



# FAITH, HOPE AND BREXIT

Confidence is rising among the world's top architects, but politics has a nasty habit of getting in the way

The results from the 2018 survey of the world's top 100 architectural practices reveal a mixed picture. On purely numerical terms, the profession has declined for the second year running, the number of architects employed by the top 100 dropping by 2.7%. Once again, the top 10 bucked the overall trend, with numbers rising by 0.8%.

There are no big surprises among the top 10 - Gensler, Nikken Sekkei and AECOM remain in the top three spots. HKS is the only newcomer in the super league, on the back of years of steadily increasing growth.

Among the top 10, HDR gained the most architects with a 14% increase, followed by AECOM which has started to reverse last year's dramatic drop of 609 architects with an 8% rise to 1,607, an increase it attributes to organic growth. AECOM has almost doubled its fee income in the space of a year and now takes more fees for purely architectural services than even the mighty Gensler.

At the other end of the scale, Aedas lost 10% of its architects, only remaining in the top 10 thanks to Woods Bagot dropping out of this year's survey.

Further down the list, there

have been some spectacular growth stories. BIG has leapfrogged from 89th place to 49 on the back of a 27% rise in architects employed, which reflects the firm's phenomenal success.

Despite the overall drop in numbers, architects are much more positive than last year. A healthy 76% believe there will be growth in the world construction economy compared with 60% in 2017. Architects put their confidence in the same countries as last year, with China at the top followed by the USA and India.

On a regional basis there has been a jump in confidence in the Pacific Rim, with 75% expecting to see growth compared to 64% last year. Faith in the USA's growth prospects is unchanged, but regionally there has been a dent in confidence in the North American construction economy, with a 10 percentage point fall in the number of architects predicting growth (66%).

A big change is the positive mood in Western Europe - 47% expect to see growth, a big increase from 28% last year. Unfortunately this new-found confidence doesn't include the UK. Only one global architect thinks Britain



**A BIG CHANGE IS THE POSITIVE MOOD IN WESTERN EUROPE, WITH 47% EXPECTING TO SEE GROWTH. UNFORTUNATELY THIS NEW-FOUND CONFIDENCE DOESN'T INCLUDE THE UK**

**THOMAS LANE, BD EDITOR**

offers the most potential growth for architectural services. The uncertainty around Brexit is a big factor - the latest RIBA survey reveals collapsing confidence about future work prospects among London architects, reflecting commercial clients' concerns that international firms may choose to relocate to mainland Europe, reducing the need for office space.

Increased confidence shows up again in recruitment intentions, with only one firm saying it had no plans to recruit during 2018. The number of firms expecting to hire over 50 architects was up from 10% to 13%, while those intending to hire 31-50 architects rose from 13% to 18%. Architects are also keen to retain staff - 54% have no plans to let any architects go over the next 12 months compared to 47% last year.

This is all good news but, as in the past two years, it is tempered by uncertainty. In early December the International Monetary Fund warned that the Chinese economy was dependent on dangerous levels of debt, comparing it to the USA before the 2007 crash. The outcome of the Brexit talks is highly uncertain and President Trump's reputation for unpredictability remains undimmed, with his recent recognition of Jerusalem as Israel's capital threatening to plunge the Middle East into yet deeper chaos.

Against this background, those practices that are most diverse in the work and markets they operate in are best placed to weather any storms that might blow in during the next 12 months.

## HOW THE CHARTS WERE COMPILED

The data for the rankings and tables in this publication was gathered by UK communications agency Camargue on behalf of BD. Details and listings are the results of a survey sent out to 1,250 architecture practices worldwide in October 2017 and analysed the following month. The listings contained within this publication are therefore based on declarations from the practices themselves.

### 2018 survey

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## HOW TO ACCESS THE WA100 2018 SURVEY

### ONLINE

BD subscribers will be able to access the survey at [worldarchitecture100.com](http://worldarchitecture100.com)

### PDF

A downloadable pdf of WA100 2018 is available to purchase online for £32.00 + VAT. Go to [bdonline.co.uk/wa-100/digital](http://bdonline.co.uk/wa-100/digital)

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**The big list** WA100 is BD's annual survey of the world's largest practices ranked by the number of fee-earning architects they employ. This year, the top five has a familiar look, while Leigh & Orange and blocher partners are the top new entries

RANK 2018	RANK 2017	NEW	PRACTICE NAME	COUNTRY	ARCHITECTS EMPLOYED	FEE INCOME (US \$MILLION)
1	1		Gensler	USA	2,560	\$1bn-1.5bn
2	2		Nikken Sekkei	Japan	1,837	\$500-599m
3	3		AECOM	USA	1,607	\$600-699m
4	5		HDR	USA	1,224	\$350-359m
5	4		Perkins+Will	USA	1,096	\$500-599m
6	6		IBI Group	Canada	864	\$220-229m
7	8		HOK	USA	806	\$280-289m
8	10		DP Architects	Singapore	766	
9	12		HKS	USA	764	\$250-259m
10	9		Aedas	China	713	\$200-209m
11	13		White Arkitekter	Sweden	690	\$110-119m
12	15		Perkins Eastman	USA	680	\$170-179m
13	27		DLR Group	USA	679	\$210-219m
14	14		Foster + Partners	UK	642	\$180-189m
15	16		Jacobs	USA	636	
16	26		CannonDesign	USA	620	\$140-149m
17	18=		Stantec	Canada	589	\$340-349m
18	20		SmithGroupJJR	USA	550	\$180-189m
19	21		Nihon Sekkei	Japan	528	\$120-129m
20	22		Heerim Architects & Planners	South Korea	518	\$150-159m
21	25		gmp architekten	Germany	512	\$80-89m
22	24		Haeahn Architecture	South Korea	509	\$90-99m
23	29		ATP architects engineers	Austria	440	\$80-89m
24	31		ZGF Architects	USA	392	\$90-99m
25	30		Kume Sekkei	Japan	390	\$100-109m
26	23		Tengbom	Sweden	383	\$70-79m
27	35=		NBBJ	USA	364	\$160-169m
28	34		P&T Architects and Engineers	China	357	\$130-139m
29	33		Atkins	UK	353	\$130-139m
30	35=		BDP	UK	350	\$60-69m
31	37		Mitsubishi Jisho Sekkei	Japan	347	\$150-159m
32	38		HPP Architekten	Germany	332	\$40-49m
33	43		LINK arkitektur	Norway	328	\$50-59m
34	32		AREP	France	316	\$120-129m
35		•	Leigh & Orange	China	302	\$70-79m
36	47		Kohn Pedersen Fox	USA	295	
37	39		KEO International Consultants	Kuwait	292	\$130-139m
38	56		EHAF Consulting Engineers	UAE	280	\$50-59m
39	44		Chapman Taylor	UK	272	\$40-49m
40=	45		Bates Smart Architects	Australia	260	\$50-59m
40=	61		Dennis Lau & Ng Chun Man Architects & Engineers	China	260	
42	41=		Dewan Architects + Engineers	UAE	257	\$60-69m
43	48		Aukett Swanke	UK	249	\$30-39m
44	18=		Kunwon Architects Planners Engineers	South Korea	248	\$110-119m
45	46		IDOM	Spain	245	\$50-59m
46	57		National Engineering Bureau	UAE	241	\$60-69m
47	49		Aidea	Philippines	240	\$10-19m

RANK 2018	RANK 2017	NEW	PRACTICE NAME	COUNTRY	ARCHITECTS EMPLOYED	FEE INCOME (US \$MILLION)
48		•	blocher partners	Germany	239	\$10-19m
49	89=		Bjarke Ingels Group	Denmark	224	\$40-49m
50	50		Ishimoto Architectural & Engineering Firm	Japan	219	\$70-79m
51	53		Allford Hall Monaghan Morris	UK	218	\$40-49m
52	62		B+H Architects	Canada	207	\$40-49m
53=	58		AXS Satow	Japan	203	\$70-79m
53=	54		Populous	USA	203	\$110-119m
55	71		GHDWoodhead	Australia	201	\$60-69m
56=	74		Lemay	Canada	200	\$60-69m
56=		•	RSP Architects Planners & Engineers	Singapore	200	
58	66=		DSP Design Associates	India	197	\$10-19m
59	59		Archetype Group	Vietnam	196	\$20-29m
60	51		Ronald Lu & Partners	China	193	\$50-59m
61	65		PBK	USA	187	\$90-99m
62	82		Itten+Brechbühl	Switzerland	181	\$40-49m
63	60		Wong Tung & Partners	China	179	\$50-59m
64	66=		GVA	Mexico	176	\$20-29m
65=	77=		Allies and Morrison	UK	175	\$40-49m
65=	77=		Corgan	USA	175	\$100-109m
67	70		Sheppard Robson	UK	172	\$30-39m
68	64		Jaspers-Eyers Architects	Belgium	170	\$20-29m
69	75		Valode et Pistre Architectes	France	167	\$30-39m
70	73		Wilmotte & Associes	France	166	\$30-39m
71	55		The Buchan Group	Australia	159	\$40-49m
72		•	SSH	Bahrain	157	\$90-99m
73	72		CF Møller	Denmark	152	\$40-49m
74	77=		Page	USA	147	\$120-129m
75=	66=		Broadway Malyan	UK	144	\$70-79m
75=	81		Henning Larsen	Denmark	144	\$40-49m
77	98=		Nordic Office of Architecture	Norway	141	\$20-29m
78=	84		CP Kukreja Architects	India	140	\$5-9m
78=	76		UNStudio	Netherlands	140	\$20-29m
80=	52		Leo A Daly	USA	139	\$180-189m
80=	85=		MG2	USA	139	\$50-59m
82	80		AHR	UK	133	\$20-29m
83	88		Purcell	UK	132	\$20-29m
84		•	GF & Partners	Philippines	131	Under \$5m
85	91		10 Design	China	129	\$30-39m
86	93		Progetto CMR	Italy	128	\$10-19m
87		•	schneider+schumacher	Germany	127	\$20-29m
88=	92		Feilden Clegg Bradley Studios	UK	117	\$20-29m
88=	83		Scott Brownrigg	UK	117	\$30-39m
90		•	Pascall+Watson	UK	114	\$20-29m
91		•	LWK & Partners	China	109	\$50-59m
92	100		Hames Sharley	Australia	102	\$20-29m
93=	95=		Henn	Germany	100	\$60-69m
93=	94		Showa Sekkei	Japan	100	
95		•	Saraiva + Associados	Portugal	97	\$20-29m
96		•	Boogertman+Partners Architects	South Africa	96	\$10-19m
97		•	Schmidt Hammer Lassen Architects	Denmark	94	\$10-19m
98		•	Richez Associés	France	91	\$10-19m
99		•	Gulf Consult	Kuwait	89	\$40-49m
100=		•	APA Wojciechowski	Poland	86	Under \$5m
100=		•	Make Architects	UK	86	\$20-29m
100=	87		Morphogenesis	India	86	\$5-9m