we find that among the 103 individuals who selected a total of 412 different barriers, the most frequently cited ones are:

- The most frequently mentioned barrier is that **participating requires a significant amount of effort and money, cited by 63 respondents or 15.29%** of these 412 barriers. **Unfamiliarity with specific country regulations follows with 51 responses (12.38%), while 46 respondents (11.17%) indicated that their office could not meet the demanded turnover threshold. Language barriers were noted by 43 respondents (10.44%), and 39 respondents (9.47%) believe the likelihood of winning is too low.**

- Other reported barriers include local context issues related to program, planning tasks, or building functions (32 responses, 7.77%), restraints due to the physical distance from the project location (28 responses, 6.80%), and the risk of not signing the design contract after winning the competition (26 responses, 6.31%). Challenges posed by language differences and fears of accepting contracts abroad were each selected by 24 respondents (5.83%).

- Fee differences between home and target markets were cited by 11 respondents (2.67%). Unclear conditions for the expected design outcomes were identified by 17 respondents (4.13%), while 6 respondents (1.46%) referred to the limited knowledge or expertise within their office. The least mentioned barrier, noted by only 2 respondents (0.49%), was the restrictive or unclear nature of excluding criteria in the competition brief.

Figure 5.57: Q 5.2 All countries/Small offices (49% of respondents): Barriers (value).

When analysing **barriers by country**, the patterns shift slightly when examined alongside other criteria:

AUSTRIA

Barriers faced by individuals residing in Austria, in general:

- The most cited challenge is **unfamiliarity with specific country regulations (13.8%)**, highlighting the difficulty of navigating foreign legal and administrative frameworks. This is closely followed by **language barriers (13%)**, which emphasizes the communication difficulties architects encounter when working across borders.
- Another significant obstacle is **the substantial effort and financial cost required for participation (10.9%)**, which aligns with global trends where the high investment needed for these competitions is a major deterrent. Similarly, **local-specific mindsets and planning contexts (10.9%)** are seen as a barrier, suggesting that architects may struggle to adapt their proposals to different cultural or regulatory expectations. Additionally, the perceived **low probability of winning (9.4%)**—along with these other barriers—further discourages participation.
- **Restraints due to physical distance (8%)** also rank among the notable concerns, indicating that logistical challenges—such as site visits, collaboration with local partners, and project management—pose difficulties for Austrian architects. Additionally, **challenges posed by language differences (7.2%)** further reinforce the importance of linguistic adaptability in international competition settings.

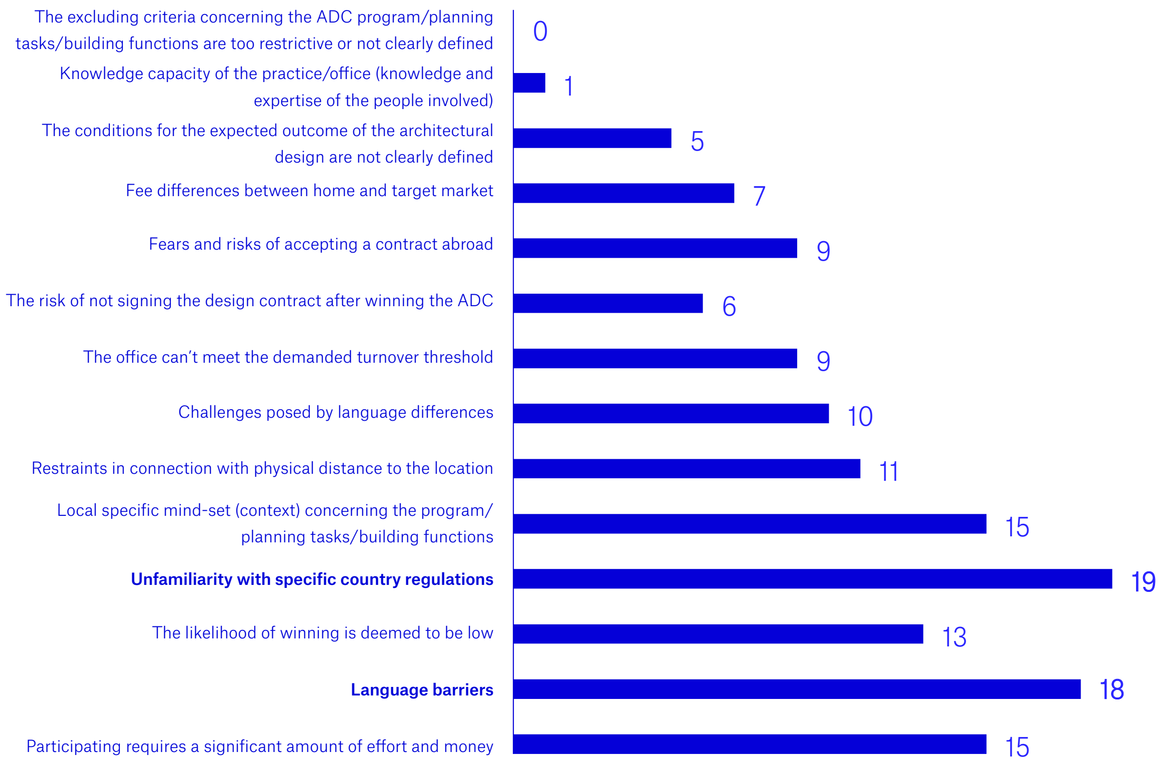


Figure 5.58: Q 5.2 Austria: All respondents barriers (value).

Barriers faced by individuals residing in Austria, disaggregated by sex at birth:

- Among multiple responses emitted by **women** living in Austria (33), the highest-ranked barrier (comparison only among responses by women respondents in Austria) **was the effort and financial cost required for participation** (21.2%), followed by **the low probability of winning** (18.2%). Unfamiliarity with specific country regulations and local-specific mindsets or contexts were both ranked third (15.15% each). These barriers underscore the challenging economic balance faced by these firms.

- Among multiple responses emitted by **men** living in Austria (105), the highest-ranked barrier (based on a comparison only among responses by men in Austria) was the **language barrier** (15.2%), followed by **unfamiliarity with specific country regulations** (13.3%). Additionally, local-specific mindsets or contexts and challenges posed by language differences (9.5% each) highlight difficulties in flexibility and adaptation to different scenarios.

Barriers faced by practices located in Austria, disaggregated by firms' size:

- Among respondents from **unipersonal offices or practices** (15), the primary concern was the **inability to meet the required turnover threshold** (26.7% of responses among pool of survey respondents), alongside unfamiliarity with specific country regulations (26.7%), followed by language barriers, challenges posed by language differences and the low probability of winning (20% each) showing difficulties in firms' economic structure.

- Among respondents from **3-5 people practices** (22) the primary barriers are **the substantial effort and financial cost required for participation** and **unfamiliarity with specific country regulations** (27.3 % each), followed by language barriers and the low probability of winning (22.7% each), also showing difficulties in firms' economic structure.

- Among respondents from **practices with more than 30 people** (5), the top-ranked barrier was the **language barrier** (80%), followed by constraints related to physical distance from the location and challenges posed by language differences (40% each). These findings suggest a structured internal dynamic within larger firms, which may limit their ability to navigate uncertainty.

	Responses	% Responses over total resp.	% Size firms from ADC Map	Number of firms	% Responses over num. of firms
1P	15	22.1	63	1629	0.9
2P	12	17.6	22	569	2.1
3-5P	22	32.4	10	259	8.5
6-10P	11	16.2	3.5	91	12.2
11-30P	6	8.8	1	26	23.2
31-50P	3	4.4	0.5	13	38.5
>50P	2	2.9			
Total	**71**	104.4	100	**2586**	2.7

Figure 5.59: Q 5.2 Austria: Responses by size of firm.

Austria: survey female/male respondents' barriers by size of firm

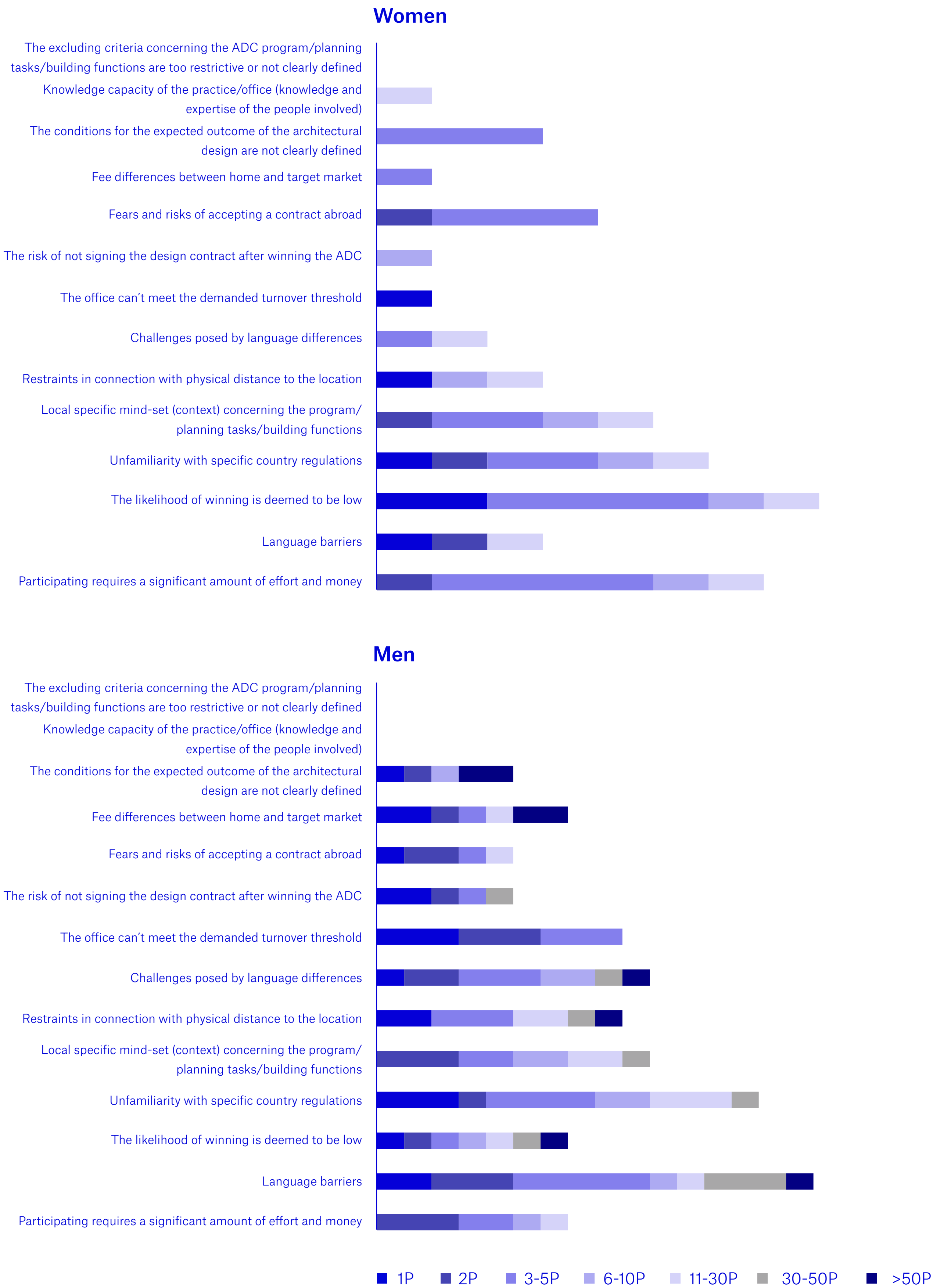
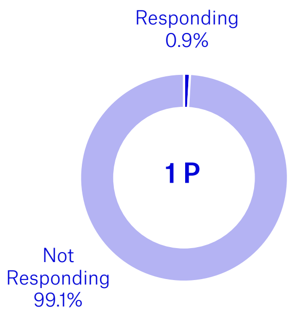
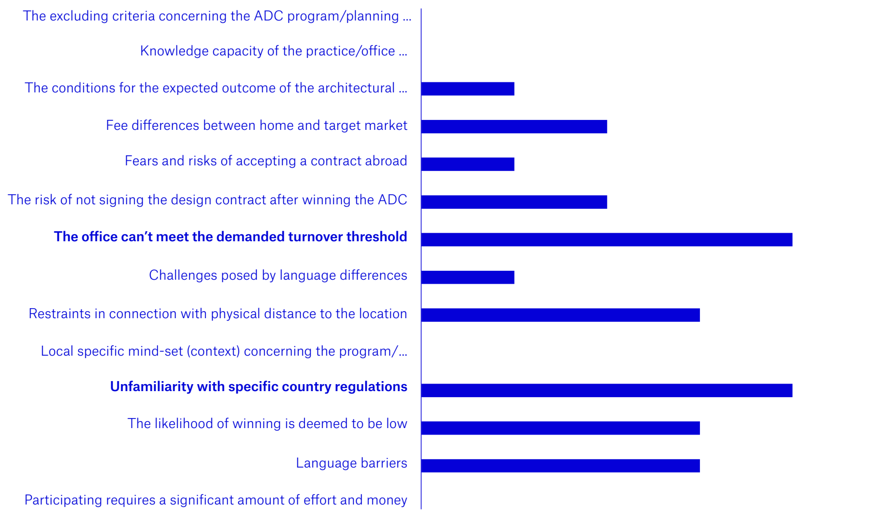
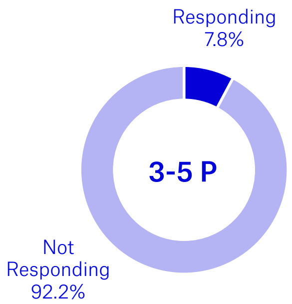


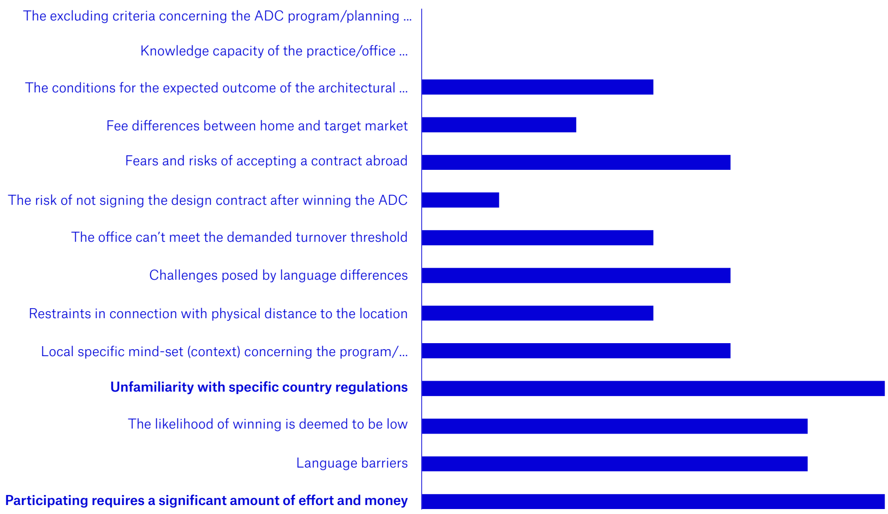
Figure 5.60: Q 5.2 Austria: survey female/male respondents' barriers by size of firm.

Austria: survey respondents' barriers by size of firm









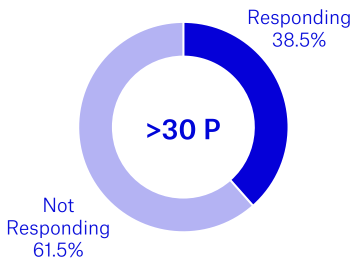


Figure 5.61: Q 5.2 Austria: Percentage of firms 1P/3-5P/>30P responding survey from pool of firms of this size.

Figure 5.62: Q 5.2 Austria: % of barriers for offices 1P/3-5P/>30P in relation to the pool of responses by firm size.

GERMANY

Barriers faced by individuals residing in Germany, in general:

- The most cited challenges are the **substantial effort and financial cost required for participation** and **language barriers** (12.3% each). Additionally, the **low probability of winning** and **unfamiliarity with specific country regulations** (11% each) further discourage participation, highlighting concerns about competition viability and the complexity of navigating foreign legal frameworks.

- Adapting to **local planning contexts** (7.8%) and **managing physical distance constraints** (7.3%) create additional difficulties. Language differences (7.9%) add complexity, even when a common language is spoken. **Financial hurdles**, such as failing to meet turnover thresholds (6.6%) and fee disparities between markets (5.2%), limit competitiveness.

- Uncertainty around securing contracts post-win (6.6%) and risks tied to working abroad (6.7%) further prevent firms, as do unclear competition expectations (4.3%). Smaller firms also struggle with limited expertise (1.5%).

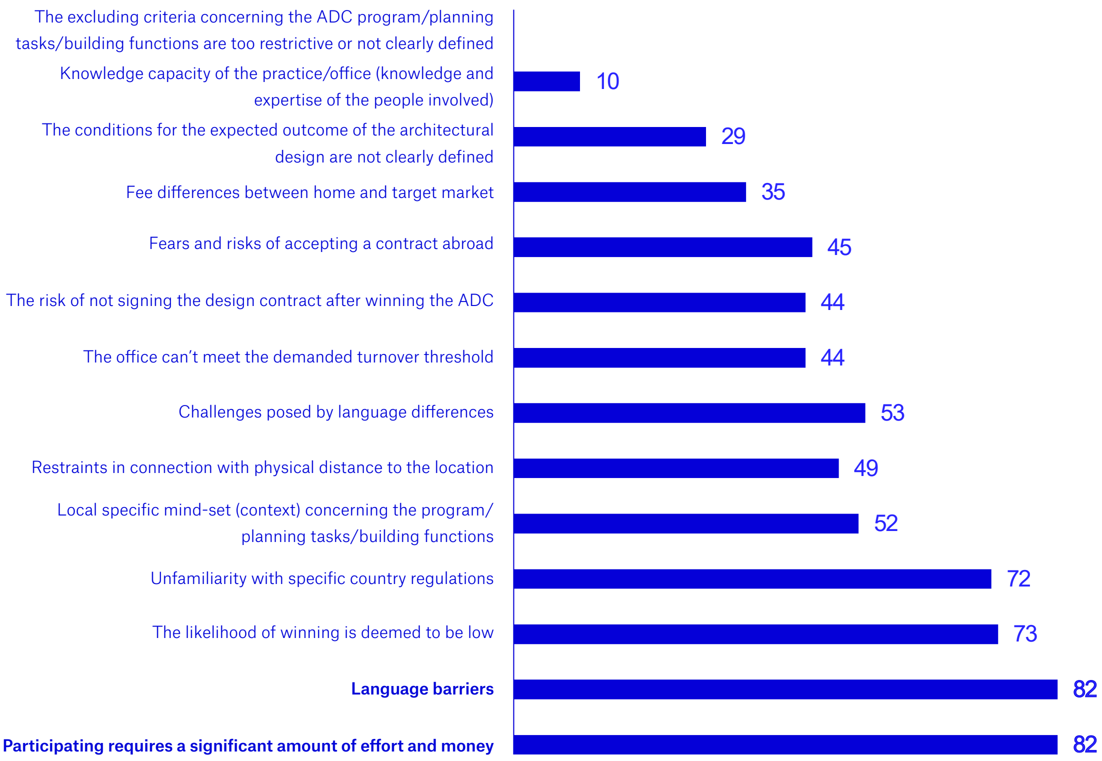


Figure 5.63: Q 5.2 Germany: All respondents barriers (value).

Barriers faced by individuals residing in Germany disaggregated by sex at birth:

- Among multiple responses emitted by **women** living in Germany (78), the highest-ranked barrier (comparison only among responses by women respondents in Germany) was the **low probability of winning** (14.1%) followed by the **substantial effort and financial cost required for participation** (11.5%) and **language barriers** (10.2%). Restraints in connection with physical distance to the location and unfamiliarity with specific country regulations ranked similarly (10.2 and 9%). These barriers underscore the challenging economic balance faced by these firms.

- Among multiple responses emitted by **men** living in Germany (592), the most frequently cited barrier was **language barriers** (12.5%), followed closely by the **substantial effort and financial cost required for participation** (12.3%). Other significant challenges included **unfamiliarity with specific country regulations** (11%) and the perceived low probability of winning (10.5%). Additionally, local-specific mindsets and challenges posed by language differences were reported at around 8%, highlighting difficulties in adapting to different cultural and regulatory contexts.

Barriers faced by practices located in Germany, disaggregated by firms' size:

- Among respondents from **unipersonal offices or practices** (326), the primary concern was the **inability to meet the required turnover threshold** (5.5 % of responses among pool of survey respondents), followed by the **substantial effort and financial cost required for participation** (4.9%), alongside language barriers, unfamiliarity with specific country regulations and the low probability of winning (4% each), showing difficulties in firms' economic structure.

- Among respondents from **3-5 people practices** (213), the primary barriers were the **substantial effort and financial cost required for participation** (9.9%) and the **low probability of winning** (8.9%). Additional challenges included unfamiliarity with specific country regulations and physical distance constraints (7.5% each), as well as language barriers and difficulties in meeting the required turnover threshold (7% each). These findings highlight structural economic challenges that smaller firms face when competing internationally.

- Among respondents from practices with **more than 30 people** (60), the most frequently cited barriers were **language barriers**, the **low probability of winning**, and **fee differences between home and target markets** (15% each). These were followed by challenges related to local mindsets (11.7%) and the substantial effort and financial cost required for participation (10%). These findings suggest that even larger firms face significant obstacles related to language, financial feasibility, and adapting to different market conditions.

	Responses	% Responses over total resp.	% Size firms from ADC Map	Number of firms	% Responses over num. of firms
1P	326	32.6	66.5	25166	1.3
2P	168	16.8	15.5	5866	2.9
3-5P	213	21.3	12	4541	4.7
6-10P	129	12.9	4	1514	8.5
11-30P	104	10.4	1	378	27.5
31-50P	33	3.3	1	378	15.9
>50P	27	2.7			
Total	1000	100.0	100	37844	2.6

Figure 5.64: Q 5.2 Germany: Responses by size of firm.

Germany: survey female/male respondents' barriers by size of firm

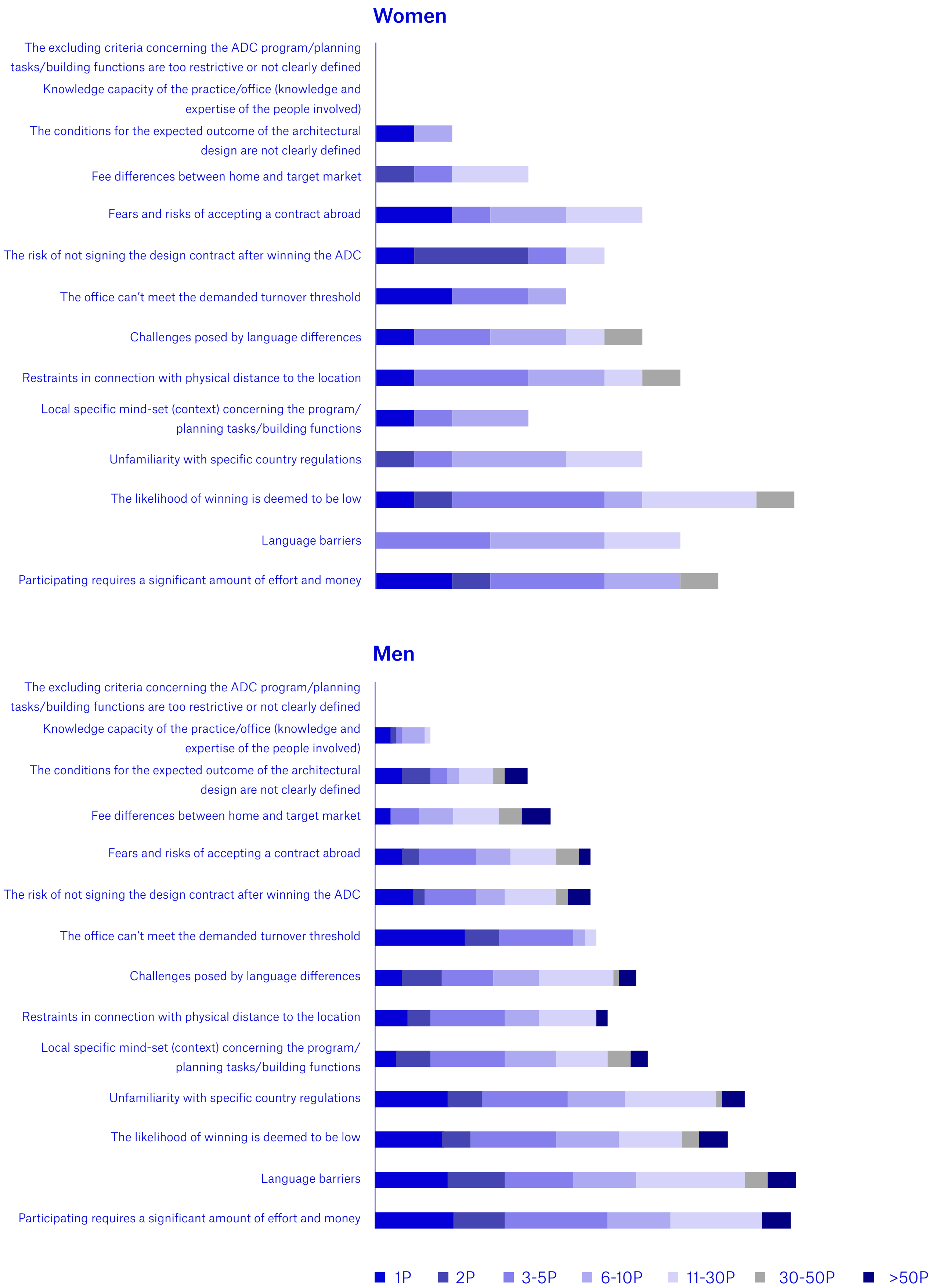


Figure 5.65: Q 5.2 Germany: survey female/male respondents' barriers by size of firm.

Germany: survey respondents' barriers by size of firm

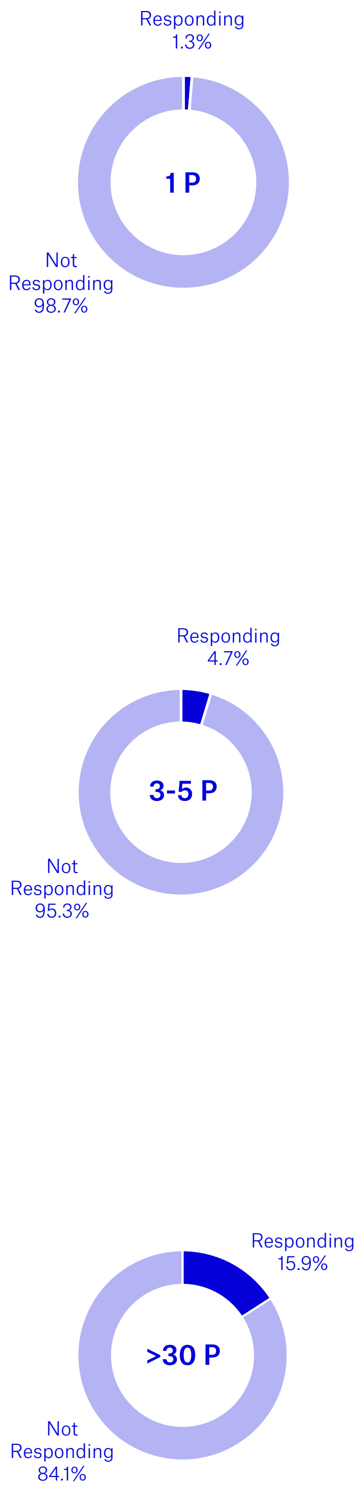


Figure 5.66: Q 5.2 Germany: Percentage of firms 1P/3-5P/>30P responding survey from pool of firms of this size.

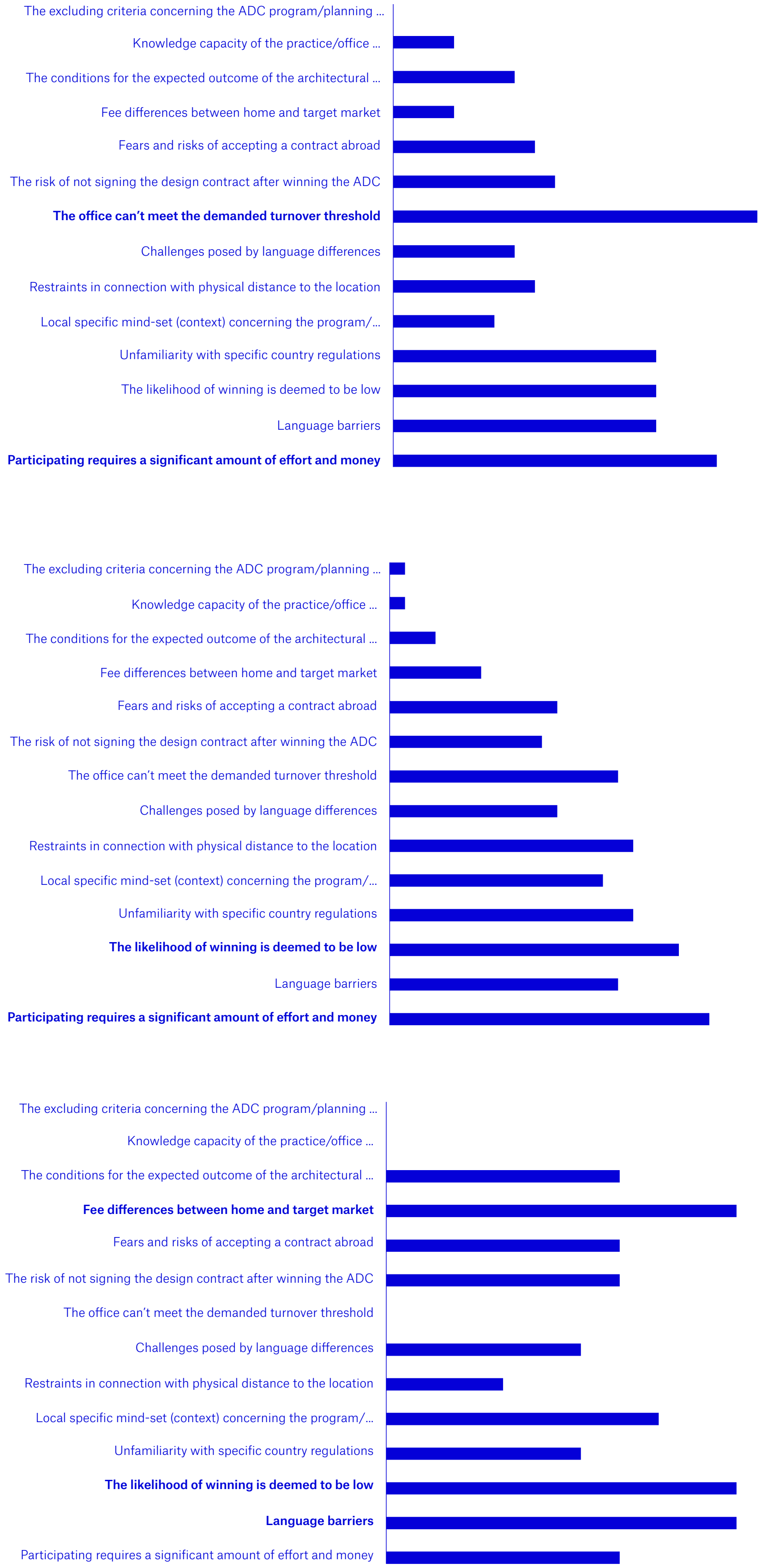


Figure 5.67: Q 5.2 Germany: % of barriers for offices 1P/3-5P/>30P in relation to the pool of responses by firm size.

CROATIA

Barriers faced by individuals residing in Croatia, in general:

- The most frequently cited challenge is the **substantial effort and financial cost required for participation (**15.3%). The **likelihood of winning** is also a major concern (13.6%), suggesting that many architects perceive these competitions as highly competitive with uncertain returns.
- **Language barriers** (11.9%) and local-specific mindsets regarding planning and design functions (11.9%) further complicate participation, making adaptation to different cultural and regulatory contexts difficult. Unfamiliarity with specific country regulations (8.5%) and physical distance restraints (8.5%) add to the logistical and administrative challenges.
- Additional concerns include **difficulties meeting turnover thresholds** (3.4%), the risk of not securing a design contract even after winning (5.1%), and fears associated with accepting contracts abroad (1.7%). Fee differences between home and target markets (1.7%) also pose financial uncertainties. The exclusion criteria for competitions and unclear expectations regarding design outcomes (8.5%) create further obstacles, limiting access and increasing uncertainty.

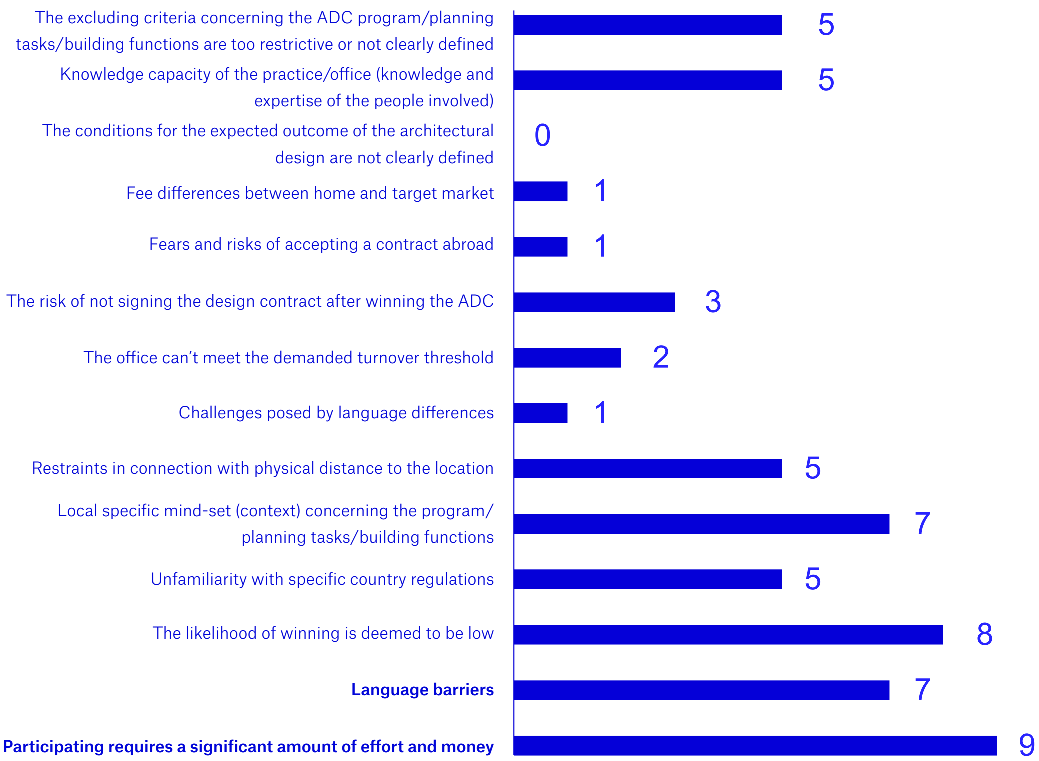


Figure 5.68: Q 5.2 Croatia: All respondents barriers (value).

Barriers faced by individuals residing in Croatia disaggregated by sex at birth:

- Among multiple responses emitted by **women** living in Croatia (31), the highest-ranked barrier (comparison only among responses by women respondents in Croatia) was the **substantial effort and financial cost required for participation** (19.4%), followed by the **local specific mind-set** (16.1%). Additionally, the **low probability of winning** and **language barriers** (12.9% each) are meaningful barriers.

- Among multiple responses emitted by **men** living in Croatia (28), the most frequently cited issue is the **substantial effort and financial cost required for participation** (19.4%), followed closely by **language barriers** (12.9%). Additionally, the **low likelihood of winning** (14.3%), **unfamiliarity with specific country regulations** (9.7%) and **local-specific mindsets regarding planning and architectural functions** (16.1%) emerging as significant obstacles. Additionally, **logistical challenges such as physical distance restraints** (9.7%) create further complications.

Barriers faced by practices located in Croatia, disaggregated by firms' size:

- Among respondents from **unipersonal offices or practices** (23), the primary concern was the **substantial effort and financial cost required** (13.0%) and the **low probability of winning** (13.0%), which discourage firms from investing in such opportunities. **Unfamiliarity with specific country regulations** (8.7%) and **limited knowledge capacity within firms** (8.7%) further hinder engagement. Additional challenges, such as local-specific mindsets, physical distance constraints, and restrictive competition criteria (4.3% each), create further obstacles.

- Among respondents from **3-5 people practices** (17), the primary barriers were **language barriers** (29.4%), followed by the **low likelihood of winning** (23.5%). Financial constraints, including the **substantial effort and cost required** (17.6%), and adapting to **local-specific mindsets** (17.6%) and **unfamiliarity with country regulations** (11.8%) create further obstacles. Other notable concerns include physical distance restraints (11.8%), limited knowledge capacity within firms (11.8%), and restrictive competition criteria (11.8%).

	Responses	% Responses over total resp.	% Size firms from ADC Map	Number of firms	% Responses over num. of firms
1P	23	32.9	60.75	549	4.2
2P	11	15.7	13.5	122	9.0
3-5P	17	24.3	18.5	167	10.2
6-10P	14	20.0	5	45	31.0
11-30P	3	4.3	1.5	14	22.1
31-50P	0	0.0	0.75	7	29.5
>50P	2	2.9			
Total	70	100.0	100	903	7.8

Figure 5.69: Q 5.2 Croatia: Responses by size of firm.

Croatia: survey female/male respondents’ barriers by size of firm

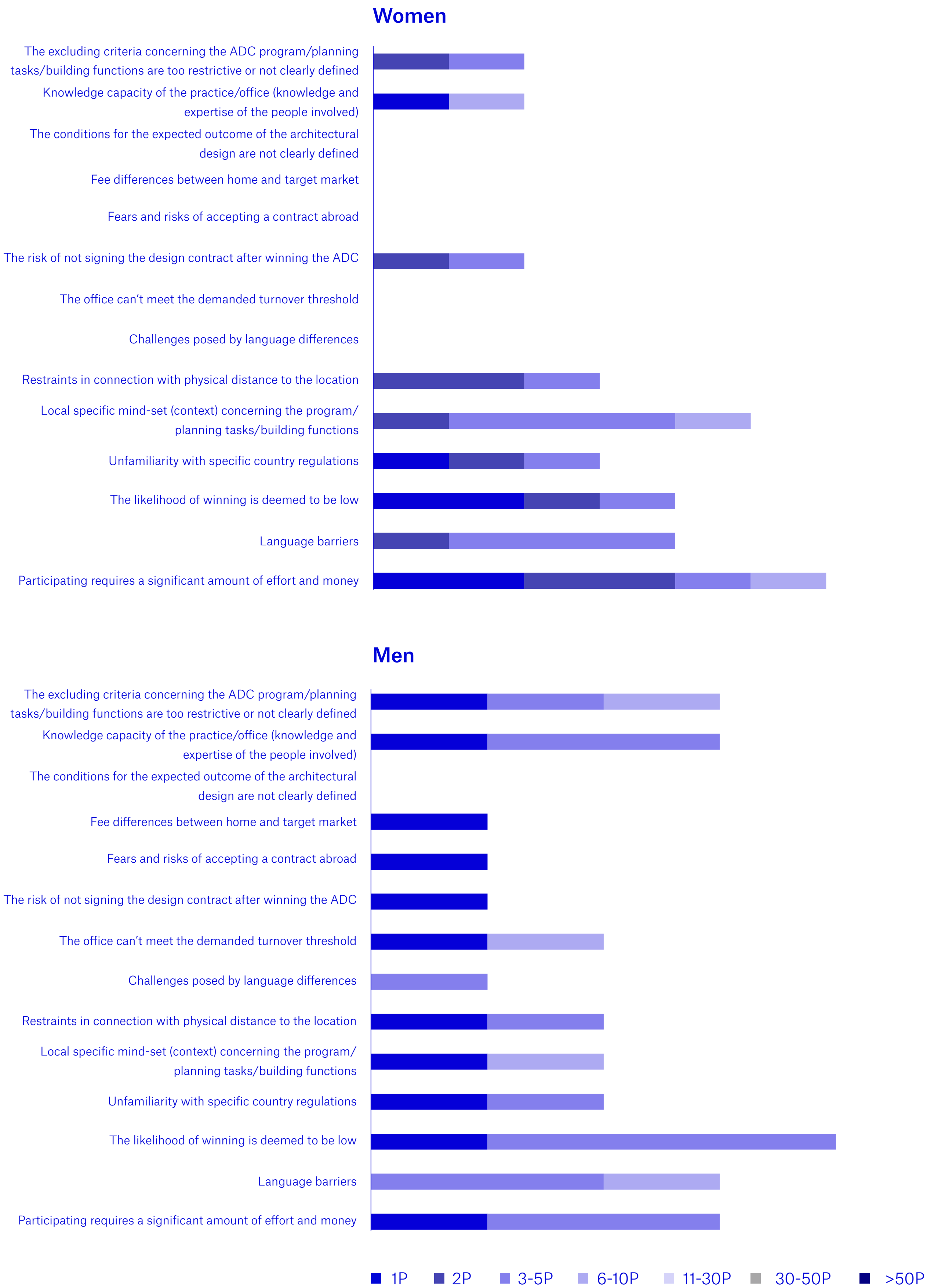
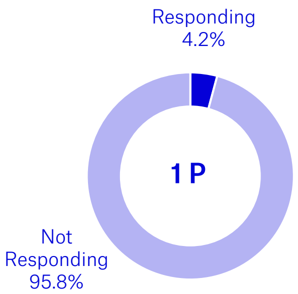
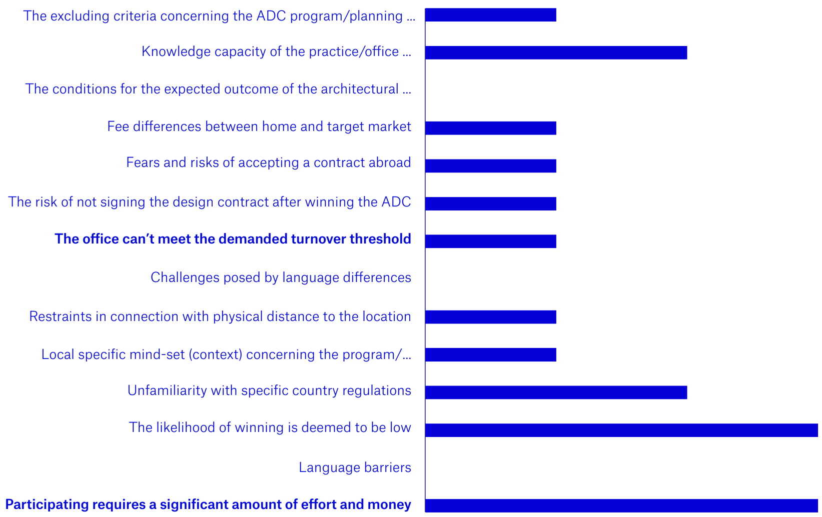


Figure 5.70: Q 5.2 Croatia: survey female/male respondents’ barriers by size of firm.

Croatia: survey respondents' barriers by size of firm





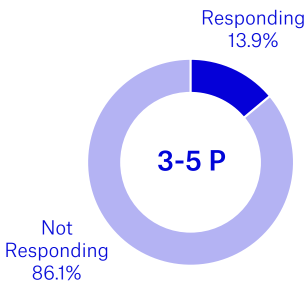


Figure 5.71: Q 5.2 Croatia: Percentage of firms 1P/3-5P responding survey from pool of firms of this size.

Figure 5.72: Q 5.2 Croatia: % of barriers for offices 1P/3-5P in relation to the pool of responses by firm size.

Key findings from Question Set 05 About your practice's experience when participating in an ADC abroad concerning KNOWLEDGE, SKILL GAPS and BARRIERS

Analysing all responses without disaggregation, the most cited barrier is **the substantial financial and effort investment required** (12.5%), making ADCs difficult to access for smaller firms. **Language barriers** (11.3%) and **unfamiliarity with country-specific regulations** (10%) create administrative and communication difficulties, while the perceived **low probability of winning** (9.8%) discourages firms due to uncertain returns.

Local-specific planning expectations (8.8%) and physical distance constraints (7.4%) add logistical challenges. Financial and contractual concerns also arise, with firms struggling to meet turnover thresholds (6.6%), fearing contract insecurity post-win (5.7%), and facing fee disparities (4.5%). Additionally, unclear competition guidelines (4%) and restrictive criteria (0.7%) highlight transparency issues, while 3.5% of firms feel underqualified.

Identifying country-specific barriers:

Austria: Unfamiliarity with country regulations (13.8%) and language barriers (13%) are the top concerns. Financial costs (10.9%) and adapting to local planning expectations (10.9%) also pose challenges. Gender-based differences show women rank financial constraints highest (21.2%), while men cite language barriers (15.2%). Firm size influences participation, with unipersonal practices struggling with turnover requirements (26.7%) and small firms (3-5 people) citing financial and regulatory issues (27.3%). Large firms (30+ people) primarily face language barriers and logistical constraints.

Germany: The most cited challenges are **financial constraints and language barriers** (12.3% each), followed by competition uncertainty and regulatory unfamiliarity (11%). Adapting to local planning contexts (7.8%) and physical distance (7.3%) add further difficulties. Gender-based data shows women rank competition uncertainty highest (14.1%), while men cite language barriers (12.5%) and financial costs (12.3%). Firm size plays a role, with unipersonal firms struggling with turnover thresholds (5.5%) and small firms (3-5 people) citing financial costs (9.9%). Large firms (30+ people) primarily face language barriers (15%) and financial feasibility concerns (10%).

Croatia: Financial constraints (15.3%) and competition uncertainty (13.6%) are the top challenges, followed by language barriers (11.9%) and adapting to local planning norms (11.9%). Regulatory unfamiliarity (8.5%) and logistical constraints (8.5%) add further obstacles. Women report financial barriers as the main concern (19.4%), while men cite financial costs (19.4%) and language barriers (12.9%). Among unipersonal firms, financial costs (13%) and competition uncertainty (13%) are key deterrents, while small firms (3-5 people) struggle primarily with language barriers (29.4%) and competition uncertainty (23.5%).

Across all three countries, financial constraints, language barriers, regulatory unfamiliarity, and competition uncertainty are the most significant barriers. Smaller firms struggle most with financial and regulatory requirements, while larger firms face language and logistical challenges.

5.5. Additional topics and international networking

International networking is a specifically defined research focus and a key objective of this study. It aims to examine the extent, nature, and impact of professional connections across borders, exploring how architects engage with international networks, collaborate on projects, and participate in global design competitions.

Nevertheless, it has no specific set of questions. It has strategically incorporated questions on internationalization within the broader framework of inquiries to provide a more nuanced and comprehensive understanding of its extent and impact. Rather than isolating internationalization as a standalone topic, it was embedded within the overall survey structure to analyse how it intersects with various aspects of architectural practice, including professional mobility, participation in international competitions, and cross-border collaborations. This approach ensures that internationalization is examined in context, allowing for a more holistic interpretation of its significance within the architectural field.

Additionally, during project partner meetings and questionnaire draft reviews, the need arose to explore **best practices** at each stage of project development—from competition to completion (Question Set 07). Discussions also highlighted the importance of determining whether **private clients** could effectively organize well-structured design competitions (Question Set 06), as well as assessing whether respondents perceived any **gender-related factors** affecting their participation in international ADCs (Question Set 09) also links this project to the previous EU-funded initiative, YesWePlan! which focused on promoting women in architecture and civil engineering. Led by the Austrian Chamber of Architects, this project involved several ARCH-E partners, reinforcing the continuity of efforts to address gender dynamics within the profession.

All these topics are closely linked to international networking, which is why they are addressed in advance to ensure a well-structured and informed approach.

Question set 06: Your opinion on PRIVATE CLIENTS launching ADCs, as a way to get better solutions for their design needs.

From the first meeting, during the discussions among ARCH-E consortium members, the idea emerged to ask respondents about their views on if private clients should (or should not) organize ADCs and if this would be meaningful for the profession. It was deemed valuable to gather insights directly from those who have participated in or attempted to participate in ADCs organized by private clients.

Therefore, a dedicated set of questions was proposed: **Question set 06: Your opinion on PRIVATE CLIENTS launching ADCs, as a way to get better solutions for their design needs.** These questions were specifically designed for architectural practices, offices, or cooperatives. If the respondent was part of a one-person practice, they answered based on their individual experience. In cases where the practice involved multiple members, responses were provided on behalf of the entire practice. **In this case, these responses only highlight possible future lines of inquiry.**

This set of question included 3 multiple-answer questions to be read. The most significant inputs from the questions in this set are summarized in the following paragraphs and pages.

Q 6.1

Should private clients be encouraged to launch an architectural design competition? (multiple answers possible)

This question offers **8 response options** (being Other one of these eight questions) and allowing multiple selections. Three are positive options and four are negative sided. Surprisingly, this question received a **high response rate**, with **1211 respondents** selecting a total of **4352 options**, averaging **3.6 choices per person**. This data has been analysed only globally.

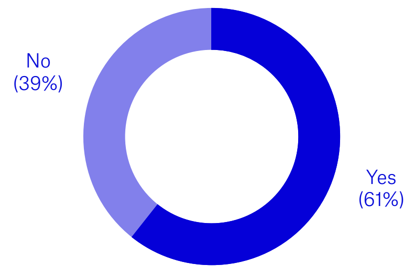


Figure 5.73: Q 6.1 All countries: ADCs by private clients, yes or not?

Parallel to the high interest of respondents for this question, the results of **Question 6.1**, exploring whether private clients should be encouraged to launch ADCs, reflect a mix of optimism and concern regarding the involvement of private clients in these competitions.

Most respondents (61%) support the idea, suggesting that ADCs initiated by private clients could bring positive changes. Among the key reasons, 525 respondents highlighted that private clients' ADCs have the potential to be **more flexible and innovative**, allowing for greater experimentation in architectural solutions. Another 432 respondents believed that encouraging private clients to launch ADCs would **increase the overall number of competitions**, potentially expanding opportunities for architects. Additionally, 361 respondents agreed with the general notion that **any ADC is better than no ADC**, reinforcing the importance of competitions as a procurement tool.

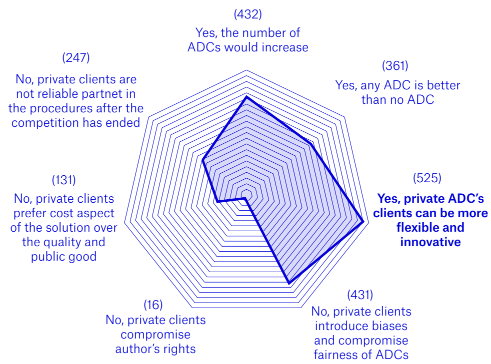


Figure 5.74: Q 6.1 All countries: Responses to Q 6.1

However, 39% of respondents expressed scepticism about private client-led ADCs, citing several concerns. A significant number, 431 respondents, argued that private clients tend to **introduce biases and compromise the fairness** of competitions, raising doubts about their transparency. Another concern was the reliability of private clients in handling post-competition procedures, with 247 respondents stating that **private clients are not dependable partners in the process once the competition ends**. Additionally, 131 respondents emphasized that private clients often **prioritize cost over quality and public interest**, potentially leading to lower design standards. More critically, a smaller group of 16 respondents raised concerns about **author's rights being compromised** in competitions organized by private clients.

The findings suggest a great engagement with this topic and a divided perspective among respondents. While many architects see private client-led ADCs as an opportunity for innovation and expansion, others remain cautious about their fairness, reliability, and impact on design quality. These insights highlight the need for clearer guidelines and safeguards if private clients are to play a more active role in architectural competitions.

Q 6.2

According to your practice's experience, what are the specific positive qualities of ADC when organized by private clients? (multiple answers possible)

This question offers **6 response options** (being Other one of these eight questions) and allowing multiple selections. Surprisingly, this question received a **lower response rate**, with **722 respondents** selecting 1413 options, an average of two options per respondent. This data has been analysed only globally.

The analysis of responses highlights several key qualities that respondents associate with **private clients' positive contributions** in architectural design competitions. One of the most valued attributes is engaging stakeholders early, with 283 respondents (20.1% of responses) emphasizing the importance of involving key actors at the initial stages of a project to ensure better alignment with expectations and project objectives. Additionally, thorough pre-competition research is seen as a crucial factor, cited by 266 respondents (18.9%), as it helps create well-informed and structured competition guidelines.

Another significant quality is the use of adaptive design briefs that provide updates, mentioned by 176 respondents (12.5%). This reflects the need for flexible and responsive project documentation that can accommodate new insights as the process evolves. Furthermore, more effective communication channels, highlighted by 199 respondents (14.1%), are seen as essential for fostering clear and transparent interactions between private clients and competition participants.

The ability to offer flexible timelines, when necessary, supported by 194 respondents (13.8% of responses), is another key factor that contributes to well-organized competitions, allowing adjustments in response to unforeseen challenges. Additionally, a considerable number of respondents (289) selected the "Other" category (20.5%), with an invitation to elaborate in the comments.

These findings, through the lens of desired private clients involvement, evidence the importance of early stakeholder engagement, thorough preparation, adaptive documentation, clear communication, and flexible scheduling, in order to significantly enhance the effectiveness and fairness of architectural design competitions.

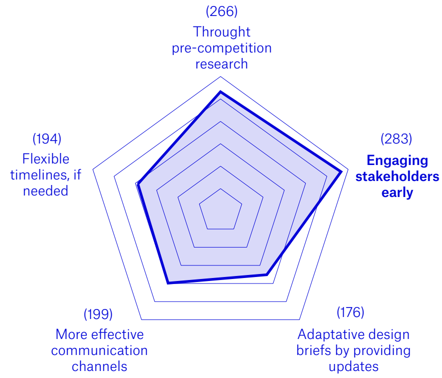


Figure 5.75: Q 6.2 All countries: Responses to Q 6.2

Q 6.3

In your practice's opinion, what potential benefits can private client's involvement bring to Architectural Design Competitions? (multiple answers possible)

This question offers **6 response options** (being Other one of these eight questions) and allowing multiple selections. Surprisingly, this question received a **medium response rate**, with **992 respondents** selecting 1413 options, an average of two options per respondent. This data has been analysed only globally.

The analysis of private clients' contributions to architectural design competitions highlights several key benefits. Increasing public interest and engagement in architectural design competitions emerges as the most frequently cited advantage, with 528 respondents (23.2%) recognizing its significance. Another notable benefit is the opportunity to showcase innovative designs in actual construction projects, reported by 495 respondents (21.7%). This suggests that competitions organized by private entities encourage greater innovation and allow for more flexible, open-ended design solutions.

The potential to foster collaboration between architects and private clients for long-term partnerships is another key finding, with 426 respondents (18.7%) acknowledging its importance. Such collaborations may lead to sustained professional relationships, enhancing mutual understanding between architects and private stakeholders while improving project outcomes over time. Access to additional funding and resources for competition projects, highlighted by 376 respondents (16.5%), underscores the financial benefits private clients bring to the table. Their involvement can lead to better-supported competitions, offering architects greater opportunities for professional development and project realization.

The introduction of real-world client perspectives and project requirements, cited by 267 respondents (11.7%), reflects the value of aligning design competitions with practical market needs. Private clients contribute by bringing firsthand industry knowledge and user-driven priorities, which can help shape competitions to be more relevant and applicable to actual development challenges. Lastly, 185 respondents (8.1%) provided additional insights through the "Other" category.

These responses emphasize the need for competition proposals that strike a balance between practicality and innovation, ensuring they are both grounded in the realities of construction and the market while remaining open to creative and forward-thinking design solutions. They also bring attention to the critical role of financial resources, highlighting how improved funding can enhance the feasibility, quality, and execution of architectural projects.

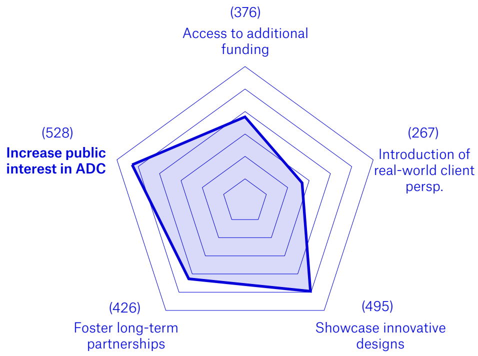


Figure 5.76: Q 6.3 All countries: Responses to Q 6.3

Key findings on Question Set 06: Your opinion on PRIVATE CLIENTS launching ADCs, as a way to get better solutions for their design needs

The findings of this analysis highlight the complex role of private clients in architectural design competitions, revealing both opportunities and challenges. The high level of engagement with these questions underscores the significance of this topic within the architectural community. While a majority support private-led ADCs for their potential to foster innovation, flexibility, and increased competition opportunities, others express concerns about transparency, fairness, and the risk of prioritizing cost over quality.

The results point to that these findings not only underscore the potential benefits of private client involvement in architectural design competitions but also highlight the **deficiencies respondents perceive in public ADCs**. The strong interest in private-led ADCs, particularly in terms of flexibility, innovation, and stakeholder engagement, suggests that many architects see limitations in how public competitions are currently structured and managed.

One key issue is the **rigidity of public ADCs**, which are often constrained by bureaucratic processes and strict regulations that leave little room for experimentation. Respondents' appreciation for **adaptive design briefs, flexible timelines, and more effective communication** implies that public competitions may lack the responsiveness needed to accommodate evolving project requirements or new insights.

Another notable deficiency appears to be **funding and financial sustainability**. The recognition of private clients as a source of additional resources suggests that architects may perceive public ADCs as underfunded, limiting the scope of competition opportunities and the feasibility of ambitious design solutions. The emphasis on **real-world client perspectives** also indicates that some public competitions might be disconnected from market realities, leading to projects that struggle to be implemented effectively.

Additionally, the interest in **long-term collaboration between architects and private clients** raises questions about the structure of public ADCs, which often operate in a more transactional manner without fostering lasting professional relationships. This could mean that public competitions do not always support continued engagement between architects and project stakeholders beyond the competition phase, potentially affecting the consistency and quality of project execution.

Ultimately, these findings suggest that **many architects responding this survey view private-led ADCs as an alternative model that addresses limitations in public competitions.** While public ADCs remain an essential part of the architectural landscape, the insights gathered here point to areas where they could improve—by adopting more flexible structures, securing better funding, strengthening communication, and fostering more sustained collaboration. If these deficiencies are addressed, public ADCs could become more effective and appealing while retaining their core values of transparency and fairness.

Question set 07: Best practices according to survey respondents

During the discussions among ARCH-E consortium members, the idea emerged to ask respondents about their views on best practices. While each partner had already contributed what they considered to be best practices, it was deemed valuable to gather insights directly from those who have participated in or attempted to participate in international ADCs.

Therefore, a dedicated set of questions was proposed: **Question Set 07: According to your practice's experience, identify the best examples in ADCs within or outside your home country**. These questions were specifically designed for architectural practices, offices, or cooperatives. If the respondent was part of a one-person practice, they answered based on their individual experience. In cases where the practice involved multiple members, responses were provided on behalf of the entire practice. **In this case, these responses have to be considered as individual comments by respondents and only highlight possible future lines of inquiry.**

This set of question included 4 open questions to be read. The most significant inputs from the questions in this set are summarized in the following paragraphs and pages.

Q 7.1

In your practice's experience, what have been the most transparent and fair ADC that you have participated in or are aware of? Please, we kindly ask you to provide the ADC name, explain briefly the choice, and add a reference link to support the decision. Thanks in advance.

Several competitions stood out for their transparency and fair assessment processes. **Swiss competitions were consistently cited for their structured and impartial procedures**, ensuring an objective evaluation of submissions. Similarly, the **Mauren Kindergarten Competition in Liechtenstein** was praised for its clear jury report explaining the selection process of the winning team. Competitions in **Vorarlberg**, **Austria**, were also highlighted for limiting submissions, reducing excessive costs for participants, and maintaining consistent jury criteria. Other noteworthy examples include the **HTL Goethestraße Linz competition in Austria**, which was considered fair in its assessment, and the **Saint-Gobain Architecture Student Contest**, which provided a detailed plan and structured evaluation criteria. Additionally, **EUROPAN** competitions were mentioned as maintaining high transparency across multiple European countries.

Q 7.2

In your practice's experience, which have been the best-regulated ADCs you have been involved in or are aware of? Please, we kindly ask you to provide the ADC name, explain briefly the choice, and add a reference link to support the decision. Thanks in advance.

Regulation plays a critical role in ensuring the integrity of ADCs. **Switzerland** was widely recognized for its well-defined competition rules, minimal bureaucratic hurdles, and clear expectations. **Competitions in Austria, particularly those organized by BIG (Bundesimmobiliengesellschaft)**, were cited for their well-structured frameworks, balancing regulation with accessibility. **Kramsach Primary School Competition** in **Austria** was noted for its local partner-based assessment approach, while **Saint-Gobain Architecture Student Contest** was praised for offering both local and international competition experiences with detailed participation guidelines. The **Bundek Theme Park Competition** was also referenced as a well-documented and effectively regulated competition. Additionally, competitions registered with the **German Chambers of Architects under RPW guidelines** were recognized as some of the best-regulated processes in Germany.

Q 7.3

In your practice's experience, which has been the best experience of post ADC process from WINNING the ADC to SIGNING the contract for designing the project?

Securing a contract after winning an ADC is a decisive step that often determines the competition's real impact. Several competitions were highlighted for their smooth and professional handling of this transition. The **Kindergarten Mauren in Liechtenstein** was recognized for involving a dedicated municipal team to coordinate meetings with experts and stakeholders, facilitating a seamless transition. **Phyra Community Centre and Kindergarten** in **Austria** also demonstrated an effective post-competition process. Competitions conducted by **ARE Wohnbau Linz** in **Austria** were praised for their fair and professional handling of contract negotiations. **The City of Zurich competitions** stood out for their strong commitment to realizing winning projects. In **Germany, municipal competitions such as those in Haar and Hallbergmoos** were recognized for their constructive cooperation and transparent contract negotiations. Additionally, the **Steinwiesen Cultural Centre Competition** in **Germany** was cited as an example of a well-managed post-competition process.

Q 7.4

In your practice's experience, which has been the best experience of post ADC process from SIGNING the contract for designing the project to FINALIZING the construction of the building and why?

The transition from contract signing to finalizing construction is where many competitions encounter delays and complications. However, some ADCs were highlighted for their effectiveness in ensuring smooth project execution. The **Kindergarten Mauren in Liechtenstein** was again praised for its well-organized approach, maintaining close coordination between stakeholders throughout the project's realization. **Competitions in Switzerland, particularly in the City of Zurich**, were consistently recognized for their strong commitment to executing the awarded projects as planned. **Competitions run by the Austrian ZT Chamber** were noted for their structured and reliable follow-through, ensuring minimal deviations from the original competition proposals.

A notable mention was the **Richard Wagner School in Villach, Austria**, where all project documents were digitally available, and communication was efficient throughout the process. The **Big is Beautiful competition in Graz** was also praised for its relatively smooth transition from planning to building within five years. Furthermore, projects such as the **Helsinki New Museum of Architecture and Design** demonstrated strong project continuity, maintaining architectural integrity from competition to construction.

Key findings on Question Set 07: According to your practice's experience, identify the best examples in ADCs within or outside your home country

These best practices demonstrate the importance of well-structured, transparent, and regulated ADCs in ensuring fair competition, professional growth, and the successful realization of architectural projects. **Swiss and Austrian competitions emerged as exemplary models** in all categories, while select competitions in **Germany, Finland, and Liechtenstein** also provided outstanding examples of efficiency and fairness.

The ARCH-E survey responses indicate **a strong shared interest among German-speaking countries in architectural design competitions, which are widely recognized in these regions as a well-structured and effective tool for public procurement.**

Question set 09: Gender issues related to access to ADC

During the working meetings, emphasis was also placed on the opportunity to link this project to the initiatives established by the **EU-funded YesWePlan! project**. YesWePlan! highlighted that a significant majority of female architects work in **small offices**, while the ARCH-E project, in conjunction with ACE studies, confirms that most architectural firms in Europe have **fewer than five employees.** This overlap suggested the need to investigate whether **gender-related conditions or particularities** influence female architects' participation in or access to architectural design competitions.

Therefore, a dedicated set of questions was proposed: **Question set 09: Gender issues related to access to ADC**. These questions were specifically designed for architectural practices, offices, or cooperatives. If the respondent was part of a one-person practice, they answered based on their individual experience. In cases where the practice involved multiple members, responses were provided on behalf of the entire practice.

This Question set 09 comprised 4 closed questions varying in content and length, preceded by Question 8.5, which determined access to Question set 9. The most significant insights gathered from these questions are summarized in the following paragraphs and pages.

Q 8.1

Do you think gender issues have an impact on ADC accessibility and performance?

This question received a nearly full response, counting 1147, what in fact is in itself a response. In addition, responses reveal a strong tendency toward dismissing gender as a significant factor in ADC participation.

The data shows that **83.5% of total respondents do not see the point of gender issues impacting ADC**, a viewpoint that is especially dominant among **men, with 89.6% expressing this stance. In contrast, 68.5% of women share this perspective**, indicating that while most of both genders do not perceive gender as a factor, women are comparatively more likely to acknowledge its significance.

On the other hand, **14% of total respondents believe that gender issues do play a role in ADC accessibility and performance. This viewpoint is notably higher among women**, with 27.5% affirming this belief, compared to only 8.5% of men. This disparity suggests that women are more likely to recognize systemic barriers related to gender in ADC environments. These barriers could include structural biases, unequal opportunities, and cultural norms.

A small percentage of responses (2.4%) fell under the "other" category, while 11% of responses were unspecified or blank. The significant gender gap in perception implies that personal experiences may shape opinions on this issue. Women, who are more likely to encounter gender-related obstacles, are also more likely to acknowledge these challenges, while men, who may not directly experience these barriers, are less inclined to recognize their impact.

These findings and the rest of evidences from this survey data suggest the need for further discussions on gender inclusivity in ADC-related fields. While the majority does not perceive gender issues as influential, a substantial portion of women do, highlighting a potential disconnect in experiences and awareness.

Only those who answered “Yes, absolutely” (161) and “Other” (28) in Question 8.5 proceed to answer Question Set 09.

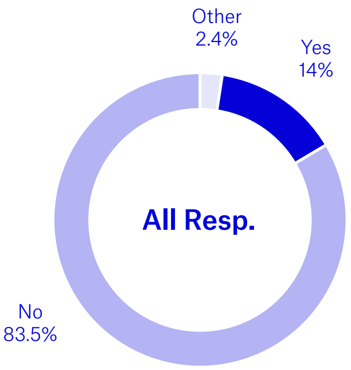


Figure 5.77: Q 8.5 All countries: All responses to Q 8.5 (percentage).

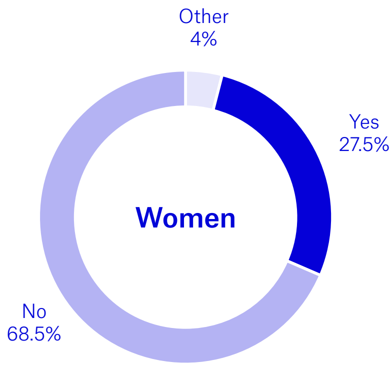


Figure 5.78: Q 8.5 All countries: Women responses to Q 8.5 (percentage).

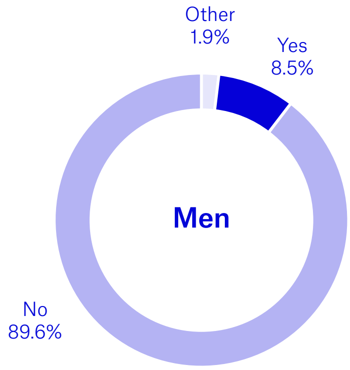
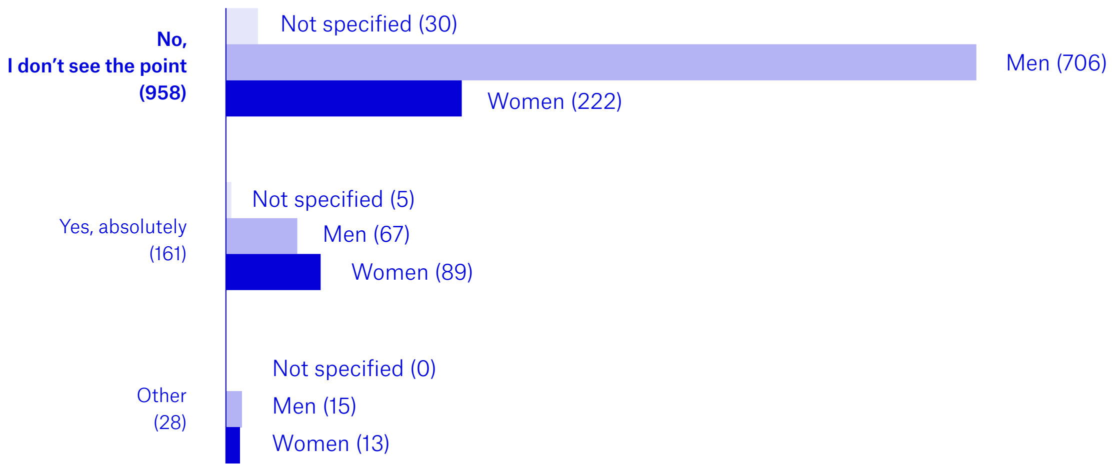


Figure 5.79: Q 8.5 All countries: Men responses to Q 8.5 (percentage).



Respondents who proceed to answer Question Set 09. (189)

	Women	% resp.	Men	% resp.	N.S.	% resp.	Total	% resp.
Other	13	4 %	15	1.9 %	0	0 %	28	2.4 %
Yes, absolutely	89	27.5 %	67	8.5 %	5	14.3 %	161	14 %
No, I don’t see the point	**222**	**68.5 %**	**706**	**89.6 %**	**30**	**85.7 %**	**958**	**83.5 %**
	324		788		35		1147	
Not specified/Blank	39		93		11		143	

Figure 5.80: Q 8.5 All countries: Responses to Q 8.5 (value).

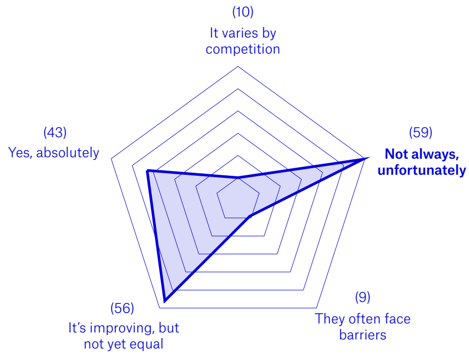
Q 9.1

Do you believe female architects can access Architectural Design Competitions on equal terms with their male colleagues?

This question received a full response in its context, counting 189 from possible 189. Analysis has been made without disaggregating data.

In this framework, a significant portion of respondents, **31.2%, believe that access is not always equal**, highlighting persistent gender disparities in access to ADCs. Similarly, **29.6% acknowledge that while improvements have been made, true equality has not yet been achieved**. These perspectives suggest that despite advancements, structural and systemic barriers continue to impact female architects' participation in design competitions.

On the other hand, **22.8% of respondents believe that female architects do have equal access**, indicating that some perceive the industry as fair and inclusive. However, **a smaller group, 4.8%, expressed that women often face significant barriers**, reinforcing the notion that certain institutional and societal challenges still hinder equal participation. Additionally, **5.3% of respondents noted that accessibility varies depending on the specific competition**, suggesting that some competitions may have more inclusive policies while others remain less accommodating. A small percentage, 6.3%, provided responses categorized as "Other," possibly reflecting mixed or nuanced views on the issue. While some individuals believe opportunities are equal, a considerable number acknowledge the need for further reforms and greater inclusivity.



Other	12	6.3 %
It varies by competition	10	5.3 %
Not always, unfortunately	**59**	**31.2 %**
They often face barriers	9	4.8 %
It's improving, but not yet equal	**56**	**29.6 %**
Yes, absolutely	43	22.8 %
Total	**189**	

Figure 5.81: Q 9.1 All countries: Responses to Q 9.1

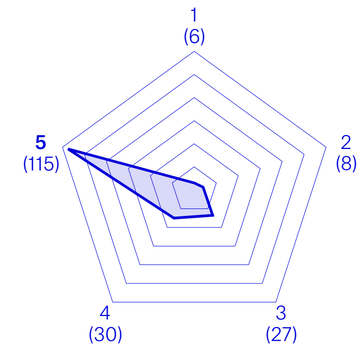
Q 9.2

Do you believe it is necessary to advocate for much fairer treatment regarding capacity and criteria of eligibility that do not hinder small offices/MSMEs (often owned by women) from participating in Architectural Design Competitions? (1, being "Not necessary"/ 5 "Very necessary")

This question received a nearly a full response in its context, counting 186 from possible 189. Analysis has been made without disaggregating data.

In this framework, with more women responding than men, a significant majority, **61.8% of respondents, rated this advocacy as "very necessary" (5)**, indicating that they recognize the existing barriers faced by small firms and believe in the urgency of creating fairer conditions. **Additionally, 16.1% of respondents selected a rating of 4**, further reinforcing the idea that more inclusive policies are needed to ensure equitable participation in design competitions.

While the majority agree on the necessity of reform, 14.5% of respondents chose a neutral stance (3), suggesting that some may see the issue as important but not necessarily urgent or in need of immediate intervention. A smaller group, 4.3%, selected 2, indicating that they do not consider fairer treatment of MSMEs and small offices to be a pressing concern. Only 3.2% of respondents chose 1, implying that a very small fraction believes that no changes are necessary in the existing competition criteria.



1	6	3.2 %
2	8	4.3 %
3	27	14.5 %
4	**30**	**16.1 %**
5	**115**	**61.8 %**
Total	**186**	

Figure 5.82: Q 9.2 All countries: Responses to Q 9.2

The data suggests that most participants recognize the structural challenges faced by small architectural firms, many of them owned by women, and see the need for reforms that provide more opportunities for these businesses. The high percentage of respondents advocating for fairer treatment indicates widespread awareness of the issue and a push for more inclusive procedures in ADCs.

Q 9.3

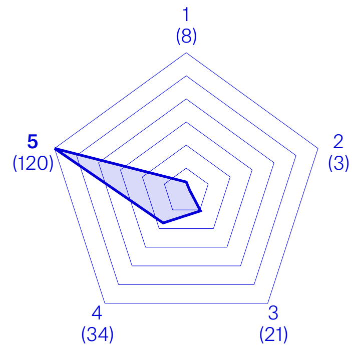
Do you think it's important to promote a gender-balanced composition of juries and other decision-making groups within the competition process? (1, being "Not important"/ 5 "Very important")

This question received a nearly a full response in its context, counting 186 from possible 189. Analysis has been made without disaggregating data.

In this framework, with more women responding than men, **a significant 64.5% of respondents rated this as "very important" (5) to promote a gender-balanced composition of juries and other decision-making groups within the competition process, demonstrating a widespread belief that balanced representation in decision-making processes can contribute to fairer and more inclusive outcomes.** Additionally, **18.3% of respondents selected a rating of 4, further reinforcing the notion that ensuring gender equity among juries and competition panels is an important aspect of fostering a just and unbiased evaluation process.**

A smaller percentage, 11.3%, remained neutral by selecting a rating of 3, indicating that while they may not strongly advocate for gender-balanced juries, they do not necessarily oppose the idea either. A minority of respondents, 1.6%, rated the importance as 2, and 4.3% considered it not important (1), suggesting that a small fraction of participants does not view gender composition as a meaningful factor in competition fairness.

These responses highlight a prevailing understanding that diverse representation in juries and decision-making bodies is essential to creating a level playing field in architectural competitions. The overwhelming support for gender balance suggests a growing awareness of the potential biases that can arise from homogeneous judging panels and the need to ensure that different perspectives are considered when evaluating architectural work.



1	8	4.3 %
2	3	1.6 %
3	21	11.3 %
4	**34**	**18.3 %**
5	**120**	**64.5 %**
Total	**186**	

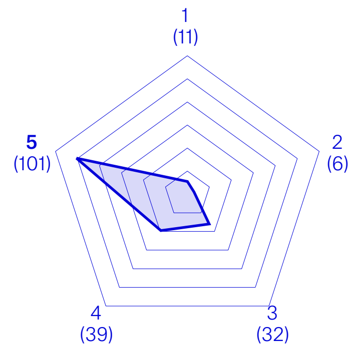
Figure 5.83: Q 9.3 All countries: Responses to Q 9.3

Q 9.4

How important do you believe professional networks are in supporting women when entering an architectural design competition (ADC)? (1, being "Not important"/ 5 "Very important")

This question received a nearly a full response in its context, counting 186 from possible 189. Analysis has been made without disaggregating data.

In this framework, with more women responding than men, a significant majority, **53.4% of respondents, rated the importance of professional networks as "very important" (5)**, indicating widespread recognition of the role that mentorship, industry connections, and support systems play



1	11	5.8 %
2	6	3.2 %
3	32	16.9 %
4	**39**	**20.6 %**
5	**101**	**53.4 %**
Total	**189**	

Figure 5.84: Q 9.4 All countries: Responses to Q 9.4

in fostering equal opportunities for women in architecture. **An additional 20.6% of participants selected a rating of 4, further emphasizing that professional networks** are regarded as crucial mechanisms for advancing gender equity and helping women navigate the competitive landscape of architectural design competitions.

A smaller proportion of respondents, 16.9%, remained neutral by selecting a rating of 3, suggesting that while they acknowledge the potential benefits of professional networks, they may not view them as an essential factor in supporting women. A minority of 3.2% rated the importance as 2, and 5.8% considered professional networks "not important" (1), reflecting the perspective that women's success in competitions may be more dependent on individual skill and merit rather than external support structures.

The overall trend in the data indicates that most respondents recognize the structural challenges women face in the field and see professional networks as key to mitigating these barriers. Most high ratings underscore a growing awareness of the role that collective professional support plays in fostering gender diversity and inclusivity in architectural competitions.

Key findings on Question Set 09: Gender issues related to access to ADC

The findings from Question Set 09 highlight varying perceptions of gender issues in Architectural Design Competitions (ADC). **While 83.5% of respondents (seen in general), particularly men (89.6% of men responding this set of questions), did not perceive gender as a barrier, a significant proportion of women (31.5% of women responding this set of questions) acknowledged systemic challenges that hinder their participation.** This disparity underscores the need for greater awareness to bridge the gap in experiences and opportunities.

Question 8.5 revealed that while many dismiss gender as a determining factor in ADC accessibility and performance, 27.5% of women responding this question identified structural biases, unequal opportunities, and cultural norms as obstacles, compared to only 8.5% of men responding this question. Question 9.1 further reinforced this reality, with 31.2% of respondents acknowledging that female architects do not always have equal access to competitions, and 29.6% believing that while progress has been made, true equality has not yet been achieved. Meanwhile, 22.8% stated that female architects do have equal access, but 4.8% still recognized significant barriers.

The necessity of fairer eligibility criteria for small offices and MSMEs, which are often owned by women, was strongly supported in Question 9.2. A majority of 61.8% rated this as “very necessary,” while 16.1% expressed strong support. Only a small fraction (3.2%) considered it unnecessary. Many respondents recognized that existing competition requirements disproportionately disadvantage smaller firms, calling for reforms to ensure equitable participation.

Question 9.3 emphasized the importance of gender-balanced juries and decision-making panels, with 64.5% rating it as “very important” and another 18.3% also supporting it. These responses indicate widespread agreement that diverse representation contributes to a fairer and more impartial evaluation process. Similarly, Question 9.4 highlighted the important role of professional networks, with 53.4% rating them as “very important” and 20.6% recognizing their significance.

Survey data shows that women are more likely to experience and acknowledge obstacles in accessing and performing national and international ADCs, while men tend to dismiss them. Respondents to this set of questions support that to create a more equitable ADC landscape, it is essential to implement inclusive eligibility policies, promote diverse juries, and strengthen professional support networks. These steps will help ensure that all architects, regardless of gender, have equal opportunities to compete and succeed.

Cross-Checking International Networking Responses

To assess the level of internationalization among architects participating in the survey while maintaining a concise questionnaire, it was decided that this aspect would be analysed based on responses to some specific questions. Additionally, further insights could be drawn from related data sources to enhance the analysis.

ARCH-E Survey questions underpinning the analysis on international networking:

Q 3.3 Has your practice ever taken part in an international ADC OUTSIDE your home country?

Q 3.5 If your response to Q3.3 was positive, please write the name of the country/countries, in which you participated in an ADC, in English in the field below.

Q 4.5 Did your practice collaborate with an established local practice in the country that launched the ADC DURING ITS PREPARATION? Please provide details in your comments (Q 4.12), including the country, the size of the local practice, and whether the experience was positive.

Q 4.6 Did your practice collaborate with an established local practice in the country that launched the ADC DURING ITS CONSTRUCTION period?

The analysis of the responses to these questions can be further enriched by incorporating the answers from **"Question Set 07: According to your practice's experience, identify the best examples in ADCs within or outside your home country"** as well as data from the ARCH-E map (Figure 1.5). This additional information will provide a more comprehensive understanding of the degree of internationalization among the participating architects.

From the responses to the survey question on participation in international competitions (**Question 3.3**), it is evident that engagement in such competitions is relatively low among respondents. Only 25% of those who completed the ARCH-E survey reported having participated in international competitions. Gender distribution within this group shows that 18% of female respondents and 27% of male respondents had taken part.

Regarding the list of countries where respondents have competed (see results of **Question 3.5**), the range is broad and diverse, covering all continents, albeit with varying levels of participation.

Additionally, among the offices that participated in international ADCs (**Questions 4.5 and 4.6**) when asked on local partners, only 40% indicated that they had collaborated with a local partner during the proposal development phase. Collaboration was even lower during the construction phase, with just 31% working with a local partner on the execution of the building or space in question.

From **Question Set 07 on Best Practices**, the responses suggest that knowledge of international best practices is primarily centred around German-speaking countries and the **EUROPAN competition,** which has a strong European focus. In other words, among survey respondents—most of whom reside in Germany—there is a clear preference for connections with countries that also speak or understand German. Additionally, the prominence of **EUROPAN** can be attributed to its significant support and promotion by European institutions.

From the analysis of architects' international mobility, presented in Figure 1.5: Map of Architects' International Connections, of **ARCH-E Map**, highlights significant differences in studying and working abroad among architects across Europe. The data, sourced from studies such as the ACE Sector Study and the ACE Observatory, reveals that studying abroad is consistently more common than working abroad in nearly all regions.

In Western Europe, France reports 25% of architects having studied abroad, but only 14% having worked abroad. In Central Europe, Germany presents a moderate trend with 21% having studied abroad and 8% having worked abroad, indicating some level of professional mobility. Switzerland follows a similar pattern, with 20% of architects studying abroad and just 4% working abroad. Meanwhile, Italy and Spain show similar trends, with 17% and 26% studying abroad, respectively, but only 14% and 6% working abroad.

Key findings on international networking

This analysis is based on selected survey responses from Question set 03 and 04, supported by data from Question Set 07 on Best Practices and the ARCH-E map (Figure 1.5). This pool of data by respondents reveals that participation in international competitions is relatively low, with only 25% of respondents having engaged, and gender distribution shows 18% of female respondents and 27% of male respondents involved. The countries where these architects have competed span all continents, though with varying levels of frequency.

Collaboration with local partners in international ADCs also appears limited, with only 40% of respondents working with local partners during the proposal phase and just 31% doing so during construction. This suggests a lower degree of cross-border collaboration, despite involvement in international projects.

Question Set 07 highlights that knowledge of international best practices is primarily centred on German-speaking countries and the EUROPAN competition, which enjoys strong institutional support across Europe. **Most respondents, primarily based in Germany, show a preference for connections with countries sharing linguistic or cultural ties.**

The ARCH-E Map (Figure 1.5) also indicates that studying abroad is more common than working abroad across Europe. For example, in Western Europe, France reports 25% of architects having studied abroad, but only 14% have worked abroad. Germany follows with 21% having studied abroad and 8% having worked abroad, while Switzerland shows a similar trend. In Southern Europe, both Italy and Spain exhibit a comparable pattern, with more architects studying abroad than working abroad. These trends suggest that while international education is widespread, professional mobility is more limited, likely due to licensing barriers and language challenges.

This analysis, alongside the examination of barriers, highlights a strong preference for a culturally and linguistically familiar environment, in this case, German-speaking countries. It also underscores the need to define a desirable threshold for international exchange, establishing clear objectives and the rationale behind them.

5.6. Support from ARCH-E project

Once the profile of the survey respondents and the main issues they raised were identified, the survey asked participants to evaluate how the ARCH-E project, along with local, national, and European Chambers of Architects, could support them. This section aimed to gather insights into the specific needs of architects and the role that these institutions could play in addressing the challenges faced by professionals in the field.

Therefore, Question set 08 asked **Architects' general requests to Chambers and ARCH-E project support to architects in their further professional development**. The questions were specifically directed at architects as individuals.

This set of question included 6 questions varying in content and length. The most significant results from the questions in this set are analysed in the following paragraphs and pages.

Q 8.1

How important is it for your practice to gain international recognition and exposure through participation in ADCs outside your home country?

This question received 1252 responses, making it a significant data point. A significant majority, **56.2% of respondents, rated the importance of international recognition as the lowest possible (1)**, suggesting that for most architects, international exposure is not a primary concern when engaging in competitions. **Additionally, 14.2% of respondents rated the importance as 2, reinforcing the idea that a substantial portion of the architectural community does not see international recognition as a key factor** in their professional development.

On the other hand, 14.7% provided a neutral rating of 3, indicating that while they do not completely disregard the value of international exposure, they do not see it as a top priority either. In contrast, only 6.9% of respondents assigned a rating of 4, and a mere 8.1% rated international recognition as very important (5). This small group suggests that some architects do see potential benefits in expanding their reach beyond their home countries, possibly in terms of business opportunities, reputation, or career advancement.

However, given the overwhelmingly low ratings, it is evident that most professionals prioritize other factors, such as project feasibility, financial sustainability, and fair competition conditions, over international visibility. **The overall trend in the data highlights a pragmatic approach among architects, where participation in ADCs is driven more by tangible and immediate professional concerns** rather than the pursuit of international acknowledgement.

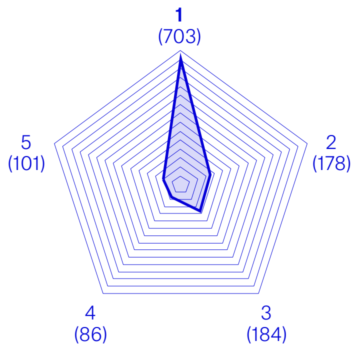


Figure 5.85: Q 8.1 All countries: Importance of gaining international recognition >> from 1 (low importance) to 5 (great importance).

Q 8.2

Prioritise the different requests to the Chambers/Associations/ Organisations of Architects to promote participation in the ADCs by...

1) ...facilitating training and education

This question was responded by 1024 people. The results show a mixed perspective, with some respondents emphasizing the importance of training while others downplay its relevance or believe that existing efforts are already sufficient.

Among the respondents, the largest group, representing **31.1% (318 participants), rated the necessity of facilitating training and education as "Not at all" important.** This suggests a significant portion of the architectural community does not consider additional training a priority for increasing participation in ADCs. **On the other hand, 30.0% (307 respondents) viewed training as "Helpful indeed"**, demonstrating a considerable level of support for educational initiatives that could enhance architects' preparedness for ADCs. **Another 27.4% (281 respondents) selected "Could be considered"** indicating that while they do not view training as essential, they recognize its potential benefits in certain contexts.

A smaller but notable group, 10.2% (104 respondents), rated training as "An absolute must," emphasizing the critical role that structured education, and professional development can play in enabling fairer and broader participation in ADCs. However, only 1.4% (14 respondents) felt that this objective "Is already achieved," suggesting that current training opportunities are either inadequate or not widely recognized. Additionally, 266 responses fell into the "Not specified" category, implying either uncertainty or disengagement with the question.

Overall, the data presents a divided perspective on the importance of training and education in the context of ADCs. While a significant proportion of respondents support the idea, a substantial percentage does not see it as a necessity.

8.2 Prioritise the different requests to the Chambers/ Associations/Organisations of Architects to promote participation in the ADCs by...	[... facilitating training and education]	[... providing networking opportunities]	[... promoting or encouraging the launching of all kinds of ADCs]
Not at all	318	158	161
Helpful indeed	307	432	382
Could be considered	281	282	244
An absolute must!	104	177	251
This is already achieved	14	9	16
Not specified	266	232	236

Figure 5.86: Q 8.2. All countries: Responses to Q 8.2 (value).

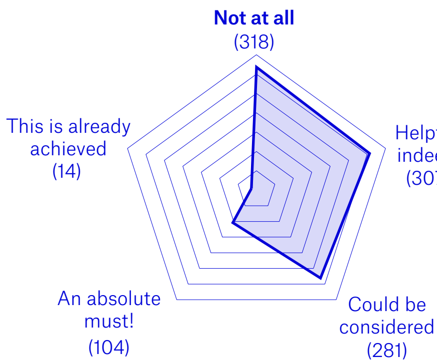


Figure 5.87: Q 8.2.1 All countries: Prioritise request to chambers to promote participation in the ADCs by facilitating training and education.

Q 8.2

Prioritise the different requests to the Chambers/Associations/ Organisations of Architects to promote participation in the ADCs by...

2) ...providing networking opportunities

This question was responded by 1058 people. The data suggests that many architects see networking as a valuable tool for career advancement and collaboration within the profession.

Among the respondents, **40.8% (432 participants) rated networking as "Helpful indeed,"** indicating widespread recognition of its potential benefits in fostering connections, knowledge-sharing, and access to opportunities. Additionally, **26.7% (282 respondents) selected "Could be considered,"** suggesting that while they acknowledge the value of networking, they may not view it as a primary concern or the most immediate solution to ADC-related challenges. **A significant portion, 16.7% (177 respondents), regarded networking opportunities as "An absolute must,"** underscoring the belief that professional connections are crucial for architects seeking greater visibility and success in the competitive landscape of design competitions.

On the other hand, 14.9% (158 respondents) rated networking as "Not at all" important, indicating a notable minority who either do not see networking as relevant to ADC participation or prioritize other forms of support. Meanwhile, only 0.9% (9 respondents) stated that this is "Already achieved".

The overall trend in the data reveals a strong demand for enhanced networking initiatives within the field. The fact that over half of respondents rated networking as either "Helpful indeed" or "An absolute must" suggests that many architects believe stronger professional connections could lead to better access to projects, increased collaboration, and improved participation in ADCs.

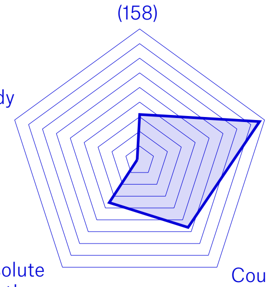


Figure 5.88: Q 8.2.2 All countries: Prioritise request to chambers to promote participation in the ADCs by providing networking opportunities.

Q 8.2

Prioritise the different requests to the Chambers/Associations/ Organisations of Architects to promote participation in the ADCs by...

3)...promoting or encouraging the launching of all kinds of ADCs

This question was responded by 1054 people. The data reflects a strong consensus that increasing the number and variety of competitions is an important area where institutions can play a role, although opinions vary on the level of urgency.

Among the respondents, **36.2% (382 participants) rated the promotion of ADCs as "Helpful indeed," showing a widespread belief that additional efforts in this area could be beneficial for architectural professionals. A significant portion, 23.8% (251 respondents), considered it "An absolute must,"** emphasizing the critical need for more competitions to provide opportunities for architects to showcase their work and compete on a broader scale. **Another 23.1% (244 respondents) stated that this "Could be considered,"** indicating that while they see potential benefits, they may not prioritize it as a top concern.

On the other hand, 15.3% (161 respondents) expressed that the promotion of ADCs was "Not at all" necessary, suggesting that they either do not see a shortage of competitions or believe that other structural issues within the competition system should take precedence. A very small fraction, 1.5% (16 respondents), believed that this is "Already achieved," implying that they find the current number and variety of competitions sufficient for professional growth.

The overall data suggests that while most respondents see the expansion of ADCs as beneficial, a significant portion prioritizes structural reforms over simply increasing the number of competitions. The responses highlight the importance of not only launching more ADCs but ensuring they are accessible, fairly structured, and inclusive to a wide range of professionals, including small firms and emerging architects.

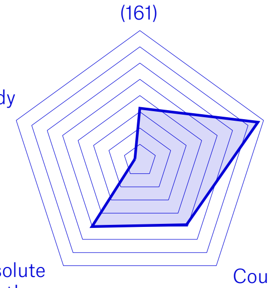


Figure 5.89: Q 8.2.3 All countries: Prioritise request to chambers to promote participation in the ADCs by promoting the launching of all kinds of ADCs.

Q 8.3

In what ways do you believe an international ADC web portal (such as ARCH-E) could support your further professional development? (multiple answers possible)

This question offers **6 response options** (being Other one of these eight questions) and allowing multiple selections. Surprisingly, this question received a **good response rate**, with **1029 respondents** selecting 2799 options, an average of 2.7 options per respondent. This data has been analysed only globally and related to the global pool of responses to question 8.3.

The data indicates a strong demand for initiatives that enhance networking, provide access to ADC systems across Europe, and increase professional visibility through recognition and exposure.

Among the 2.799 responses, **the most frequently selected area of support was providing a simple overview of ADC systems in other European countries, with 639 respondents (22.8%) identifying this as a priority**. This suggests that many architects find it challenging to navigate different competition structures across the EU and would benefit from clearer, more accessible information.

Networking and collaboration were also highly valued, with 625 respondents (22.3%) emphasizing the importance of facilitating connections with other architects and professionals. This indicates a strong interest in creating opportunities for knowledge-sharing, partnerships, and professional exchange, which could help architects expand their reach and improve their chances of participating in ADCs successfully.

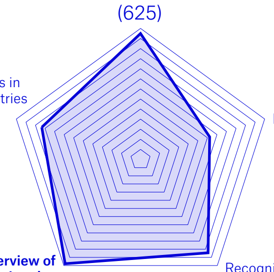
Recognition and exposure were another key area of interest, with 572 respondents (20.4%) highlighting the need for platforms that showcase architectural work and enhance visibility within the industry. This reflects the importance of gaining credibility and career advancement opportunities through increased exposure.

Finding ADCs in other EU countries, including access to briefs and relevant information, was selected by 517 respondents (18.5%). This indicates that many architects struggle with discovering and understanding competition opportunities beyond their national contexts, making it an area where ARCH-E could offer substantial support.

Skill enhancement, through project involvement and exposure to diverse design challenges, was selected by 362 respondents (12.9%). This shows that while training and skill development are considered important, they are ranked lower compared to networking, visibility, and access to information about ADCs.

Additionally, 84 respondents categorized their needs under "Other," suggesting additional areas for improvement that may require further exploration through qualitative feedback.

Overall, the data indicates that architects seek better access to information about ADCs, stronger professional networks, and increased visibility within the industry. **These findings suggest that initiatives by ARCH-E should focus on providing clear overviews of competition systems, fostering collaboration, and creating platforms for professional recognition, while also addressing the need for enhanced skills through practical exposure.**



	Value	% resp.
Networking and Collaboration: Facilitating connections with other architects an professio-nals to foster collaboration and knowlege sharing	**625**	**22.3 %**
Skill Enhancement: Offering opportunities to develop new skills or enhance existing ones through project involvement and exposure to diverse design challenges	362	12.9 %
Recognition and Exposure: Providing a platform to showcase your work and gain visibility and leading to potencial career opportunities and advancement	572	20.4 %
A simple overview of ADC systems in other European countries	**639**	**22.8 %**
Finding ADCs in other EU countries (and according briefs) easier	517	18.5 %
Other (Please elaborate in comments)	84	18.5 %

Figure 5.90: Q 8.3 All countries: How ARCH-E can support further professional development.

Key findings on Question Set 08: Architects' general requests to Chambers and ARCH-E project support to architects in their further professional development

The findings from Question Set 08 provide significant insights into the expectations of architects regarding the support they seek from ARCH-E and professional chambers at local, national, and European levels. The data highlights important areas of concern, including international recognition, training and education, networking, competition accessibility, and professional development opportunities.

A significant majority of respondents (56.2%) rated international recognition through ADCs as of low importance, indicating that architects prioritize immediate professional concerns such as project feasibility and fair competition conditions over global exposure. Only 8.1% considered international recognition very important, suggesting that while some architects see potential benefits, the majority focus on local and regional opportunities.

The need for facilitating training and education was met with mixed responses. While 30% found it helpful and 10.2% considered it an absolute necessity, a substantial 31.1% saw no need for additional training initiatives. These responses suggest that while some architects value training, others believe existing resources are sufficient or that other forms of support are more crucial for ADC participation.

Networking opportunities received stronger support, with 40.8% rating it as helpful and 16.7% as essential. Over half of the respondents expressed the belief that better professional connections could improve access to projects and collaboration in ADCs. However, 14.9% did not see networking as important, indicating that while there is broad support, a segment of architects either does not rely on networking or prioritizes other factors.

Expanding the availability of ADCs was another area where opinions varied. While 36.2% found the promotion of new competitions helpful and 23.8% viewed it as essential, 15.3% did not see the need for such efforts. A small percentage (1.5%) believed that the current number and variety of competitions are already sufficient. These responses suggest that while many architects support the idea of more competitions, structural improvements and accessibility remain higher priorities.

ARCH-E's potential role in professional development received strong engagement. The highest priority was creating an overview of ADC systems across Europe (22.8%), followed by networking and collaboration (22.3%), professional recognition and exposure (20.4%), and making it easier to find ADCs in other EU countries (18.5%). Skill enhancement through project involvement ranked lower at 12.9%, indicating that while training is valued, it is not as high a priority as visibility and accessibility.

Overall, the data suggests that architects seek improved access to ADC information, stronger professional networks, and increased visibility in the field. While opinions vary on training and competition expansion, there is clear demand for better-organized and more transparent ADC systems. These insights indicate that ARCH-E and architectural chambers can play a significant role in addressing these needs through targeted initiatives that enhance access, collaboration, and professional opportunities within the industry.

6
Concepts derived from the survey data

Concepts derived from the survey data

As mentioned at the beginning of this report, online surveys do not allow for the prior stratification of the target population (in this case, architects). As a result, their primary value lies in identifying trends, suggesting directions for further research, and offering general insights. To establish statistically robust conclusions, it is essential to first analyse the target population and segment respondents based on profiles relevant to the study. However, despite these limitations, the findings of an online survey remain valuable, as they provide meaningful indications and serve as a foundation for deeper analysis.

This online survey was launched in seven languages across all partner and cooperating countries. Its dissemination and outreach were managed by the Architects' Council of Europe (ACE), national chambers of architects, participating universities, and professional online media channels. Over a three-week response period, the survey received a total of 1,290 responses, with the majority coming from architects in Germany (77.8%), followed by Austria (5.7%), and geographically aligned countries such as Croatia (5.4%) and Slovenia (1.4%). These regions, therefore, provide the most consistent data sample. As noted in Section 4.1 of this report, these participation figures should be considered in relation to the total number of registered professionals eligible to respond in each country. This contextualization shifts the proportional engagement levels. Nevertheless, the absolute number of responses from each group remains significant and contributes to the overall impact of the survey findings.

Overall, most responses come from Germany (77.8%). Additionally, the survey data shows that most respondents are men (68%), primarily between the ages of 50 and 61 (34.6%). A significant portion (53.2%) have been running their practices for over 21 years, indicating that they are well-established professionals with clearly defined or firmly oriented career objectives. Their responses reflect not only their extensive experience but also the deeply ingrained personal and professional routines that shape their approach to the profession.

Within this framework, and considering the data collected along with its context, this analysis aims to address the central questions of Study 3 of the ARCH-E project. The goal for this section is to identify key insights that will help shape future research directions and potential areas for action.

Data will be commented in general (all countries) or by some countries with consistent data. Sometimes data is disaggregated by firm's size or sex at birth of respondent.

6.1. What kind of architects are interested in transnational ADCs?

The survey data reveals that only **25% of respondents have participated in an international ADC, while 69% have participated in national competitions.** This significant difference indicates that national competitions remain the preferred option for most architects.

Significant differences in international ADC participation rates appear across countries. **Austrian architects responding the survey show the highest engagement, with over 60% of respondents having participated in transnational ADCs**, whereas participation is significantly lower among architects responding from Germany and Croatia. These variations suggest that **interest in international competitions is influenced by a country's competition culture, institutional support, and access to information about foreign opportunities.**

The level of interest in international ADCs seems to be strongly influenced by perceptions of their benefits and the challenges they present.

Though respondents globally dismiss the gender issues in accessing ADCs, the survey data reveals a clear gender gap in participation rates. **Only 18% of female architects responding the survey have competed in an international ADC, compared to 27% of male architects.** This disparity suggests that **women face more obstacles in accessing international competitions**, possibly due to structural barriers such as lower firm revenues, fewer direct invitations, and cultural factors that hinder their presence in global markets.

Women-led architecture firms also report lower annual revenues. **Most firms led by women earn less than €50,000 per year**, while **firms led by men typically generate revenues ranging from €200,000 to €800,000**. This financial disparity directly impacts women's ability to afford participation in international ADCs, reinforcing the gender gap in these competitive environments.

Additionally, **men receive more direct invitations to participate in ADCs**, with **22% of male architects having been invited to a competition, compared to only 11% of female architects**. This suggests an inequality in access to high-profile opportunities, reinforcing the need for mechanisms that promote greater gender equity in the field.

The economic benefits of participating in international ADCs remain limited. Among those who have competed, **50.2% have done so only once in the last five years**, while **40.9% have participated between two and five times**. Success rates remain low, and even among winners, only **35% of women and 34% of men obtained a contract.**

Financially, **71% of respondents reported that their firms earned no revenue from contracts obtained through international ADCs**, and only **2% of firms stated that international ADCs accounted for more than 60%**

of their revenue. These findings confirm that **for most architecture firms, international ADCs do not significantly contribute to financial stability.**

The survey also evaluated the role of professional institutions in informing architects about ADCs. **National Chambers of Architects were the most common source of information, used by 35% of respondents**, followed by **social media (22.8%) and national procurement platforms (22%)**. While some national chambers, particularly in Austria and Germany, were seen as effective in disseminating ADC information, **the Architects' Council of Europe (ACE) had a less significant role.**

6.2. What knowledge, skill gaps and barriers have architects when participating in transnational ADCs?

While most architects can manage international ADCs, some are unfamiliar with country-specific regulations, competition structures, and best practices. The survey found that **13.8% of Austrian respondents and 10% globally struggle with foreign regulatory frameworks**, making it harder to meet local planning requirements. **Small firms and sole practitioners face the greatest challenges, as they often lack the legal and administrative resources to navigate these complexities**. Additionally, **8.5% of respondents in Croatia and 11% in Germany cited competition uncertainty as a challenge**, reflecting concerns about inconsistent rules and unclear evaluation criteria.

Another knowledge gap is related to **limited access to information about ADCs**. The survey found that architects rely primarily on their national Chambers of Architects (35%), social media (22.8%), and national procurement platforms (22%) to find out about ADCs. However, the lack of a unified platform for accessing all kind of ADC opportunities across Europe limits the ability of architects to explore international competitions effectively.

Language skills are one of the most significant skill gaps. **Language barriers were cited as a major obstacle by 13% of Austrian architects, 11.3% globally, and 12.9% of Croatian respondents.** The ability to communicate effectively in different languages is essential for navigating competition briefs, coordinating with local partners, and presenting proposals convincingly. The reliance on native-language competition documents further limits participation in foreign ADCs.

Another critical skill gap is the ability to **manage the financial and business aspects of ADC participation**. The survey revealed that **6.6% of respondents globally struggled to meet financial turnover thresholds**, while **5.7% worried about contract insecurity even after winning a competition.** These findings suggest that many architects lack the financial planning and contract negotiation skills needed to compete effectively in international markets.

Beyond knowledge and skills, architects face **multiple structural barriers** that limit their ability to engage in ADCs abroad. The most frequently cited obstacles include **financial constraints, competition uncertainty, and regulatory complexities.**

The **substantial effort and cost required for participation** was identified as the most common barrier, mentioned by **12.5% of respondents globally**. In Croatia, **19.4% of women and 19.4% of men ranked financial costs as their top concern**, while **21.2% of Austrian women architects also cited financial constraints as a major challenge**.

Smaller firms are disproportionately affected, as they often lack the financial reserves to invest in proposal development. Unipersonal practices reported the highest difficulty in meeting financial thresholds (26.7% in Austria), further limiting their ability to compete internationally.

Many architects perceive ADCs as **high-risk with limited chances of success**. The **low probability of winning** was cited as a major deterrent by **9.8% of respondents globally**. Additionally, even when architects win competitions, securing a contract to execute the project is not guaranteed. The survey found that among respondents who had won an ADC, **only 22% successfully obtained a contract afterward, 35% of women and 34% of men**. This lack of certainty discourages many professionals from investing resources in ADC participation.

The **bureaucratic burden** associated with international competitions was also highlighted by multiple respondents. A 61-70-year-old German architect described international market access as "virtually impossible" due to excessive bureaucracy, while another professional noted that "despite the official freedom of movement within Europe, actual market foreclosure is the rule". These responses underscore the complexity of navigating international ADCs, particularly for smaller firms with limited administrative capacity.

Physical distance also affects participation, as architects must balance ADC involvement with existing projects and firm operations. **7.4% of respondents cited logistical constraints** such as travel requirements, site visits, and coordination with local partners. This issue is particularly relevant for smaller firms, which may lack the resources to manage projects across multiple locations and but also because it is seen as an unsustainable issue by many respondents.

Collaboration with local partners is another challenge. **Only 40% of architects collaborated with local firms during the competition proposal phase, and just 31% maintained collaboration during the construction phase**. This suggests that while partnerships can be beneficial for overcoming logistical and regulatory barriers, they are not consistently utilized.

6.3. To what extent are architects internationally networked?

The level of international networking among architects varies significantly, with participation in cross-border Architectural Design Competitions (ADCs) and collaborations being **relatively low**. The survey data suggests that while international mobility and professional connections exist, they are often **limited by language barriers, financial constraints, and a preference for culturally familiar environments**.

Among those who have participated in international ADCs, **their involvement is sporadic rather than sustained**, as 50.2% reported competing only once in the past five years, while 40.9% had participated between two and five times. This indicates that while some architects engage in international competitions, it is not a primary aspect of their professional practice.

Networking opportunities through collaborations with local architectural firms are **not widely utilized**. Among those who participated in international ADCs, only **40% worked with a local partner during the competition proposal phase**, and this number dropped to **31% during the construction phase**. This suggests that many architects **attempt to compete independently** rather than forming alliances with local experts who could help them navigate regulatory, cultural, and logistical challenges.

The survey reveals a strong preference for networking within **linguistically and culturally familiar environments**. Many respondents indicated that their international professional ties are primarily with **German-speaking countries and EUROPAN competitions**, which are strongly supported at the European level. This pattern suggests that **architects are more likely to engage in international networking when there is minimal linguistic or procedural complexity**.

Despite the limited networking engagement, **survey respondents expressed a strong demand for more structured professional connections. Networking** plays a significant role in the professional development of architects, with **40.8% of respondents rating it as "Helpful indeed"**, indicating widespread recognition of its benefits. Additionally, **16.7% considered networking "An absolute must,"** emphasizing the importance of professional connections in accessing new opportunities. However, **14.9% of respondents did not view networking as important,** suggesting that some architects either do not rely on professional relationships or prioritize other forms of engagement.

When asked about **preferred markets for international ADC** participation, **59% of respondents selected "another EU country"** as their top choice, followed by **19.6% preferring "other European, non-EU countries"**. This reflects the **importance of regulatory and geographic proximity** in international networking, with European architects favouring cross-border collaboration within the EU due to **greater procedural alignment and mutual recognition of professional standards**.

Architects seeking international ADC opportunities tend to focus on socially and culturally impactful projects. The most frequently selected categories include educational facilities (12.3%), leisure and the arts (11%), public social housing (10.8%), and private housing (9.9%). This preference suggests that networking and collaboration efforts should prioritize fostering partnerships in socially driven architecture, a**ligning with architects' interests and promoting meaningful contributions to the built environment**.

While networking can enhance professional visibility, its financial impact remains minimal for most architects. Among those who participated in international ADCs, **71% earned no revenue from contracts secured through these competitions**, while **21% generated less than 15% of their firm's income from ADCs**. Only **2% of respondents reported that international ADCs contributed more than 60% of their revenue**. These findings confirm that international ADCs are rarely a stable source of income, highlighting the importance of networking as a means for firms to secure more reliable international projects through direct commissions or strategic partnerships.

6.4. How can the ARCH-E project support architects in Europe?

According to survey responses, ARCH-E can enhance support for architects through improving access to ADCs, strengthening networking opportunities, increasing professional visibility, refining competition structures, and providing targeted educational resources.

A **significant 22.8% of survey respondents identified the need for a clear and simple overview of ADC systems in other EU countries**, indicating that many architects struggle to navigate different national competition frameworks. Additionally, support in **finding ADCs in other EU countries, including access to briefs and relevant information, was a priority for 18.5% of respondents**. By streamlining information through a **dedicated international ADC portal,** ARCH-E can significantly **increase cross-border participation and reduce the uncertainty surrounding competition entry requirements.**

While some architects see value in gaining international recognition through ADCs, **56.2% of respondents rated it as the lowest priority**, suggesting that most professionals **focus more on local opportunities and feasibility over global exposure**. This highlights the need for ARCH-E to not only **promote ADCs internationally** but to **make them more accessible and relevant** to architects with different levels of experience and firm sizes.

Networking is seen as a central factor in professional development and competition success, yet international collaboration remains underutilized. **The survey revealed that 40.8% of respondents considered networking "helpful indeed," emphasizing its role in career advancement, while 16.7% saw it as an "absolute must**," recognizing that strong professional ties improve access to opportunities. However, only 40% of architects collaborated with a local partner during the competition proposal phase, and this number dropped to 31% during the construction phase. This suggests that international partnerships remain limited, making it difficult for architects to successfully engage in ADCs abroad. Proposed **ARCH-E NETWORK** might address this gap by developing a structured networking platform where architects can connect with potential collaborators, advisors, and project partners in different EU countries.

Though expressed in a contradictory way since in question 8.1 on how important gaining international visibility was for surveyed architects, 52.2% of architects responding survey rated the importance of this international recognition as the lowest possible, for many architects responding question 8.3 on how ARCH-E could better support them, gaining exposure through ADCs was marked as essential for career development. The survey found that 20.4% of respondents highlighted the need for platforms that showcase architectural work and improve industry visibility. This suggests that ARCH-E might promote initiatives that celebrate ADC winners, promote emerging talents, and enhance digital visibility for architects participating in competitions. A dedicated online portfolio platform showcasing ADC participants' work, like existing architecture award platforms, could help architects gain recognition beyond their national markets, contributing to cross-border career growth and professional credibility.

While expanding the number of ADCs is important, architects are more concerned with the quality and accessibility of competitions. The survey showed that 36.2% of respondents considered promoting ADCs "helpful indeed," while 23.8% saw launching new ADCs as an "absolute must." However, 15.3% did not see it as necessary, suggesting that structural reforms are a bigger priority than merely increasing the number of competitions. **As seen before, among the most common structural challenges are financial barriers, which make participation difficult for small firms and independent architects due to high costs and restrictive financial requirements. Bureaucratic complexities also present obstacles**, with 10% of respondents citing difficulties in understanding foreign regulations, making it harder to engage in competitions abroad. Additionally, only 35% of architects who win an ADC successfully secure a contract afterward, discouraging participation. **ARCH-E could support architects by advocating for fairer competition entry requirements and collaboration with national Chambers of Architects.**

The survey also revealed divided opinions on the necessity of additional training. While 31.1% of respondents saw no need for further education, 30% considered training "helpful indeed," and 10.2% viewed it as "an absolute must," highlighting the demand for specialized skill development programs. Language skills were another significant barrier, with 13% of Austrian architects and 11.3% of respondents overall struggling with foreign-language competition documents. **To support professional development, ARCH-E could offer multilingual ADC guidelines and other learning opportunities. Additionally, workshops on different legal frameworks** would further strengthen professional capabilities.

ARCH-E has the potential to bridge critical gaps in ADC accessibility, professional networking, and skill development across Europe. Furthermore, removing financial and bureaucratic barriers, advocating for fairer competition conditions, and increasing post-competition contract guarantees would make ADCs more attractive and viable for a diverse range of architectural firms, particularly small and emerging practices.

6.5. Analysing responses through core keywords

Faced with a complex territorial, economic, and cultural landscape, the ARCH-E research team recognized from its first in-person meeting in Ljubljana the importance of identifying a network of interconnected keywords to structure the study's findings. Given that no insight exists in isolation from its context, this approach aimed to create an integrated framework for analysis.

As a result of these discussions, a set of key terms or tags was established to characterize and contextualize the research findings. **The selected keywords—regulations, accessibility, quality, transparency, and stakeholders' perspectives—serve as reference points for interpreting the results.**

In this section, previously discussed findings will be briefly revisited through the lens of these key concepts, providing a structured and cohesive review of the study's main insights.

Most important 5 topics for ARCH-E project are...

Figure 6.1: Development of a cloud of relevant terms during the Ljubljana meeting.

Regulations

Architects expressed concerns about complex bureaucratic requirements, particularly those related to country-specific regulations. **A significant 10% of respondents cited unfamiliarity with foreign legal frameworks as a deterrent to international participation. Additionally, 6.6% of architects indicated that they could not meet the financial turnover requirements set by ADC clients.** Severe eligibility criteria, including references to previous projects of a similar scale, further restricted access for smaller firms and independent practitioners. These regulatory constraints disproportionately impacted architects limiting opportunities for cross-border competition and innovation.

Accessibility

Accessibility to ADCs remains a critical issue, with **financial and structural barriers preventing many architects from participating**. Only 25% of respondents had competed in an international ADC, while 69% had participated in national competitions, reflecting a preference for local opportunities. **The financial burden of ADCs was a primary concern, with 12.5% of respondents identifying the substantial investment required as a key obstacle. Language barriers were another limiting factor, with 11.3% of architects indicating difficulties in navigating competition documents and submission requirements**. Furthermore, physical distance (7.4%) and a perceived low probability of success (9.8%) discouraged many from engaging in ADCs abroad. Gender disparities also influenced accessibility, as only 18% of women had participated in international ADCs compared to 27% of men. Smaller firms, particularly those led by women, faced additional economic constraints that limited their ability to compete on an international scale.

Quality

The quality of ADCs, particularly **in terms of fairness and professional advancement**, was a recurring theme in the survey. While 36.2% of respondents found the promotion of new competitions helpful and 23.8% deemed it essential, a significant portion (23.1%) believed that increasing the number of ADCs alone would not resolve structural issues. **The quality of juries and evaluation processes also raised concerns**. Direct invitations to ADCs were more common for men (22%) than for women (11%), indicating a gender imbalance. Moreover, despite competition success, economic rewards were often minimal. Among respondents who won an ADC (17% of respondents), only 35% of women and 34% of men secured a contract afterward. The financial impact was limited, with 71% of firms reporting no revenue from international ADCs, and only 2% of firms generating more than 60% of their income from such competitions. These figures highlight concerns about the long-term viability and economic return of ADC participation, especially for smaller firms.

Transparency

Transparency in ADCs was a significant concern, **particularly regarding information dissemination and evaluation criteria**. Many architects relied on their national Chambers of Architects (35%) as their primary source of ADC information, followed by social media (22.8%) and national procurement platforms (22%). While some national chambers, such as those in Austria and Germany, were recognized for effectively distributing ADC-related information, the role of the Architects' Council of Europe (ACE) appeared to be less impactful. The low probability of winning and the uncertainty surrounding jury decisions were additional deterrents. Many respondents indicated that competition results often favoured well-established firms, leading to a perception of bias in the evaluation process. Calls for increased transparency included clearer competition criteria, more inclusive selection processes, and better public access to competition results.

Stakeholders' Perspectives

The perspectives of stakeholders, particularly private clients seen by surveyed architects, offer a significant finding from the ARCH-E survey that highlights the benefits of involving private clients in ADCs. One of the most frequently cited advantages is the potential for greater innovation and flexibility in design solutions, as private clients tend to have fewer bureaucratic constraints compared to public competitions. **This allows architects to explore more creative and unconventional approaches, aligning design proposals more closely with market realities and user needs**. Additionally, private-led ADCs often foster stronger collaboration between architects and clients, **leading to long-term professional relationships** that extend beyond the competition phase. Such partnerships enhance mutual understanding and result in more effective project implementation over time.

However, despite these advantages, private clients' involvement in ADCs also raises concerns among architects. Transparency and fairness are two critical issues that frequently emerge in discussions about private-led competitions. Many respondents expressed scepticism about whether private clients adhere to the same rigorous selection criteria and ethical standards as public ADCs. There are also concerns that private competitions may prioritize cost efficiency over design quality, potentially compromising architectural excellence. Furthermore, some architects perceive private clients as less reliable partners in managing the post-competition process, with uncertainties about contract fulfilment and project execution. These insights suggest that while private-led ADCs introduce new opportunities, they also require clearer regulatory frameworks and safeguards to ensure transparency, quality, and long-term project viability.

Global interpretation

The survey results indicate that regulatory complexities, financial constraints, and transparency issues significantly impact ADC accessibility. While architects recognize the value of ADCs, concerns about fairness, selection processes, and economic viability limit broader participation. **Strengthening competition quality, ensuring inclusive participation criteria, and improving access to information can enhance ADC engagement**. Addressing gender disparities and providing targeted support for small firms will be necessary in making ADCs more equitable. These findings offer a foundation for professional organizations and policymakers to implement reforms that foster a more accessible and sustainable ADC landscape across Europe.

7
Lessons learned

Lessons learned

Throughout this report, both the context in which the survey was conducted, and the various **Question Sets** have been analysed, allowing for the identification of specific **key findings**. These findings have also been discussed in previous sections, aiming to provide data-driven responses to the **core research questions** of this ARCH-E project.

This current section is dedicated to explicitly listing the **main findings and outlining some potential actions that could be derived from the data**.

7.1. List of lessons learned

Regulatory challenges: Complex bureaucratic requirements and country-specific regulations hinder international ADC participation. 10% of respondents cited unfamiliarity with foreign legal frameworks, and 6.6% reported being unable to meet financial turnover requirements.

Accessibility barriers: Only 25% of respondents participated in international ADCs, compared to 69% in national competitions. Financial constraints (12.5%), language barriers (11.3%), and perceived low success rates (9.8%) were major deterrents.

Gender disparities: Though it is not considered an issue to worry about by respondents, the reality is only 18% of female architects participated in international ADCs, compared to 27% of men. Men were also twice as likely to receive direct invitations (22% vs. 11%).

Financial viability: The economic benefits of ADCs were limited. 71% of firms reported earning no revenue from international ADCs, and only 2% of firms generated more than 60% of their income from such competitions.

Transparency issues: Many architects felt that ADC selection processes favoured well-established firms. National Chambers of Architects played a key role in providing ADC information, but the Architects' Council of Europe (ACE) was perceived as less impactful.

Private vs. public ADCs: Private-led ADCs were seen as more flexible and innovative but raised concerns about transparency and reliability. Public ADCs, though structured, were often bureaucratically rigid.

Post-competition issues: Winning an ADC did not always guarantee a contract. Only 35% of female (from 18% that took part in international ADC) and 34% of male (from 17% that took part in international ADC) winners secured a commission, highlighting the need for reforms.

Collaboration with local firms: While 40% (of around 35% of participants in international ADCs) collaborated during the proposal stage, only 31% did so during construction, indicating challenges in sustaining partnerships.

Training needs: 31.1% of respondents saw no need for further education, while 30% considered training “helpful indeed,” and 10.2% saw it as “an absolute must.” Language skills and legal knowledge were among the most significant gaps.

Best Practices in ADCs: Swiss and Austrian competitions were praised for their transparency and efficiency. Competitions in Zurich and Austria were highlighted as exemplary models.

7.2. From iconic challenges to Public Procurement: The changing role of ADCs

From the beginning of this project and throughout this phase of the study, there have been frequent references to the great architectural competitions of the past—from Otto Wagner’s Vienna Postal Savings Bank competition to those of Le Corbusier and Mies van der Rohe, as well as major French competitions such as the Centre Pompidou and Parc de la Villette, and international landmarks like the Sydney Opera House. **These competitions were aimed at highly ambitious, singular projects with large budgets and significant international impact. They were rare events, yet they provided participants—whether they won or not—with opportunities for global recognition.**

However, in pursuit of a more efficient and democratic administration within the European context, competitions have evolved beyond being occasional prestigious events. Instead, they have **become an integral mechanism of public procurement, with or without an architectural design project.** Each country, however, has adapted this threshold to its economic and societal needs, resulting in each country in significant differences.

Within this framework, **access to some public works contracts in most European countries is mediated through architectural design competitions** (or contests), which are no longer exceptional or heroic endeavours but a routine pathway to public commissions—funded by citizens, including architects themselves. Nevertheless, according to survey data, the bureaucratic and regulatory conditions governing these competitions remain largely inaccessible for small firms or those with less conventional profiles. **ADCs for public commissions have, in a way, become a routine aspect of architectural practice, effectively shaping the working conditions of architects.**

Yet, this survey **highlights a precarious landscape for architectural practices in Europe when it comes to public procurement, being ADCs one of its possibilities.** Small firms struggle with a lack of financial and structural resources, while medium and large firms face uncertainties in securing final contracts even after winning competitions. In addition, it should be considered that small firms tend to be more evenly distributed across the territory, being able to facilitate access to high-quality, thoughtful architecture in less populated areas and contributing to the broader dissemination of **Baukultur** and the **New European Bauhaus (NEB)** goals all over the territory through, precisely, the access to ADCs, national or international.

At the same time, the survey also reveals that **acceptance and positive perceptions of ADCs are highest where these processes are well-structured, effectively managed, and supported by national Chambers of Architects. This suggests that if international competition culture is to be promoted, these professional bodies should lead the process, ensuring tailored support mechanisms that address the unique challenges faced by different types of architectural practices.**

Many survey respondents also highlighted the importance of local engagement, cultural understanding, and supporting architects working within their own regions to foster sustainable outcomes and a strong sense of cultural belonging.

Finally, given that this report is released by members of the academic community, **the findings highlight a pressing need to integrate ADC knowledge into architectural education. Schools of Architecture should promote exemplary competition models and disseminate best practices related to regulations, accessibility, quality, transparency, and stakeholders' perspectives, ensuring that future architects are better prepared to navigate and succeed in the evolving ADC landscape.**

8
Annex

Annex

8.1. Survey questionnaire

The provided link leads to a copy of the complete survey; however, please note that the survey is now closed. The responses shown in the report are based solely on the data collected before the survey closed.

https://docs.google.com/forms/d/e/1FAIpQLScq9tz9DYbMmpRnQNTB94RzxoXfWQEC8rpeo3VvFAyoJTzKhA/viewform

ARCH E

ENGLISH ARCH-E Study 3: Architects' needs

ARCH-E is a project co-funded by the European Union under the Creative Europe framework (CREA) and its website can be accessed in https://www.arch-e.eu/

The main objective of Arch-E is to promote high-quality architectural solutions for the built environment by increasing the use of Architectural Design Competitions (ADC) in Europe and by helping architects to overcome cross-border barriers. In this framework, **ARCH-E is launching this online questionnaire** to find out the following:

- If and what kind of architects/practices are interested in participating in transnational ADCs.
- What knowledge and skill gaps they have in this regard.
- To what extent they are internationally networked.
- How the Arch-E project can support their further professional development.

This questionnaire is completely **ANONYMOUS** and the data will be used for statistical purposes only. It consists of ten short question sets and **takes approximately 12 minutes to complete. NO QUESTIONS ARE MANDATORY**, except for the country where the practice is located.

MANY THANKS YOU FOR TAKING THE TIME AND FOR SHARING YOUR EXPERIENCE WITH US!!

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Colophon
ARCH-E: Architects' Needs

ARCH-E project outputs addressed to research on Architects' Needs include:

- Study 3: Architects' Needs Survey, an online tool which involved the development, administration, and dissemination of a comprehensive questionnaire designed to explore the core questions of ARCH-E.
- Architects' Needs Report, an in-depth analysis of the data collected through the survey, providing key insights into architects' experiences and challenges in Architectural Design Competitions (ADCs).

Architects' Needs Survey

The Architects' Needs Survey was led by P8 UPV partner and conducted under the direction of Dr. Eva M. Álvarez Isidro, Dr. Carlos J. Gómez Alfonso, and researcher Diego Martín de Torres from the Universitat Politècnica de València, Spain. The survey questionnaire was collaboratively supervised by all ARCH-E partners and cooperation partners to ensure its alignment with the project's objectives and all of them contributed to its translation in partners' language and the dissemination of it in their countries.

Architects' Needs Report

The Architects' Needs Report analysing survey data and putting it into context was drafted by P8 UPV partner, with contributions as authors by Dr. Eva M. Álvarez Isidro, Dr. Carlos J. Gómez Alfonso and researchers Diego Martín de Torres, and Laura Iglesias Barras, all of them from the UPV Universitat Politècnica de València, Spain.

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