THE FUTURE FOR ARCHITECTS?

BUILDING FUTURES

RIBA

GLOBAL POPULATION GROWTH 2000-2050

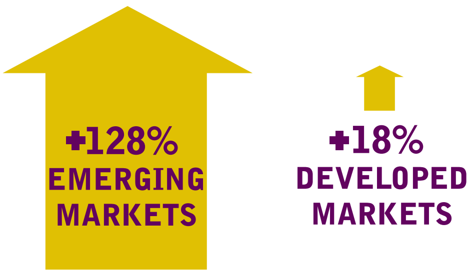
"IN 10 YEARS WE PROBABLY WILL NOT CALL OURSELVES AN ARCHITECTURE PRACTICE, IT WILL BE SOMETHING ELSE ENTIRELY."

ARCHITECT
Small metropolitan boutique practice

70%

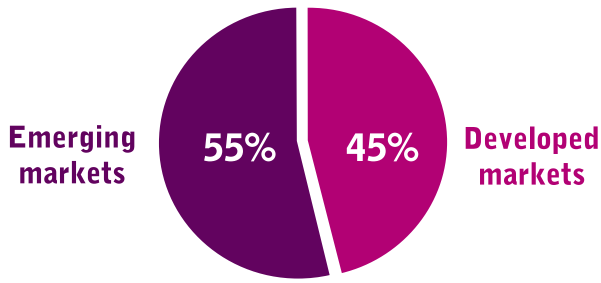
WILL LIVE IN URBAN AREAS BY 2050

INFRASTRUCTURE CONSTRUCTION GROWTH



2010 - 2020

SHARE OF GLOBAL CONSTRUCTION



BY 2020

MORE PEOPLE, BIGGER CITIES, MORE CONSTRUCTION...

Contents

Foreword

Dickon Robinson

Chair, Building Futures

Undertaking a study into the future of architectural practice in the depths of a recession, particularly a financially driven one such as we are currently experiencing, runs the risk that the views expressed by authors and contributors will have been unduly pessimistic. We have done our best to guard against this danger and kept our eyes firmly on the world we will be inhabiting in fifteen to twenty years time. And we have looked back that far and further to reflect on which trends are well established and to distinguish them from changes which may be little more than passing fashion.

The past fifteen years have been particularly interesting. The combination of lottery funding, Millennium euphoria and the global debt binge have been a great period for architecture. Our cities have seen radical change. Most now boast examples of exemplary contemporary architecture, and many have been transformed by architect designed residential towers and retail developments. For perhaps the first time the public perception of architecture has been informed by direct experience of well designed buildings large and small, and by the popularity of television programmes on architecture. Business for architects has been very good even if the quality has been uneven.

However, this burst of activity, and its consequent creation of an employment bubble, has tended to obscure the continuing changes in the construction industry that creates the context in which architects work. Architects are not alone in needing to respond to the impact of a globalising economy,

exploding information technology capability and cultural confusion. However in the face of a continuing erosion of traditional architectural skills to other players, the profession seems peculiarly vulnerable to a nostalgic backward glance at a bygone age in which the architect was the undisputed boss. Fortunately it is clear that many young graduates see nothing but opportunity in these extraordinary times. If they are to be fulfilled it is important that our professional institutions work to create the conditions which will optimise their chances. This report seeks to stimulate a discussion about the challenges and opportunities which architects in the broadest sense face in the hope that the ensuing debate will put them in the best position to succeed.

Introduction

This year, Building Futures set out to answer the tough questions that many professionals have been shy to acknowledge: who will design our built environment in 2025; what roles might those trained in architecture have then and how might architectural practice have changed as a result? For a profession that is time and again perceived as being insular and more focussed on what it can offer than what its client wants, the resulting speculations offer an opportunity for discussion, reflection and exploration of the imminent changes likely to affect the industry over the next fifteen years.

The study was initiated at the end of 2009 as an update to 'The Professional's Choice', published in 2003 by Building Futures and edited by Simon Foxell, which examined the future of the built environment professions. In addition, Bob White's 2005 report 'Constructive Change' has explored similar territory and both provide the background to this study. 'Constructive Change' identified a series of 'Future drivers for change' (see appendix), which on inspection five years later appear as relevant as they did then – with only changes in emphasis required to update them. The obvious addition, unforeseen at the time, is the impact of global recession, which has shifted considerably the landscape within which the architect must practice – exerting additional pressure on architects to demonstrate the value of good design. Equally, the financing of public sector projects through private/public collaborations continues to have a profound influence on the way buildings are procured and on who holds the control in the building process. All this has led to considerable flux in the profession and to the emergence of new and diverse forms of architectural practice.

Over the course of a year we have interviewed over forty individuals from across the built environment professions, with an aim to compare their long term views of the supply and demand side of the built environment industry. The study aims to examine the breadth of those who shape the built environment, encompassing those who have taken the traditional route through the profession and those who are working in expanded and experimental fields of practice, as well as those working elsewhere in the wider construction industry.

We began with a series of interviews with senior partners and directors from a range of architecture practices. They were asked to describe the vision for their practice over the next fifteen years, both idealised and realistic. In addition, the study looked at skills – asking what skills practices felt they would need to gain in order to compete over the coming years. The second part of the study gathered together key players from the demand side of the industry: clients, contractors, engineers, house builders, developers and integrated consultancies. The final group we spoke to were the future of the profession: students, graduates and young architects. We asked them where they hoped their future would lie, what type of practice they would like to work for and what stood in the way of them achieving that goal. Our findings were broad ranging and often contradictory.

This report consists of a summary from each of the groups (architects and designers, clients and consultants, students and graduates) that we spoke to, as well as some of the author's propositions for 2025 – which build on what the project team were told. The nature of this study is ongoing, and in a similar vein to previous Building Futures reports is speculative rather than definitive – generating scenarios, cautionary tales and alternative futures to stimulate discussion and debate rather than perfect answers. For a profession that has an unenviable reputation for being notoriously insular and more focussed on what it can offer than what its client wants, the resulting speculations should be an opportunity for discussion and interrogation – an exploration of the imminent changes likely to affect the industry over the next fifteen years.

Approach

The study aims to compare the long term views of both the supply and 'demand' side of the built environment industry. Within the supply side we had a clear aim to encompass a broad range of what Tatjana Schneider and Jeremy Till term 'spatial agencies' – practices and individuals whose work 'covers all aspects of spatial production' . These included those involved in the public realm, installation designers and strategists, as well as traditional practices, large global practices and highly specialist practitioners. The study is based on a four part methodology intended to provoke and inform debate rather than predict precise futures. That methodology includes:

- A limited interview sample;
- A series of invited roundtable discussions;
- Sightings – what we are observing around us;
- Insights of industry leaders, based on experience.

The first part of the study consisted of a series of interviews with senior members of a range of practices, conducted by Dickon Robinson, John Worthington, Karen Rogers and Claire Jamieson. We asked what the practices' idealised vision was over the next ten years, and how that differed from where they thought it would realistically be. Their business plans were interrogated (or lack thereof), as well as their practice structure; they were also asked to forecast where their workload would be coming from and what type of clients they will be working for in the next ten years. In addition, we were interested in skills – what skills practices felt they would need to gain in order to compete over the coming years and where would they look for their pool of talent. Practices were asked to consider where the most significant

opportunities lay for their businesses, as well as acknowledge the threats, we also asked them to consider the impact of cultural issues relating to globalisation such as mass immigration and the networked society.

The second part of the study took the form of a series of round table discussions which gathered together key players from the demand side of the industry: clients, contractors, engineers, house builders, developers and integrated consultancies. Through these facilitated discussion sessions we presented some of the key findings from the first part of the study in order to provoke a debate about the future of the industry – teasing out from the demand side a view of where they believe the path will lie. Their requirements from the built environment professions over the next ten years were scrutinized and juxtaposed with the future vision of the supply side of the profession.

Our final session looked to the next generation, assembling a mixed group of current students and recent graduates of architecture, engineering, quantity surveying, planning and urban design to discuss their hopes and fears for their professional futures. We presented them with findings from the previous phases of research – stimulating careful thought about where they might fit within this future, or more importantly how they might act to shape the future.

For a full list of the practices, organisations and individuals we spoke to, as well as the questions we asked, see the appendix.

1.0 What we were told by...

1.01 Architects and Designers

Sample: 13 architects/designers, ranging from the largest practice employing over 400 architects, to the smallest employing just 1; both global, European and UK based practices; 'traditional' architectural firms, sustainability specialists and public space interventionists.

What is an 'Architect'?

A key issue for many of the sole practitioners and smaller practices was the inflexible nature of the label 'architect', with many expressing a view that the title held their practice back in terms of the type of work they were able to do. One director described the term as a 'brand', dictating an assumption of what you will do, how you will do it and your behaviour. Some practices had taken the step of creating offshoot companies with a separate identity and different branding to their main practice that did not use the word 'architect', in order to reach more diverse markets. Those that had already or were considering broadening out the scope of their work, were branching into the areas of lighting design, product design, industrial design, interior design, installation design, branding and community consultation. One particular business, although founded by an architect, was now clearly branded as a multidisciplinary practice, doing very little traditional architecture. However, there was a contradiction to this view expressed by the smaller practices who were often conflicted in their feelings towards the term 'architect'. For them although the label 'architect' was restrictive in many ways, it was also enabling, and a necessary part of winning clients and getting onto the ladder.

Small practices

The smaller practices voiced a frustration at the restrictions placed on them in terms of the type and scale of project they were able to work on, yet

despite this most were also quite clear in stating that they would not wish to grow larger – based on issues of quality control and working environment. These types of practices also expressed a resistance to integrated technology such as BIM, with many describing the constant upgrading of technology as unsustainable for their size of practice. There was also a significant feeling that the more senior members of a small practice are increasingly pulling away from technology, relying on the younger members to keep up to date. One director voiced a concern over their practice's viability should they be stripped down to just the core directors, who in his words had been gradually deskilled.

Large practices

For larger practices technology is a more significant driver – and an essential tool required to compete. In one large practice, BIM technology formed an integral part of their design process – enabling each service to be integrated from day one of the concept design. One of the main ways that this size of practice keeps up to date is by constantly recruiting younger members of staff; for nearly all of the large practices we spoke to, active recruitment was an important issue. In this respect, one large practice described the loss of a generation of architects that could arise from this recession as a distinct threat to their practice. There was also a considerable awareness amongst this group of the threat from Asian nations with regards to technology and their incredible ability to stay ahead of the field. One large practice quoted the threat to keep up to date as a force that could, in the longer term future, give them cause to reduce their practice to a very small core with established links to a range of cutting edge consultants – working in a network in a more nimble manner.

Transferring skills abroad

Another key skill that was important for a lot of practices going forward was related to the ability to work effectively abroad – speaking a range of languages and learning particular customs. Larger practices overcome this issue by recruiting for foreign offices from local schools of architecture – establishing a talent pool for each office. However, a number of the small practices felt that their approach and ethos was so deeply ingrained in where they work now and notions of place identity, that working abroad did not seem like a viable option.

1.0 What we were told by...

1.02 Clients and Consultants

Sample: 15 representatives from large, medium and small clients, house builders, cost consultants, engineers, global interdisciplinary consultancies and project managers.

The role of the Architect

The vast majority of the demand side of the profession that we spoke to could see design slipping further down the pecking order in the next fifteen years. They justified this on the basis that building technology is becoming increasingly more complex, so much so that design work is increasingly being carried out by subcontractors. The concept of the architect as a technician who composes all the constituent parts of a building that are designed by the subcontractors was widely thought to be a realistic vision of the future. The demand side saw the role of the architect as still important, but as more of a coordinator/manager role, bringing all the parts of the team together. However, they questioned whether this was a role that the contemporary architect would want to do: in their view, it is a role typically taken by the engineer. There was a strong feeling that architects should be learning management skills earlier in the education process, so that they might begin to take these roles on more often. A number of individuals suggested that architects would be best placed to move into new fields of strategic consulting at higher levels, than to try to take back ground that has already been lost.

Architects on the demand side

There was a strong feeling amongst all the professionals on the demand side of the table that the architect's training was extremely well suited to higher

– level management positions within broader parts of the built environment profession. Within the group of clients and consultants, a large portion of them were qualified architects who had moved to the demand side of the profession and were thriving. It was felt that there was a gap for architects to take advantage of in the realm of 'interdisciplinary leadership' – embracing their skills and putting them to use in senior positions within construction firms or as clients, developers or policy makers. However there was also agreement that the architectural profession unfortunately does not view itself as part of the wider construction industry, and that this was a fundamental value that needs to change.

Risk

Another reason cited for architects slipping down the pecking order is the increasingly risk averse approach taken by clients, particularly within the public sector in the UK. This aversion has seen the steady rise of PFI and other one-stop-shop commissions where the people who deliver projects – i.e. contractors – are put in the driving seat rather than the architects who simply provide the design. It was felt that the large multidisciplinary global practices – often engineering or contractor led – that we see emerging now are likely to be even more prevalent in fifteen years time because they are able to carry the risk on behalf of the client. Tied into this was the requirement for BIM, which ensured the highest level of liability cover and thus the ability to take on that risk. There was considerable agreement that whoever carried the risk would drive the design, and so in shying away from taking on risk architects are diminishing their ability to influence design outcomes.

Emerging markets

The emerging markets were an area that many in the demand side were excited about, and many were keen to be global service providers. There was a suggestion that design was not at the forefront of the agenda in less mature markets and so this arena was best suited to the large multidisciplinary global consultancies whose one-stop-shop approach could provide an efficient, cost effective service.

Star-Architects

Running alongside this discourse was an agreement that there will still be a demand for the qualities of a starchitect – that there will always be clients and projects where a high level of brand image would be required. In addition, these architects were often key in the client securing funding for large building projects. However, the clients we spoke to suggested that this role could be carried out by other types of designers with similar 'brand' credentials in the future, for example fashion designers, product designers etc. A smaller developer asserted that he would always seek architects and consultants who were highly engaged in the design process on a range of different projects, and that this would not be limited to the iconic projects – however this view was not typical.

Design as a business

Some representatives on the demand side also perpetuated the view that architects are so preoccupied with their 'vocation' that they do not consider that practice is a business, and are less excited by the prospect of creating a successful business than a high profile in the profession. There was also some continuation of the belief that architects are arrogant and focused on embodying their own ideologies rather than providing a service to clients. However these views need to be put in the context of the great esteem in which UK architects are held internationally and the undoubted profitability of many of our better established and high profile firms.

1.0 What we were told by...

1.03 Students and Graduates

Sample: 14 architecture, engineering, urban design and surveying students or recent graduates, ranging from the very start of their education to their first few years in practice.

Social conscience

There was agreement amongst many of the recent graduates and students that we spoke to that they had chosen to go into the built environment professions with a social agenda. Both the engineering students and the architects agreed that the architecture profession brought a 'social science' aspect to the building process that engineers often lacked. However, the engineering students believed the engineers of the future would be leading the production of buildings, unless architects became more skilled in engineering.

Multidisciplinary practice

Most of the architects and planning students felt frustrated at the range of employment prospects facing them, and one recent graduate had already set up his own practice as a reaction to the lack of attractive practices. There was a strong desire to be part of a medium sized multidisciplinary practice that fused the skills of architects, planners and other types of designers towards more dynamic, creative work that did not necessarily fit the narrow definition of architecture. Many of the graduates voiced a preference for looser working relationships with, for example, a working week that was split evenly between working for a practice and having time to pursue their own projects independently. This was a trend that a number had experienced and

enjoyed. The concept of a multidisciplinary practice was developed with the notion of networked practice, where a large number of professionals with different skills and backgrounds were joined in a more informal way, coming together when a project required them to. This appealed to the architects, planners and engineers in this group.

Creative consultants

The graduates and students of architecture echoed the same concerns over the title 'architect' as the practising architects we interviewed. The term 'creative consultant' was coined by one architecture graduate to describe the type of practice he was striving for, and the term 'design thinking' was also popular amongst the group. Many saw the label 'architect' as restrictive and as creating barriers between themselves and other professions such as planning and urban design. Most of the students agreed that this was a situation that had been fuelled by a deep segregation between architecture departments and other related departments during higher education. It was this deep rooted separation that they felt continued into practice – hindering the goal of multidisciplinarity and a holistic approach to solving problems within the built environment. Interestingly, students and graduates of engineering were more positive about their education process, and said they felt well integrated into the other built environment professions – putting them in a good position to lead the design team. An architecture graduate who had done considerable work in the field of disaster relief and development agreed that there was a strong threat from engineers, whose technical abilities far outstripped the architect.

Changing expectations

When presented with an example of a contemporary multidisciplinary practice, employing 47,000 employees and working globally, the group we interviewed voiced little desire to become part of such a practice. Admittedly idealistic, many individuals expressed an aspiration to break down traditional models of practice in the future, and reinvent a networked multidisciplinary practice that better suited their objectives. There were only very few individuals who were interested in sitting on the other side of the table and becoming clients, developers, project managers etc – though the interest amongst the engineers appeared higher than amongst the architects.

2.0 Propositions for 2025

2.01 Who will design our built environment in 2025?

Parts of the industry that could remain relatively stable:

1) The small local general practice

Will be judged by their ability to produce a personal service, with one-stop-shop design that is clearly differentiated in terms of value-added from their competitors: the 'plan-smiths', surveyors and builders.

Small practices get 86% of their workload from the private sector, whilst large practices get only 58%.

It is highly likely that there is one part of the profession that will show resilience to the changes of the next decade: the small general practice and the sole practitioner working for private clients with local builders. There is a unanimous feeling that these small practices can and will continue to practice in a similar way to now, and that they face comparatively little competition from other professionals or practitioners – not least because of the modesty of the financial returns for these services. However, they may face competition from non-architect qualified players such as contractors and plan drawers, who will continue to put pressure on fees. This type of practice would be best positioned if they offered a turn-key service, containing all the services

required for a small-build project within one company – thus simplifying the process for potential clients. Their growth is constrained by issues surrounding professional indemnity insurance, their ability to manage and share risk, and the cost of investment in IT. While they may make up a numerically significant proportion of the profession, in terms of the value of construction they are in decline – as many professional clients look to bundle smaller jobs into larger contracts.

2) The international star Architects

Will be judged by their ability to produce eye-popping, 'wow-factor' design that might help their clients to raise funds, while making a significant contribution to the brand profile of their client.

"I think the entire range of middle-sized practices from about 25-150 people will be gone, and we'll end up with two very distinct types of practice at each end of the market."

Chief Executive
Global Consultancy

There will always be some clients in search of trophy buildings who will look to star architects to create them. While the current economic climate persists, their number is likely to be more modest than the millennium years. Similarly, repeat clients will probably always commission a small proportion of their work from star architects who can offer them unparalleled levels of exposure and brand image. This is a small but influential part of the profession where design, or at least the image of design, remains the overarching driver over cost. This type of architect is likely to only complete concept design for the international market, working with local architects to complete the detailed design. Alternatively, there will be a growing trend for the project to be taken on by large construction companies after the concept design stage – in-house design teams will then take the building to completion. The importance of brand for the client in this type of project will be paramount, and will be an important factor in securing funding for such commissions – one of the integral reasons for choosing a star architect. However, it is increasingly likely that artists and designers from other professions will be commissioned to take on the concept design of a building. There are already examples of fashion and product designers moving into this territory, and collaborations with star architects could become commonplace.

3) Specialist niche practices

Will be judged by their ability to provide increasingly complex, niche services as part of a larger design team and process.

There will always be a role for the highly specialist service providers in the fields of access, CDM, rights of light, expert witness and so on. As buildings themselves become more complex and technical, the need for these types of services will continue and may possibly expand.

4) Traditional regional delivery driven practices

Will be judged by their ability to provide cost effective, process-driven services to lay clients who have little interest in design for its own sake.

When commissioning buildings, the vast majority of UK businesses are driven by practicality and price. These clients are not interested in 'fancy architecture' and are most comfortable working with local practices that are known through the local business community and where the network of connections allows for easy communications and simple solutions. The success of these practices will be dependent on the local economy, and will be driven by repeat business and word of mouth recommendations rather than openly competitive procurement. They will work as much on refurbishment projects as on new build and will provide a strong, no nonsense, local service. In some senses these practices are the most traditional of all.

Parts of the industry with the greatest opportunities for growth in the next five to ten years:

1) Practices in emerging economies

Will be judged by their ability to produce reliable design at lower cost and faster than their western competitors.

" The UK has a finite market - anyone who has larger scale aspirations is going to have to look overseas."

Architect
Medium sized design-led practice

A growing workforce in the BRIC nations of highly skilled architects who are as professionally competent as their western counterparts will present an increasing threat over the next five years as they offer services at competitively lower rates to UK practices. This is already being made apparent with practices in the UK being undercut by other UK practices who are outsourcing work to cheaper Asian workforces. Some practices interviewed considered this to be benign and a harmless and necessary part of the industry, whereas others worried about the loss of quality control. There is a real fear that those practices not prepared to outsource work on the basis of design quality will no longer be able to compete in a home market where cost is the dominant factor. In addition to the threat of outsourcing, those workforces will also present themselves as practices in the UK market. We are very used to the presence of American and Austalian practices working in the UK, and in the future we are likely to see Asian/Commonwealth practices of a similar scale working here too.

Over the next decade, infrastructure construction is projected to grow by 128% in emerging markets, compared with 18% projected growth in developed markets.

2) Global interdisciplinary consultancies

Will be judged by their ability to consistently complete projects at a range of scales, particularly large, at low cost, quickly and with an integrated design process – and will also increasingly be judged on the quality of their design and international credentials.

> **"Big clients are moving towards using one-stop-shop global service providers - the profession will have to keep in line with that."**
> Developer
> Large UK-based company

The last five years have seen the unprecedented growth of integrated consultancies whose appetite to swallow up smaller firms seems to know no bounds. These practices are spread globally and employ interdisciplinary staff. This type of practice marks a fundamental shift in the profession away from design-led practice towards a process-driven consultancy often led by engineers. This is a marked change from the past where design was the exclusive domain of architects (and designers). These large conglomerates offer a more cost effective, business savvy package than a medium sized architectural practice working with an on-off project specific team. These types of consultancy are most attractive to international clients, including those from the developing nations, and the larger clients (often public sector) in the UK who are looking to mitigate risk above all else. These firms represent one of the main threats to the medium to large sized architecture practice, as they win the trust of the clients in terms of delivering the whole project. There is an increasing volume of large-scale projects, like the Olympics, Crossrail etc, which are being procured in one package, and while some of the large players that win these contracts will then employ smaller 'design houses' to conceptualise individual buldings, in the future this work will increasingly be kept in-house.

> **"Risk will shape the industry in the next 15 years."**
> Client Advisor
> Global consultancy

The knock-on effect of more and more projects being carried out by large consultancies in the next ten years is that architects are pushed further down the pecking order, reducing their overall design influence and weakening their relationship with the client and end user. Some of these organisations have already started to react to this trend, and have actively recruited architects with kudos to improve the design credentials of their firm. In the future, the landscape of practice may well be made up of a small number of very large mega consultancies, who will be the primary employers of architects – hoovering up talent in order to improve their design offer to clients.

3) BOOT (Build-Own-Operate-Transfer) designers

Will be judged by their ability to generate, realise and manage mixed scale projects with little risk for the client organisation.

> **In the 1970s 50% of architects were employed by the public sector, now less than 9% are.**

In the last 30 years public sector work has increased from 30% of the total value of UK construction output to 40% (source: RIBA Way Ahead Review). This growth is reflected in changes to public procurement processes and has given rise to PFI and framework partnerships. Although a somewhat cumbersome and costly method of procurement, these processes transfer long-term risk away from the client organisation – and are thus favoured by many public sector organisations.
PFI has created a new breed of contractors with a range of new skills primarily around raising capital, finance management, project management and post-occupancy management. Their evolution over the next ten years could see them grow into large, multi-skilled businesses directly employing a large number of architects' in both traditional and senior management roles. These will operate under the BOOT concept, carrying large projects from conception through to completion and operation – globally, this is an idea growing in popularity. Already we are seeing over 50% of the construction value of architects UK workload coming from contractor clients – and this

> **Over 50% of the construction value of UK architects' workload is for contractor clients.**

figure seems highly likely to grow. (It is worth noting that the short-term reduction in public procurement due to the current political situation has been disregarded as we are looking at a fifteen-year driver.)

4) Subcontractors/specialist suppliers

Will be judged by their ability to keep up to date with the latest developments in construction and design, and to increasingly take on more of the design process.

"Detailed design is increasingly coming through the supply chain - and this is exactly the right place for it. With increasing complexity of building technology you cannot expect architects to have that role."

Engineer
Global firm

More and more detailed design is being left to subcontractors and specialist suppliers: cladding, roof structures, M&E installations, partitioning etc. In the past the architect would have designed each detail and component, and taken on the associated design liability. Increased sophistication of detailing and building technology and its associated risk management have led to a gradual residualisation of the architect in favour of the subcontractor who will continue to take on an increasingly large part of the design work over the next ten years. This trend is exacerbated as architects look to reduce their liability by transferring it to the subcontractors and suppliers, and thereby losing influence. It is very clear that whichever party takes on the risk in the building process tends to drive the design. Increasingly, architects are integrating elements and components designed by others, acting in a design management role.

5) Design houses/creative agencies

Will be judged by their ability to move easily between disciplines, to solve problems creatively in any field and to gather a vibrant and mixed range of skills under one roof.

This type of practice, which is emerging out of the recent cohorts of graduates, is not committed to delivering architectural services, but is more flexible in following the market. They will continue to grow because they are willing and excited to try their hand at anything that involves 'design thinking'. This type of practice could do well if it is driven by technology, and by the new markets where technology provide opportunities. They might pool the collaborative talents of brand consultants, researchers, product and industrial designers, with architects. This is a strand of practice that may well break free from the constraints of the term 'architect', possessing a much broader base than the term can provide. Service design and design of experiences might be significant areas for these practitioners.

Parts of the industry under the greatest pressure:

" I think we need to stop being overly polite and learn how to be business people."

Architect
Medium sized design-led practice

1) Medium sized design-led practices

Will be under pressure from larger practices that have bolted on design talent and speak the commercial language of clients.

The medium sized design-led practices, employing between 30 to 100 members of staff, are increasingly under threat from the parts of the industry listed above, who claim to be able to provide their services more cheaply, comprehensively and frequently with more business acumen, while possessing a greater ability and appetite to share risk with their clients. Many of these practitioners are less familiar with and sophisticated in the commercial language of the client and lack the breadth of experience and expertise which larger practices can call on. Consequently, they tend to be more focussed on design excellence than cost and programme management. These practices cannot be sustained by the small projects carried out by

The number of architects registered in the UK continues to grow - rising 10% between 1999 and 2009.

sole practitioners and small general practices, but they do not have the broader set of skills to compete with the large, global, multidisciplinary practices and integrated consultancies. Their focus on what they can offer the client, rather than what the client wants, and an inability to adapt their services could lead to shrinking opportunities and a smaller market share.

2) Small metropolitan boutique practices

Will be reliant on design-aware clients who are looking to commission exciting and boundary-pushing design, whilst broadening their skill set, working collaboratively and managing their client's risk.

The small, metropolitan boutique practice is distinct from the small general practice in the type of work it takes on and its aspirations – to push the boundaries of design, offering a less traditional and less straight forward service, effectively offering the qualities of the star architect on a smaller scale. These practices will find it increasingly difficult to work on the scale and type of projects they want, primarily due to the prohibitive nature of their size, which restricts their ability to take on risk – a key consideration for many corporate and public sector clients. Their size will also constrain their investment in IT, in turn making them less attractive to the larger clients. These practices will be best positioned if they partner up, either with a group of smaller practices or with one of the larger practices – in order to establish a size large enough to avoid many of these issues.

"Our main threat is not being paid for the work we do - particularly the brief making part. But we never turn down unpaid work because it might lead to paid work in the future."

Architect
Small metropolitan boutique practice

2.0 Propositions for 2025

2.02 What roles might those trained in architecture have in 2025?

In the future we may see more practitioners working in broad, interdisciplinary, internationally focused, creative and strategic businesses, as well as holding positions of seniority in the construction industry.

What is an Architect?

> **"The invasion of the architect's role shouldn't be seen as a threat but as a natural change that can be exploited - we must find our own new opportunities and education should shift to accomodate that."**
>
> Architect
> Large global practice

In order to answer this question, it is necessary to look in more detail at what architects are doing now. Although the core of local, traditional, delivery-led practices remain, many of the practices we spoke to had expanded upon the type of work that would traditionally be considered the architect's field, offering a broader range of services. A number of the practices we interviewed said that they had at times felt restricted by the term 'architect', and that it was often the reason they were not able to charge a fee for work that does not fall into the traditional perception of the role. Those who most strongly voiced this opinion considered themselves instead to be 'spatial agencies' or 'design houses'. Many were not working as 'architects' in the formal sense recognised by the RIBA and the ARB, yet they still have a significant role in affecting the built environment – unsupported and unrecognised by the profession.

There are architects working in the fields of set and stage design, public art, installation design, design of public space, brand design, community consultation, research, think tanks and urban design, as well as those working on the demand side of more traditional building contracts . The younger members of the profession that we spoke to expressed a strong desire to be part of this much broader reaching, interdisciplinary concept of architectural practice – suggesting a future of much looser definitions and more slippery modes of practice. The RIBA might need to consider evolving the 20th century definition of what it means to be an architect in order to fit better with the 21st century reality of the profession. Communities of practice go some way to filling the void that the membership organisations leave behind – The Academy of Urbanism is a good example of this. However, working towards a broader definition of an architect would position graduates to move into career paths leading to a wider range of roles in the built environment professions and to better respond to the changing nature of practice. In order to survive, the architect must design beyond buildings – and in turn should be supported to do so by regulatory and membership bodies.

> **"I feel a bit orphaned by the profession."**
>
> Architect
> Medium sized design-led practice

> **" In ten years we probably will not call ourselves an architecture practice, it will be something else entirely."**
>
> Architect
> Small metropolitan boutique practice

As we have already established earlier in this report, we think it is highly likely that the baseline of sole practitioners and small general practices working for private clients and local builders will remain fairly unscathed over the next fifteen years. However, given that the past thirty years has seen a dramatic shift away from architects employed by the public sector, from 50% in the 1970's to less than 9%

now, there is no reason to believe that a similarly profound change will not affect the profession in the next fifteen years. Already, over 50% of UK architects' workload is for contractor clients – a statistic that would have seemed unimaginable twenty years ago – and already, those clients are introducing a future in which in-house teams work under design directors or external subcontractors to manage the detailed design and construction stages. So, for many practitioners, their role and position within the construction industry is already changing.

> **"The problem is the separation between what architects want to do, and the reality of the marketplace."**
>
> Client Advisor
> Global Consultancy

The Broader Built Environment Professions

Despite the decline of the traditional architects' role, the number of trained architects holding senior positions across the industry seems to be gathering pace. As the demand for traditional skills declines and the architect's role becomes circumscribed, the opportunity for architects to take roles in the rest of the industry increases.

> **Between 2004 and 2009 17,111 students entered UK universities at Part 1, whilst only 7,756 entered at Part 2: a 55% difference between the two.**

Architectural education continues to produce more qualified and part qualified architects than the profession can accommodate in traditional roles. Indeed, of the average cohort entering UK Universities to study architecture at Part 1, only around 55% continue to Part 2 - with a further 17% drop between in those entering Part 2 and those finally registering as an architect. This clearly shows that the education system is producing a huge number of part qualified professionals who may well not be practicing as traditional architects. At the moment, those who move into other areas of work are effectively lost to the profession. Yet, in many instances they exert considerable influence on our built environment, occupying a number of prominent positions within client and contractor organisations as well as in policy units and the press and media. The architectural profession attracts arguably some of the highest calibre students into its education system – and those graduates are well equipped to move into careers in the broader industry regardless of their traditional architectural training. We may see an increasing number of graduates doing things other than RIBA stages A-L.

> **Between 2004 and 2009 6,433 architects registered with the ARB - 62% fewer than registering at Part 1 and 17% fewer than registering at Part 2.**

2.0 Propositions for 2025

2.03 How might practice change by 2025?

In the future architects may work in a more consultative, networked manner.

Branching into General Consultancy

Architects possess a huge range of skills, many of which go unnoticed, unused or most importantly unpaid! The vast majority of these skills come under 'pre-project' – all the community consultation and analysis, brief development, strategic thinking and preparatory work that lies behind the early design stages. There was a unanimous feeling amongst the practices interviewed that architects continually provide these sorts of services for free – and that this would never happen in any other profession.

"The profession is heading towards consultancy. I think that architects will have the greatest influence if they concentrate on high-end consultancy and strategic thinking."

Project Manager
Global consultancy

"You wouldn't go to a dentist, ask them to make a model of a new tooth for you, and then if it works out well we'll see if we want to engage you to do the real one!"

Architect
Small metropolitan boutique practice

There was agreement from the client side that these skills are really valued but that a culture shift will be

required to persuade them to pay for them in the same way that they pay for traditional architectural services. A number of the practices we interviewed had already or were planning to formalise the diverse services that they offer. One practice we spoke to represented a key example, having successfully set up a sister company to address the masterplanning and community consultation services they found they were increasingly doing as an architecture practice. The sister company enables them to provide services that clients did not traditionally look to an architect to do – removing the label of 'architect' that was tied to their practice, freeing them to provide skills other than designing a building. Importantly, it also enabled them to advise other architects and collaborate with them without being competitive. Interestingly, the separation from the architecture practice has also meant that the sister company has managed to tap a new source of income while also positioning itself on the client/user side of the table – thereby opening a broader spectrum of opportunities.

Since 2008 there has been a 40% reduction in demand for architects' services in the UK.

Another practice was making plans to set up two satellite companies – addressing their interests and increasing demand for economic branding and industrial urbanism. The practice director spoke of their practice strategy of trying to break the traditional work process into smaller 'chunks', for which they could charge a separate fee for, rather than drawing out a long process and receiving only one fee. Like the previous example, this practice spoke of the narrowness of the term 'architect' – that it restricted both what services clients were willing to pay them to do and what they were approached to do.

This approach could also favour practices with a strong track record and portfolio at a particular phase of the design process – for example taking projects to planning stage. In the same way, this could be separated off as a specific service, with a practice brand established to delineate it from other service offerings. This could be a very attractive option in the next five years when clients who cannot invest long term in the whole building process look to break down the process into smaller parts.

One design studio we interviewed represents the extreme repacking of an architect's skills. The director has architectural training but has applied his skills in the realms of public art, installation design, lighting design, product design, industrial design and interior design – also employing the business models associated with those particular industries (commission based, consultancy and made to order products).

Commercial vs Design-led Practice

Only 50% of UK practices have a business plan.

In order to compete against the cheaper workforces from emerging markets and the financially stronger mega consultancies, small and medium sized practices must spend time learning about the financial, social and commercial environment in which their clients operate, so that they can demonstrate that in designing a building they are contributing to achieving their wider goals. The contemporary division between design practices, the classic studio architect and the more commercial consultancy, appears to be becoming increasingly polarised. It is the continuing distinction between these two which threatens the former. Architects need, as a matter of urgency, to be able to sell their skills with reference to cost if they are to be of use to a client. Most practices should concentrate on capital cost savings and not whole life costing, in order to be more persuasive to the client, in this way they are in a better position to raise their fee. All architects need to ensure their financial and economic skills keep pace with the increasingly sophisticated and complex financial environment of the globalised economy. An ability to manipulate the interaction between initial capital costs, whole life costs and carbon costs will be an inescapable part of the design process.

This skilling-up of the profession is absolutely imperative if it is to stand any chance of surviving the next fifteen years intact. The profession must face up to the reality that the context within which it now practices is continuing to change so dramatically that the skill set required must also shift – with financial skills now considered to be core. In addition to financial literacy, the client-savvy architect must be able to see beyond 'building a building' and

offer a service that embraces the client's broader aims, becoming a problem solver as well as a designer.

Networked Practices

"We will never outsource and will compete with those who do by doing it better."

Architect
Medium sized design-led practice

The effects of globalisation and integrated working (BIM) were themes in many of our interviews, with particular speculation about the threat of outsourcing and highly skilled workforces in Asia mobilising to outbid western practices, as well as the increasing use of technology to meet client demands for better faster, integrated design and delivery service. A forward thinking practice could mobilise outsourcing to great effect by stripping down to a small number of core employees, with all other work, particularly technical, being outsourced to a network of trusted consultants – becoming far more nimble and light on its feet. In this respect, this practice would be able to keep up with advances in technology, programming and skills – having access to the absolute best in each field. This mode of practice would be far leaner, cutting down a huge amount of the overheads of running a practice. Another mode of networked working which would appeal to large clients is a practice that provides a one-stop-shop service through a network of consultants offering a full range of services. This type of practice would rely heavily on integrated working and associated advances in technology to provide a seamless service.

" We're interested in consortiums of engineers and architects who are not the same company but who link up."

Architect
Small metropolitan boutique practice

Integration of Education and Practice

The majority of practices we interviewed felt very strongly that a connection with the schools of architecture was very important, and in some cases integral to their practice. Many spoke of the opportunities, contacts and networking afforded by teaching, and of the all important supplement to a dwindling income. For others it was a vital source of employees and a method of establishing a practice's corporate culture within a school. For some practices, establishing a connection with a school is about drawing from a talent pool and being able to continue that pool by offering ongoing employment. For small, boutique practices whose ethos is essential to the vision of their practice, teaching offers an opportunity to hone and develop that mantra – testing it against the rigours that teaching provides. At another practice, the connection between the Director's professorial role at a University and the practice runs to a theoretical level – with an almost atelier-like atmosphere. A director at a further practice had been teaching at a London university for some time, but more recently had been developing the course towards a particular large-scale type of urbanism which his practice is beginning to explore – seeing the course as a potential pool of future talent which could not be produced elsewhere.

> **"You definitely won't see one of our offices where there isn't a school of architecture!"**
>
> Architect
> Large global practice

> **The number of students entering UK universities at part I rose 23% between 2004-2009.**

A number of large architectural or multidisciplinary practices are already setting up their own internal 'Universities', initially for employees but often with the view to offering courses to outsiders. There are also small practices running schemes such as Summer Schools. This points towards a future of architecture schools perhaps being embedded in and carrying the brand of individual practices. The success of Cambridge University's part II course, whose structure sees teaching integrated into practice, suggests a mode of future practice inextricably linked to education. An even more enhanced model of this, whereby practices were further integrated into schools and vice-versa would appear to improve the educational offer, as well as providing practice with considerable benefits.

Similarly, there is a growing interest in post-graduate part time courses from professionals working in the built environment – whether on the supply or the demand side. Courses such as the Cities Programme at LSE, African Centre for Citires at Cape Town University, the MIDIM programme at Hong Kong University and IDBE at Cambridge are underpinning interdisciplinary thinking across the industry, further blurring the egdes of traditional 20th century professional roles.

The Culture of Practice

It appears that the culture of practice is becoming increasingly important – enabling distinctiveness and diversity in a climate of homogeneity. We found that even practices who did not specifically refer to a culture of practice, still described themselves in quite distinct terms, revealing the underlying impetus behind their evolution. A number of architects and designers we spoke to had built their brand on the basis of a very particular way of working, or a set of founding principles. This was consistently tied to clear ideas of longevity and of survival beyond the founding partners. The graduates and students were the group who most frequently described practices in terms of culture – describing their ideal employer with very specific provisos regarding underlying ideas, ethical stance, attitude and many other culture-related themes. It would be reasonable to infer from this that for many practices, a specific embedded culture is very important and will enable them to stand apart from their peers in a crowded marketplace. This may not be a new phenomenon, but could be an increasingly vital part of practice in the future.

> **"I think the world needs more collective, empathetic groupings of architects; collectives can have a bigger impact than an individual, and more collectives would give the profession a bigger impact."**
>
> Engineer
> Global firm

Conclusion

In the course of this study we have learned that there are many different views about the future for architects. It has not been feasible to consolidate them into a single readily digestible picture, nor did we expect to. However we have tried to tease out what trends are likely to be most influential, to place them in a wider global context, and to consider what this means for the industry as it is currently structured. It will have been a worthwhile exercise if it stimulates those who are embarking on a career in architecture, as well as others who have previously done so, to reflect on how rapidly the context in which they work is changing, and the need to be proactive in responding to it if they are to optimise their contribution.

The UK construction industry contributes around 10% of UK GDP. The work of the professions that drive it is therefore of vital importance to our society, and their expertise is reflected in a strong global reputation. However with growth in the developed world, and Europe in particular, now consistently below that of the far more populous developing world, our domestic market is shrinking proportionately, as the rest of the world moves closer to our standard of living. Thus while the domestic market will remain substantial, (although continuing to be subject to wide fluctuations such as we are currently experiencing), it will be an ever more modest proportion of global construction activity. This is well understood by the larger UK practices, which are already strongly represented overseas. However, accessing these markets is more difficult for smaller firms or sole practitioners – a form of business that seems to be hard wired into the architectural profession's gene.

In recent decades architecture has been a popular choice for undergraduates,

with the consequence that more students achieve a first degree in architecture than can be absorbed into conventional architectural roles. This is also true of those who complete a second degree, some of whom decide that those conventional roles hold little appeal, and who choose to take on other functions in the property and construction sectors – or find themselves working in the often more innovative fringes of practice developing new services in related areas and opening up new markets. Architectural education, (like those of the other professions), is generally undertaken in isolation from other parts of the wider industry, which can give rise to a sense of exclusiveness. This makes it more difficult for architects to perceive their role as part of the construction industry, with many preferring to emphasise their place in the wider creative sector. While the latter is a key element in our sense of national identity, and an important part of the UK economy, its economic contribution is not at the same level as construction, and as a source of personal income is far more marginal.

It can sometimes seem that the long shadow of the gentleman architect still hangs over the profession, obscuring the fainter, earlier memory of the master builder. Contemporary society has more interest in the latter than the former. While the future for the practice of architecture as a discrete business is uncertain, the opportunities for architects have never been greater, notwithstanding the current recession. However to grasp those opportunities architects will need to develop greater financial nous and commercial acumen, to welcome the integration of their work with others in the wider industry, and continue to work hard to promote the extraordinary benefits which society gains from the design process.

Appendix

Appendix 1 : RIBA Constructive Change Drivers

Rank	Drivers for change in last decade (1990s)	Future drivers for change (2005)
1	New methods of procurement – PFI, Design & Build	Sustainability / Social responsibility – social, environmental, economic.
2	Rethinking Construction Agenda – collaborative working, supply chain integration, partnering	Future skill needs and training
3	Recognition of need to change industry	Increased standardisation and industrialisation
4	IT – in its widest sense	Globalisation
5	Increased scrutiny and managerialism	Rise of consumer power and expectations

Source: RIBA Constructive Change, 2005, Bob White.

Appendix 2 : Interview Questions

Part 1: Your Vision

- Could you summarise your vision for your business and help us understand how you see it in 10 years time.
- Is there a discrepancy between where you would ideally like your business to be, and where you think it will be in 10 years time?
- Where do you see your workload coming from?
- Which countries will your practice be operating in, in 10 years time?

Part 2: How will you get there?

- What steps are you taking toward reaching your vision?
- What new skills will you and your staff need to take you there?
- How will your practice be structured?
- How will you extend your practice abroad? (A takeover, local recruitment, sending UK staff over?)

Part 3: Threats/Opportunities to your vision

- Where/which areas do you see the most significant opportunities for your business?
- Where are the principal threats to your business?

- Will tools like BIM enhance or diminish the significance of the architect/your role?
- What affect has the recession had on the progression of your business towards achieving its goals?
- How will the increasing complexity of regulations, particularly abroad, impact on the likelihood of achieving your vision?
- What is the affect of globalisation and related cultural issues such as mass immigration, the networked society and global sameness?

Appendix 3 : Interviewees

Tony McGuirk – BDP
Sadie Morgan/Alex de Rijke – DRMM
Russell Brown – Hawkins Brown
Geoff Shearcroft/Daisy Froud – AOC
Michael Pawlyn – Exploration
Jason Bruges – Jason Bruges Studio
Steve McAdam – Fluid
David Standford – 3D Reid
Andrew Shoben – Greyworld
Alan Pert – NORD
Dominic Papa – S333

Paul Heather – Skanska
Steve McGuckin – Turner and Townsend
Charles McBeath – Ramboll
Simon Smith – Ramboll
Adrian Penfold – British Land
James Bowyer – E C Harriss
James Berry – Woodsbaggot
Benjy Lesser – Derwent
Mike Peasland – Balfour Beatty
Chris Tinker – Crest Nicholson
Richard Baldwin – David Langdon

In addition, a group of 15 students and graduates from: The Bartlett School of Architecture and Planning, The Royal College of Art, Nottingham University, Imperial College London, Kingston University, London Metropolitan University, University of Greenwich and The Architectural Association.

Appendix 3 : References for Statistics

Front Cover:

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Page 23:

"Over the next decade, infrastructure construction is projected to grow by 128% in emerging markets, compared with 18% projected growth in developed markets."
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"In the 1970s 50% of architects were employed by the public sector, now less than 9% are."
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"Currently, over 50% of the construction value of UK architects workload is for contractor clients."
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