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EXPORTING ARCHITECTURAL SERVICES: THE ENGLISH AND FRENCH EXPERIENCES

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This paper reports the results of research into the experiences of English and French architectural practices competing in the developing European market. In order to do this, principals from 60 architectural practices — 30 in each country — were interviewed in order to understand the means and motives for exporting architectural services from their own country, to either the other country, or to Germany. This paper starts with a review of the literature on the strategic management of architectural practice before moving on to present the principal findings of the survey of architectural practices. In order to offer a preliminary explanation of the differences found, the results are related to distinctive features of the construction business systems in each country.

INTRODUCTION

The development of the single European market over the last decade has led to an increase in cross-border activity by architectural practices. The aim of this paper is to report the results of research into the experiences of English and French architectural practices competing in this developing European market. The research was prompted by a concern within the French government and architectural community that French architectural practices were relatively unsuccessful in this European market (Contenay, 1995), particularly compared to British counterparts. Our research confirmed this difference in export performance within the European Union, and found that they were rooted in differences in the strategic management of practices on each side of The Channel. In order to do this, principals from 60 architectural practices — 30 in each country — were interviewed in order to understand the means and motives for exporting architectural services from their own country, to either the other country, or to Germany. The research was funded by the Euroconception programme of Plan Construction et Architecture, an agency of the French construction ministry.

The paper will start with a review of the literature on the strategic management of architectural practice, before moving on to present the principal findings of the survey of architectural practices. In conclusion, the results will be related to distinctive features of the construction business systems in each country in order to offer a preliminary explanation of the differences found. A more extensive presentation of the research results can be found elsewhere (Carr, *et al.*, 1999).

THE STRATEGIC MANAGEMENT OF ARCHITECTURAL PRACTICE

Earlier research work on the strategic management of architectural practices has demonstrated that it is possible to study architectural practices with the same concepts that are deployed more generally in the analysis of organizations, an approach pioneered by Blau (1984). Building on the work of Maister (1982), Coxe, *et al*., (1987), and Porter (1980), the earlier research identified two dimensions by which the market for architectural services could be measured, leading to the identification of four generic strategies for architectural practices. The two market dimensions were the complexity of projects which the practice was able to tackle, and the quality preference of the client (Winch and Schneider, 1993). The first dimension is straightforward, and refers to the level of experience and organizational capability required for the project. The second dimension is more subtle; it refers to who will be the arbiter of architectural quality on the project.

Peer review is the case where the architectural profession will be the judge. Clients want a "signature" building, and are happy for the process of architectural review and critique amongst architects themselves to determine the quality of the final outcome. This process is clear with projects such as the Guggenheim Museum, by Frank Gehry in Bilbao. Client review is the case where the building must meet specific operational client needs, and the client is less sensitive to purely aesthetic issues and more concerned with the functionality of the completed building. The building must first address the needs of its corporate or public clients by housing their operations efficiently and effectively; clients are, therefore, the final arbiters of good architecture. This is not to argue that signature buildings do not meet operational needs, nor that meeting operational needs must compromise aesthetic considerations, but that the lead criterion for what is good architecture and who determines what is good architecture differs in the two cases.

These two dimensions lead to four generic strategies as illustrated in Figure 1. The strong delivery practice focuses on relatively simple building types and meeting client needs cheaply and effectively. Strong experience practice focuses on relatively complex building types, solving difficult architectural problems to meet clients' operational requirements. These problems are highly varied, but, for example, may be due to the complexity of the building type itself — theatres, hospitals, airports; contextual problems, such as inserting the building in the existing urban context; or the historical character of the existing building requiring refurbishment. Here, previous experience in solving particular problems related to the client's brief is the crucial factor in gaining the commission. Typically, the

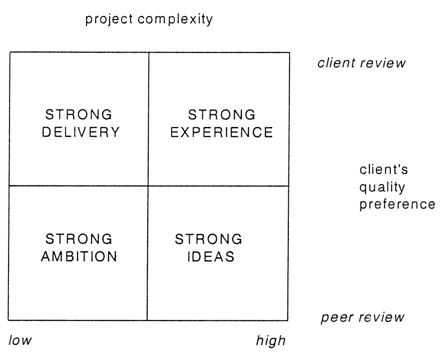

FIGURE 1. Generic strategies for architectural practice. Source: Winch and Schneider (1993).

strong ambition practice, one which has been formed only recently, is waiting for its first major commission, and the principals may be making a living through teaching or entering competitions. The final type is the strong ideas practice where the opportunity is to create a landmark building because the client requires that the building be noticed — this is the world of the star system. Here the crucial factor in winning a commission is a reputation for original and exciting solutions. This model of generic strategies for architectural practice has been found in subsequent research to be robust (Harwood, 1996) and was used as the conceptual framework for the collection of the data.

The research deployed a case survey methodology (Winch, 1994). Thirty practices were interviewed in each of France and England, the principal criterion for inclusion being that they had worked either in the other country or in Germany. The English ones were sampled from the RIBA Compendium of International Practices, from which it was possible to identify practices which had worked in France or Germany. No such document exists in France, and we were obliged to use informal methods to identify practices for inclusion in the survey. It proved difficult to find 30 French practices with some international experience.

Interviews were conducted with an appropriate partner or other principal of the practice as informant to a structured aide memoir. This ensured that the basic data were collected, while allowing for particularly interesting aspects of the responses to be explored further. The fieldwork took place between the summers of 1996 and 1997. Each interview was combined with practice documentation and written up as a case study. Then all 60 case studies were meta-analyzed to produce the data presented in the following sections. It should be remembered that these data are not from random samples of practices in each country, but from French and English practices selected because of their experience of working in the UK and Germany, or France and Germany respectively. The results here cannot be taken as representative of architectural practice in the two countries, but they can be taken as representative of those practices that are actively exporting in the European Union.

THE EXPORT ACTIVITIES OF ARCHITECTURAL PRACTICES

One of the most obvious differences between the samples of practices in the two countries is that the English practices were both twice as big and twice as old, on average, as the French practices. Table 1 gives the average figures for the two samples. Age is measured in years since foundation, and size is measured as total number of staff employed at the time of interview. Seven English practices were founded before 1945, including one founded in the 19th century. No French practice was founded before 1945 — the oldest had recently celebrated its 50th birthday at the time of interview. This was also by far the largest French practice, but it did not attain the size of the two biggest English practices. In fact, if the two public sector organizations are excluded from the comparison, no French practice attained over 100 staff compared to seven English private practices. These differences in age and size will become important elements of our explanation of the differences in export performance between England and France.

There was an interesting difference in the pattern of legal status of the practices interviewed. Under English law, a partnership is the traditional form of organization of professional practice. The partners have joint and several unlimited liability for the services they render. Over the last few years a number of practices have become incorporated either as private limited companies or public limited companies. The latter status offers the possibility of investment by external shareholders. A few

TABLE 1. Age and size of practice.

n=60	Mean Size	Mean Age
France	39	23
England	98	41

TABLE 2. Proportions of strong ideas and strong experience practices (%).

n=57	Strong Ideas	Strong Experience
English	28	72
French	53	46

English practices went as far as to raise capital on the open market through the stock exchange without notable success. Others guarded their professional status on the grounds that clients preferred unlimited liability and the culture of practice favored it. In France, the principles are similar with some practices retaining their status as liberal practitioners, while others are incorporated as a Société à Responsibilité Limité or a Société Anonyme. The data show that the French tend to favor the incorporated status (53% of practices) more than the English (33% of practices). Many of the largest and most active internationally English practices retain the partnership form.

During interviews, many of the French informants expressed the opinion that one of the main differences between English and French practices was that the former often integrate engineering and architecture. Practices were classified in terms of whether they offered only architectural services; combined these with another design service such as urban design, interior design, or landscape design; or combined with engineering capabilities. However, we found little difference between the two countries on this issue — 13% of English practices offered both architectural and engineering services, as did 20% of the French. The integrated professional practice is not typical of the English situation where purely architectural practices are more the norm amongst those which compete internationally.

We next investigated the selected strategies of the firms according to the Winch/Schneider matrix introduced in Figure 1. Our data here are the self-reported responses of the informant — the model was explained during the interview, and the informant was asked to place the strategy of the practice within the model. Most informants achieved this without difficulty. With the exception of two practices in France which were best classified as strong ambition which were selected for interview because they had English principals, and one practice in Britain which was classified as strong delivery, all practices could be classified as strong ideas or strong experience. This result was to be expected, as simple projects are unlikely to be able to carry the additional costs of hiring architects from abroad. Just over one-third of the practices (38%) could be classified as having a strong ideas strategy, and nearly two-thirds (57%) could be classified as having a strong experience one.

One of the most distinctive characteristics of the strong ideas firms was the insistence that they were generalists. They insisted they were capable of tackling whatever building type they were asked to design. In some cases this insistence ignored reality — one French informant insisted that he was a generalist despite the fact that every project he gave as an example during the interview was for the same very specific building type (archives) — but it was more generally true that the strong ideas firms had an impressively wide portfolio of building types. Some of the strong ideas firms insisted that they also had considerable experience of complex buildings. This is not contradicted by the model, it is simply that what they offer to clients first and foremost is their creative ability. In contrast, what the strong experience firms offer to clients is their competence in specific building types, although they were also capable of architecture of considerable grace and originality. Thus, one in-

Table 3. Market entry strategies of French and English practices.

n=53	France	England
Win a competition	9	9
Follow a client	9	26
x^2=2.25		

TABLE 4. Strategy and market entry.

n=39	Strong Ideas	Strong Experience
Follow client	5	19
Win a competition	14	1
x^2=16.6, significant at the 1% level		

formant claimed that his practice as a whole (we interviewed the UK subsidiary) had built more retail centers than any other practice in the world; while another stated that they had been involved in some 30 airport projects around the world since their first such commission at Heathrow in 1977; a third had built 34 general hospitals worldwide having started in Qatar in 1952.

However, when the data are examined in more detail, it is apparent that for the French, strong ideas firms predominate in export activity, while strong experience firms predominate amongst the English exporters. Table 2 shows that, excluding the strong ambition and delivery practices, while both main strategies are used in the two countries, the British have more strong experience practices than strong ideas ones, while for the French it is the inverse.

Most of the practices interviewed obtained a relatively small proportion of their annual turnover from abroad. There is a small number of practices — both strong experience and strong ideas practices — which gain over half of their turnover from abroad. However, over 60% of practices in each country earned less than 30% of their turnover in this way. It was also notable that many of the English firms have relatively small export activities, often limited to feasibility studies for their UK-based clients.

MODE OF ENTRY TO FOREIGN MARKETS

A particular focus of the research was on modes of entry to foreign markets. Each informant was asked to identify a project in each of the UK and Germany (if French), or France and Germany (if English), and to answer the questions posed with reference to the identified projects. This gave a sample of 73 foreign projects, as not all informants were able to identify a project in both foreign countries.

Four different modes of entry into foreign markets were identified. The first mode is to follow the foreign investment activities of a client for whom they have worked in the home country, accounting for 52% of all entries to foreign markets by the French and English firms surveyed. The second is to win an architectural competition, which accounted for 25% of all foreign market entries. The third was loosely defined as selective tender. This is sometimes a formal competitive tender, at other times it is a more informal entry into successful discussion with a potential client from abroad; this accounted for 19% of all entries. The final method identified was to use an introduction from another member of a network, but this only accounted for 4%.

A notable finding was that the mode of entry to foreign markets differed considerably between the two countries. Table 3 focuses on the two main strategies for exporting architectural services —

winning a competition abroad, and following an existing client into the export market. It shows that, while both the English and French practices were equally capable of winning competitions abroad, the English practices were much more capable of following their existing clients abroad than their French counterparts.

The mode of entry to foreign markets is related to strategy — strong ideas firms tend to favor competitions, while strong experience firms tend to favor following the client or selective tender, although in some cases strong ideas firms were simply invited to do the project such as the case of a French practice being directly invited to do landscape design by a British client, which we have classified as selective tender. Where the domestic client had a major program of international expansion, then a number of foreign projects in different countries can follow. This is particularly true of retail clients — for example, one French practice had followed its retail client to 15 different countries.

There is a strong correlation between strategy and mode of entry, which is shown in Table 4 where types of firms adopting each strategy are indicated. Taking just the strong ideas and strong experience firms against following the client and winning a competition, we find that strong experience firms favor following the client, while strong ideas firms favor competitions. This is to be expected — strong experiences firms rarely enter competitions, and if they do, it is unlikely that they will have the flair required to win them. On the other hand, strong ideas firms seek out the most exciting projects in architectural terms, rather than build up detailed knowledge of a particular client's requirements or a building type. They rarely obtain repeat business from a client, while strong experience firms rely upon it for their success.

Once market entry has been achieved, and a project is under way, the next problem is how to organize the project. Working abroad requires working in new ways because the institutional context varies significantly between countries — the practice of architecture is not universal. The principal points of variation are the relationship with the constructor and the regulations regarding urban planning and construction standards. In both cases, the ability to communicate and negotiate in the language of the country needs to be acquired.

We found five basic modes of association. Two of the forms were essentially temporary, and they tended to be favored more by the French. By far the most important was to form a temporary association with a local practice, which accounted for 52% of the projects discussed in interviews. The other temporary form was to open a local project office that closed upon completion, which happened on 15% of the projects. There was a strong correlation between the use of temporary forms of association and the strong ideas strategy. There appear to be two main reasons for this. The first is that strong ideas firms typically range globally in the search for challenging projects, and there is little point in establishing a base in any particular city. Secondly, they have considerable concern for "design control" — that is maintaining quality of the original concept as it enters the execution phase. Even in the largest strong ideas practices, the named principal retains an active interest in all projects going through the office. Thus only a minimal amount of work is done abroad, and many prefer to open a project office themselves rather than run the risk of problems of interfacing with local architects.

The other three forms were more permanent in character, and they indicate a concern to enter a national market as such and develop a client base there. The most important of these — accounting for 15% of project associations — was to join a more or less formal network of architectural practices across a number of European countries. Our research uncovered four of these. Where practices had not yet obtained a job in another country, but indicated that they would use their network, they were coded as associating through a network. The second permanent type is the joint venture between the market entrant and a local firm. This accounted for 12% of associations, while the use of a wholly owned subsidiary accounted for the balance of 6% of associations. The correlation between temporary and permanent associations and practice strategies is indicated in Table 5. This shows that while the strong experience firms use both temporary or permanent strategies in broadly equal number, strong

TABLE 5. Practice strategies and modes of association.

n=50	Strong Ideas	Strong Experience
temporary	17	18
permanent	1	14

x^2=6.3, significant at the 5% level.

ideas firms only use temporary strategies. It is inherent in their strategy and way of winning work abroad that they do not wish to enter into permanent relationships with local firms.

THE ORGANIZATION OF ARCHITECTURAL EXPORTS

Our survey of 60 British and French architectural practices has identified a number of important patterns regarding export activities. Most importantly, we have demonstrated that there are two very different strategies for the export of architectural services. The first is based upon the strong ideas generic strategy. It is a global strategy — firms range around the world, picking the most exciting projects driven by the talents of their principals who have a strong personal reputation. This is the star system at the international level. One informant argued that there were perhaps only 15 practices in the whole world in this category. These are the architects who are feted in the professional press, inspire the coming generation of students, and work at the leading edge of aesthetic innovation. They rarely work for the same client twice because few clients have a need for more than one signature building, and those that do often decide deliberately to spread their architectural patronage widely. Such practices often die with the retirement of their principals, or they mutate into strong experience practices. The case study of ARCOP, a leading Canadian practice (Mintzberg, *et al.*, 1988), demonstrates clearly the life cycle of a strong ideas practice from winning their first competition, to becoming a strong experience practice.

The strong ideas practices have a distinctive strategy for export. They usually enter foreign markets by winning an architectural competition; more rarely, they will be invited by potential clients wanting a signature building to make proposals. Most of the design work will be carried out in the main office, and the decision will be taken whether they will associate with a local firm or open a temporary office once the project goes on site. There was some evidence from our cases that strong ideas practices were shifting more towards opening their own temporary offices because of the problems of inducting local architects who are outside the practice into the principles of the design solution; design control is the paramount consideration for the strong ideas practice. Whichever option is chosen, the local implantation is essentially temporary.

This concern to retain as much as possible in-house poses particular problems of how to acquire the expertise in the local contracting system that a foreign collaborator would supply. This was solved in many of our cases by a particular adaptation of the distinctive human resource strategy deployed by strong ideas practices known as "up or out" or "churning" (Maister, 1982). Strong ideas practices maintain their dynamic by picking the brightest graduates of the leading architecture schools and mobilizing their energy and creativity for a period — typically around five years. A few will stay on to become associates and manage projects, but most will be expected to leave after the period and set up for themselves as strong ambition practices trading on the reflected reputation of having worked for a star. This high labor turnover allows these practices to employ large numbers of foreign architects who speak the language and know the system in the countries, where the practice might be expected to win work. Thus, large numbers of foreign architects work in the Paris and London offices of the leading strong ideas practices that we sampled.

The strong experience practices adopt a very different approach to export. The strong experience strategy is one that relies heavily on building up reputations for expertise in specific building types. Unlike the strong ideas practices, they do not claim to be able to build whatever the client wants, but to be able to match client needs with specific expertise acquired on previous projects. This is the predominant mode of architecture in most countries, yet it has a much lower profile than the strong ideas approach; the projects are not so frequently written up in the professional press; the practices are anonymous, typically being in the hands of a second or third generation of partners; the buildings are not an aesthetic statement in themselves, but more a solution to client operational needs. This is not in any sense a lesser form of architecture than that produced by strong ideas practices, but it is an architecture that has different objectives and different criteria for success. Once one moves beyond the hot-house of architectural reviews and architecture schools, it moves into focus as the more important mode of architectural practice both socially in terms of the wider public's experience of architecture and economically as the much larger market for architectural services.

Just as their marketing strategy at home relies on repeat commissions from satisfied clients, so strong experience practices usually enter foreign markets by following clients. For many clients, commissioning a practice that knows its needs, and can effectively deliver buildings that meet those needs, is one of the most important reasons for retaining the domestic practice abroad. In order to work abroad, these practices more enthusiastically seek alliances with local firms in order to ensure that the building complies with local regulations and to manage relations with the contractor. This strategy of temporary association was still very much the predominant mode amongst strong experience practices; however, in a small number of strong experience practices we found the elaboration of an explicitly European strategy for architectural practice.

These European strategies took three forms — the establishment of alliance networks, the establishment of subsidiaries, and the formation of associations. Some English practices have an explicit strategy of establishing an alliance network with links to a number of European countries which would allow them to offer a pan-European service to internationally mobile clients, and to offer their particular expertise in specific building types to clients in foreign countries. Alliances in these networks typically took the form of joint ventures with local firms in each country, although subsidiaries were also established. Where firms saw that a particular foreign market offered a number of opportunities, they may choose to establish a subsidiary — two British practices had done this in Paris on the prospects of continuing workload from a particular client, and had then gone on to win commissions from French clients. The third strategy is the European association, such as Eurarc, analyzed by Prost (1997). These are clearly distinguished from the alliance network — in the former, the relationship between the practices is one of equals, while in the latter, the core practice is dominant and relationships are not symmetrical. Indeed, some respondents informed us that they actively avoided associating with practices of an equal standing in the other country, because there was a risk that they could become competitors.

There was a notable difference between the British and French practices interviewed with regard to their European strategies. No French practice had attempted either to form an alliance network or to establish a subsidiary in either the United Kingdom or Germany; the four that had any sort of European strategy restricted themselves to associations. Eight British practices had formed alliance networks or opened subsidiary offices in either France or Germany, while a further four were part of associations. In this sense, the English practices could be considered much more European than their French counterparts. However, the English Europeanization strategy had not been very successful — many practices, faced with a domestic recession, had turned to continental Europe for work, but the subsequent onset of the continental recession had meant that their plans for extensive continental work were disrupted, particularly in Germany.

Whatever the temporary economic problems facing the construction of alliance networks and opening subsidiaries, they do at least offer a viable means of Europeanizing architectural practice. Our research shows that associations did not offer such an effective means. The problem with European associations is that they do not extend the market and improve access to clients. Each national member tends to guard its own clients, meaning that market entry is not facilitated for the foreign members; unless the different members of the network have complementary skills, then they offer little value added. In an architectural culture of generalism rather than specialism, they seem unlikely to offer a way forward.

UNDERSTANDING DIFFERENCES IN PERFORMANCE

Much of the argument has turned on the notion of competence in specific building types. This competence is very much a design competence — the ability to configure space and form to effectively meet the client's operational requirements. It is built up through specializing and thereby obtaining repeated commissions for particular building types. Project management capabilities are not what distinguish the strong experience practice from the strong ideas practice — both strategies require high grade project management capabilities to meet the challenge of project complexity. It is here that size and age of practice can offer competitive advantage — the larger the practice the more frequently it will be able to design similar building types and the greater the opportunity for learning. The ability to pass the practice from one generation to another means that the learning is more easily retained and the client base nurtured. Larger size also means that practices can more easily bear the greater risks of working abroad.

As Linder (1994) shows, competitive success in international construction markets is based upon developing expertise in advanced building types which are then required in other countries. This success has two components — first a domestic demand for advanced building types; second the ability of domestic firms to capture the expertise developed in meeting that demand and then to sell it in export markets. Thus, as Porter (1990) has shown more generally for the competitive advantage of nations, it is the market conditions in the home country which are the biggest determinants of export success. We have shown from our research that French architectural practices are significantly less successful at exporting architectural services than their English counterparts. The answers lie, we suggest, with differences in the context of architectural practice in Britain and France.

There is not the space here to develop fully the key differences between the two business systems as they affect architectural practice in the two countries. These broader differences between the construction business systems in France and the UK, together with a conceptual framework for the analysis of such systems, are presented in the special issue of *Building Research and Information* (2/29/2000) devoted to Construction Business Systems in the European Union, to which the reader should refer in support of the summary points made here. These issues are also central to the program of research presently being undertaken by the Réseau Activités et Métiers de l'Architecture et de l'Urbanisme. An empirical comparison of the relationship between architects and contractors in the two countries is provided in Winch and Campagnac (1995).

The principal issue for French architectural practices so far as exports are concerned is that they are trying to compete in the smaller and much more difficult part of the world market — the strong ideas market. The efforts of British practices are much more evenly spread across the two markets, and they have a much stronger presence in the larger strong experience market than the French. Trying to win international architectural competitions is a very risky way of doing business, and very few firms make any kind of success doing it. A much less risky route abroad is to build up a strong relationship with a client and follow that client's international expansion. However, this begs the question of why the French prefer to follow the difficult, high risk strategy. We propose that it is due to the way in which the French domestic industry is organized.

It can be suggested that French architectural practices, in comparison to their British counterparts, are caught between two forces which limit their ability to generate competence in specific building types. The first is the system of *concours* which ruptures the relationship between the client and the architect. The process of briefing by which the architect learns what the client's needs are in detail is difficult to combine with the *concours* system. Solutions are proposed on the basis of relatively little information, and then cannot be adapted to any great extent as the architect acquires more information through briefing and concept design. This leads to a system where visually strong solutions are preferred, which favors the strong ideas strategy. Of course, the private sector is not bound by the *concours* system, but the very large role of the state in the French economy combined with the tendency of all but the most experienced private sector clients to follow public sectors procurement procedures means that its effects are pervasive. A side-effect of the *concours* system is the way it is used to fragment the national market by regionalizing the supply of architectural services. One factor aiding English practices firms in building up expertise and growing in size is that the market is national (i.e., England and Wales) rather than regional.

The second is the tendency of French architects to leave much of the detail design work to constructors' *bureaux d'études*. Firstly, this means that for a given value of construction work, French practices are much smaller than their English counterparts, and this restricts their export potential. Secondly, it means that French architects find it more difficult to acquire expertise in the practicalities of buildings. On matters such as choice of materials and finishes, structural technology, and the cost of alternative solutions, the architect must typically defer to the constructor. French architects do not have the opportunity to design completely the building. While a British architect specifies how the building is to be, a French architect can only specify how the building is to look. The combination of these two forces encourages a formalism in French architecture where buildings are neither finely adapted to client's operational needs, nor innovative in their solution to architectural problems beyond the aesthetic.

CONCLUSION

The evidence, which we have presented here from interviews with 60 French and English architectural practices, is that the reason English practices are more successful in European and global markets is that they compete strongly by effectively utilizing both strong ideas and strong experience strategies. French practices, particularly if the two large public-sector organizations are excluded, are much more likely to choose strong ideas strategies. In effect, French practices tend to focus their efforts on the most fiercely competitive segment of the international market for architectural services, while English practices range more widely across different sub-markets. As a result, many more English practices successfully export architectural services than French ones.

These differences in strategies, we suggest, are rooted in institutional differences in the construction business systems in the two countries. Ponthier (1993) has argued that the French architect is the most protected in Europe, yet this protection generates weakness rather than strength. Because the basis of the architect's role in the French system is legally protected and clients are therefore obliged to hire them, and because they tend to be selected through concours which rupture the briefing process, French architectural practices have not developed high levels of skill in adding value for clients. Their English counterparts, whose clients will only hire them if they can add value to the project, have developed relatively well-defined competencies in specific building types which encourage clients to commission them for their overseas investment projects, and foreign clients to hire them if local architects cannot provide those competencies. The strong entry of US architectural practices into the British markets in new building types such as multi-use arena and large, fast-track office developments provides confirmation of this point. Outside the high-profile, but relatively small, market for "signature" buildings, we suggest that it is through the capturing and development of competence in innovative building types that the European and global market for architectural services will grow.

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