

Building Design.

Intelligence for Architects

WA 100 2022

THE WORLD'S LARGEST ARCHITECTURE PRACTICES **JANUARY 2022**





'WE'RE HIRING AND BUSY AS HELL'

"We've won more work in the past year than we ever have in the history of our practice." This is what it looks like at the top of the WA100, in the bullish words of the heads of Gensler and HDR, two of the biggest architects on the planet.

Listening to them, you would be forgiven for thinking that there had never been a global pandemic, nor that entire cities all over the world had been rendered ghost towns for months at a time. Cast your mind back to the bewildering spring of 2020 and it's a miracle that things are so rosy.

The numbers in this year's Top 100 have held remarkably firm compared with last year - and also with the edition before, which predates the pandemic. Of course there have been winners and losers, but overall the trend is stability through a period of exceptional rockiness. And the predictions for the year ahead are for growth, not stagnation.

The winners are mostly those firms with clients in North America and China, currently the hottest spots by far. As our regional tables reveal, both have been sewn up by local firms, although the US's Gensler managed to keep a toehold in the Pacific Rim, having increased its fee income there last year. It is the only non-Asian firm in that top 10 but, as co-CEO Andy Cohen tells David Blackman on the following pages, the secret is being seen as a local outfit.

It is not just China where Chinese firms are dominating. The second- and third-biggest

earners of architecture billings anywhere in the world last year were Chinese.

Arcplus Group and Tianhua are snapping at chart-topper Gensler's heels, and there are two further Chinese practices in that top 10.

Meanwhile Chinese architects led the culture, hospitality, retail and residential charts, with Tianhua almost doubling its income from housing in the last year. And this is despite a national real estate slowdown, a government crackdown and the collapse of property giant Evergrande.

The statistics underpin what has been becoming clear for a while now: China as a market for architectural services and development is maturing.

Only a few years ago everyone wanted a Zaha, a Foster or a Koolhaas and they were prepared to pay for the prestige those names conferred. Then local design institutes, with which foreign architects are compelled to work, began offering their own versions of the stars' work but were often ridiculed - or sued.

"Now there's a lot more holistic thinking going on there about how cities work," says Jeremy Farrington, who heads up BDP's Singapore studio. "There was a time when you could metaphorically wave the union flag and it was real kudos for the client.

"Those days are gone. It's a lot more competitive. The local design institutes are now much more sophisticated, with a lot of skills and strategic hires. The question

we are firmly asked now is: How are you different? Why should I work with you?"

One answer that western firms may be able to offer is their expertise in retrofit. Most of China's vast 500 billion m² stock of existing buildings is energy inefficient. Interest in repurposing buildings - even entire city centres - to be greener in both carbon and literal terms is growing fast.

It is an area in which British architects and other consultants excel, and it would be good news for us all if those skills could be

THE WINNERS ARE MOSTLY THOSE FIRMS WITH CLIENTS IN NORTH AMERICA AND CHINA, CURRENTLY THE HOTTEST SPOTS ... BOTH REGIONS HAVE BEEN SEWN UP BY LOCAL FIRMS

employed to help developments in every part of the globe be truly net zero.

"Net zero" is a slippery term, thanks to a lack of agreement on definitions - let alone regulation - but is a crucial one for our survival. In the UK, industry is ahead of the government in setting its own targets for embodied carbon - a bigger factor as energy supplies are electrified - but that is not the case everywhere in the world.

"There is a lot of inferred kudos from calling a project 'net zero' but in Asia clients often don't

understand what it means.

A scheme may start with an aspiration to be LEED Platinum but, when the concept unravels, it ends up being whatever they can get away with," says one architect on the ground.

This presents an opportunity for experienced practices to present themselves as specialists both in the technical side of net zero and in guiding clients through the jargon with compelling narratives that will keep all parties on board. That ability to see the bigger picture, coupled with their creativity, could help architects to regain their historic place at the head of the consultant team.

With Brexit and coronavirus continuing to disrupt supply chains, finding new income streams may prove a lifeline. Reports of materials and labour shortages leading to almost overnight price hikes of as much as 40% are not uncommon, with implications for fees and design quality. And covid may yet have further twists up its sleeve.

We need to be one step ahead, and that could well accelerate the use of design for manufacture and assembly, with its appealing level of certainty.

We will also begin to see greater deployment of drones. It is early days, but firms in China have begun to experiment with their use to build facades. Perhaps it is only a matter of time before chief executives are telling us: "We're buying drones and busy as hell." Don't get left behind.

Elizabeth Hopkirk, WA100 editor

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 Building Design. Details and listings are the results of a survey sent out to over 1,000 architecture practices worldwide in September and October 2021 and analysed the following month. The listings contained within this publication are therefore based on declarations from the practices themselves.

2023 survey To take part in next year's survey, contact Heidi Harris or Luke Aldridge: worldarchitecture@camargue.uk | +44 (0) 1242 577 277

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BOOMING BACK

Optimism is strong, at least for the US and Western Europe, where big firms are vying to woo staff - but China has become a tough market for outsiders, reports David Blackman

While the world's emergence from the coronavirus pandemic continues to be uncertain, top architects clearly feel the worst is over. Nearly three-quarters (73%) of architects surveyed for the annual WA100 report believe that the global construction economy will grow in 2022, with just 2% anticipating decline.

This compares with last year's survey, when just 24% expected growth, and is the most bullish finding since 2017's exercise.

The geopolitical shocks of the last 18 months have also had an impact on the upper echelons of the WA100 table. After years of domination by the US-based megafirms, the top 20 list of global architecture practices has a more East Asian flavour than over the last decade.

Japan's Nikken Sekkei, until now the only firm to fly the flag for Asia in the WA100's top five, has been joined by Chinese practice Zhubo. Other new names in the top 20 are Singapore's Surbana Jurong and Shanghai's Tianhua.

The growing prominence of East Asian practices reflects a confluence of several different trends, some related to the pandemic and others reflecting longer-term trends.

Restricted access to China

The decision by China to shut its borders to the outside world during the pandemic means that it has become much harder for overseas-based practices to serve clients in the country. "Practices' ability or willingness to travel to places like China has arguably diminished," says Doug Wignall, president of HDR.

Ulla Bergström, CEO of architecture for Sweco in the multidisciplinary giant's Swedish home market, says: "There have been difficulties working in Asia and China because of the restrictions. It is important for us to be on site and work locally, which has been impossible in some countries."

Hong Kong-based Aedas has benefited from China's self-imposed isolation, which remains largely in place more than 18 months on from the pandemic's onset, says company chairman Keith Griffiths.

Lack of face-to-face access has led to a "collapse" in European and North American »

Offices under construction in November 2021 in the Nine Elms district of Vauxhall, south-west London

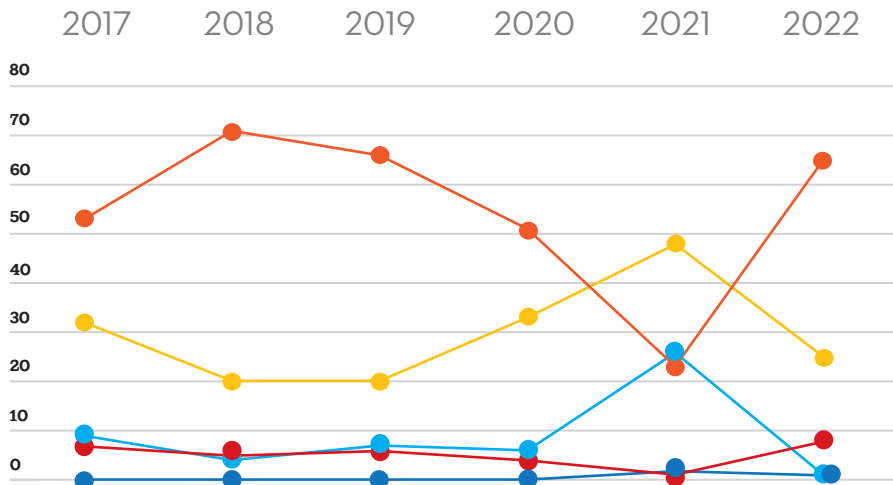


What are your feelings about the health of the global construction economy over the next 12 months?

These responses have been tracked over the past six years

KEY

- Strong growth
- Growth
- Stagnation
- Decline
- Strong decline



73%

of survey respondents predict global growth in construction this year, up from 24% a year ago

63%

of respondents predict growth in Western Europe

86%

predict growth in North American construction, the highest proportion for any region since 2018

» practices' share of the Chinese market over the past 18 months, he says: "International architects are not able to get into China, so they are not competing against us any more."

"Clients are happy to work electronically, but after months they really need to see their architects. We are in a favourable position because we have four mainland offices and 16 design directors."

"Even though the Hong Kong office is very rarely able to travel into China, we are able to do our work using mainland teams. Where Zoom isn't possible, we have taken key competencies from the Hong Kong office into China," he says, adding that the practice now has nearly 800 architects employed on mainland China projects, working either there or in Hong Kong.

Firms that have done well in China over the last year are those with design offices in the country, agrees Gensler co-CEO Andy Cohen. He says: "The pandemic prioritised the strength of being local before global. Many firms fly in and out, and you couldn't do that during covid. The strength of being

embedded in local communities has really panned out: Gensler is considered a local firm, not a western firm."

China's maturing home sector

The maturity and sophistication of China's home-grown architecture sector has helped the country's growing self-reliance in design services. Griffiths says the output from the country's local design institutes has improved "quite significantly", predicting that more of these outfits will break into the WA100 top 20 during the next two years.

And Chinese firms have more experience designing the transport-oriented developments that have become a strong feature of the country's urbanisation, he

INTERNATIONAL ARCHITECTS ARE NOT ABLE TO GET INTO CHINA, SO THEY ARE NOT COMPETING AGAINST US ANY MORE

KEITH GRIFFITHS, AEDAS

says - referring to the "extremely complex" high-rise and high-density developments, consisting of mixed-use multi-towers, often built over integrated mass transit and high-speed rail stations.

"China is designing and building unique buildings that don't exist anywhere else in the world," Griffiths says, adding that western architects lack experience in these particular types of schemes. "These very complex multi-tower developments above high-speed rail stations can only be dealt with by a big team in China."

The "soured" political relationship between the US and China has not helped either, says David Thom, IBI Group president.

Noting that the opportunities on offer are not as great as they have been in the recent past, HDR's Wignall agrees. "It seems as though relationships with China are strained for most of the world at the moment," he says.

Gensler's Cohen says: "Local firms have got much smarter and better, but clients still want a high-end touch." Consequently, he is confident that multinational architects will continue to have a role in China.

And they will be keen to do so, given the continued strong confidence about the prospects for growth in the world's second-biggest economy. Far more respondents to the WA100 survey (26) named China as the country with the best growth potential for architectural services than any other, outnumbering the US (13) by a margin of two to one.

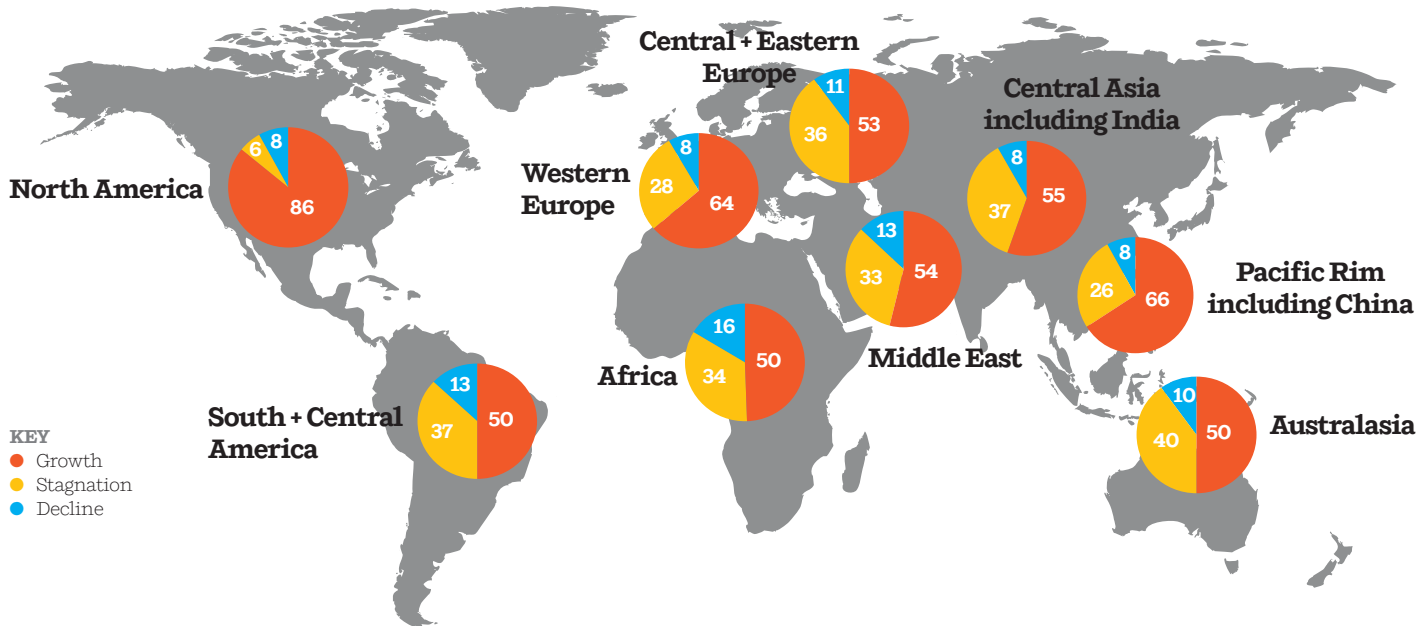
In addition, two-thirds of respondents (66%) expect the Pacific Rim's construction economy to see growth during the next 12 months, the second most bullish reading for any region.

Even the oft-reported troubles that have befallen Chinese residential mega-developer Evergrande will serve largely only to refocus investment towards other building types such as infrastructure and offices, says Griffiths.

Confidence in North America

North American practices can draw more immediate succour from the high confidence surrounding the prospects for their own region. Around six in seven (86%) surveyed practices predict either growth or strong

What are your feelings about the health of the construction economy in different regions in the next 12 months?



growth in the North American construction economy over the next year, the highest proportion recorded by WA100 for any region since 2018's survey.

The markets in the US and Canada are both "incredibly active", says Wignall: "It is probably the most active since pre-global financial crisis - probably as active as in those years prior to 2007-08." Cohen says that "the phones are ringing off the hook" as projects come off hold, adding: "Everyone sees this as the next bull run."

IBI's Thom is more cautious, suspecting that the optimism about growth over the next year may be as exaggerated as the gloom that engulfed sentiment in 2020. "The government is spending money like crazy to get themselves through covid, and that will come home to roost," he says, pointing to president Joe Biden's struggle to

THE PHONES ARE RINGING OFF THE HOOK ... EVERYONE SEES THIS AS THE NEXT BULL RUN
ANDY COHEN, GENSLER

get his infrastructure bill through Congress as a warning sign.

"That's a signal that there could be trouble ahead," he warns. The US\$1.2tn deal was finally passed into law in late November but nonetheless will not be the solution for "all the ills" of the US economy post pandemic, Thom predicts.

Europe setting the agenda

This general mood of optimism seems to be infectious, spreading across the Atlantic to Western Europe where sentiment has picked up markedly after years of stagnation in the wake of the global financial crisis and the Eurozone debt crisis.

Nearly two-thirds of WA100 respondents (63.3%) expect to see growth in the Western European construction economy over the next 12 months, and just 8% predict a decline. Thom, whose company is active in Europe, agrees that this bullish outlook is justified. "Europe is pretty strong outside the UK," he says.

Like in North America, the most active European markets are health and technology, says Wignall. Meanwhile, Western

Europe is setting the agenda in the field of sustainability, says Cohen: "Europe is leading the way in climate change action, which is significant."

And what Bergstrom describes as "huge demand" for sustainability solutions in countries like China offers an opportunity for big European architects to restore their footing overseas once the current restrictions on mobility have eased, she says.

Less confidence elsewhere

Elsewhere across the globe, however, optimism is more muted, often reflecting the progress of efforts to tackle coronavirus. Just half (50%) of respondents expect to see growth in the African construction economy next year, and 35% anticipate stagnation.

Even in East Asia, the picture is less rosy outside China, says Griffiths, who describes South East Asia as "extremely quiet apart from Vietnam".

Another factor dimming confidence could be the extent to which economies have become cut off during the pandemic. In Australasia, which imposed some of the world's harshest travel bans

to prevent importation of the virus, just 50% expect growth in the next year.

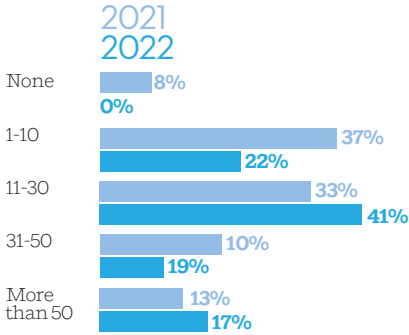
This gloomy outlook is unjustified, says Wignall, pointing to the pent-up demand in the country following the rolling lockdowns imposed during the last few months. Griffiths agrees, arguing that Australia will do "extraordinarily well" thanks to the amounts of cash that he sees flowing into the country.

Rising confidence worldwide is reflected in a strong upsurge in hiring intentions among firms surveyed for the 2022 WA100. Nearly half (46%) of practices expect not to let any architects go this year. None of those surveyed said they expect to hire no new architects in the coming year, with one in eight (17%) reporting that they expect to hire more than 50 this year.

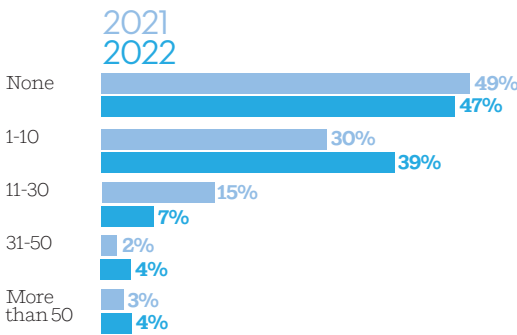
Hiring hurdles

Recruitment is an increasingly tough battleground, says Thom: "Keeping and hiring people is a real challenge. It's a big issue and it's relentless." Raids on staff by competitors are becoming increasingly "blatant", he adds: »

How many architects do you expect to be hiring over the next 12 months?



How many architects do you expect to let go over the next 12 months?



KEEPING AND HIRING PEOPLE IS A REAL CHALLENGE. IT'S A BIG ISSUE AND IT'S RELENTLESS

DOUG WIGNALL, HDR

» “The gloves are off.” IBI has 100 to 200 vacant positions despite having taken on 800 new staff during the pandemic.

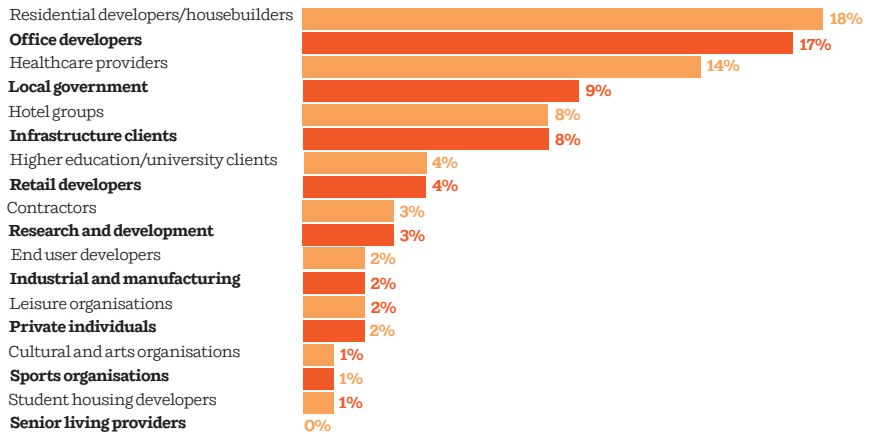
Like IBI, Wignall says HDR could easily take on a “couple of hundred” staff in North America, thanks to the amount of work the company currently has on its books. Describing the market for architectural talent as “super competitive”, he says: “Keeping employees is priority one; hiring them is number two - pretty much across the board.”

Gensler has recruited a total of 1,400 new architects since the onset of the pandemic last year. Until a few months ago the company was just replacing staff, but now it is larger than before the crisis, thanks to the scale of hiring over the last year, says Cohen.

Even the mighty Gensler is having to work hard to woo would-be recruits, he admits: “We believe our unique culture and global platform is attracting people to join our firm, but it is extremely challenging.”

Practices from across the WA100 will be hoping that things pan out next year as well as expected.

Who have been your best clients this year?



Which regions have provided most work in each sector?



The big list The WA100 is an annual survey of the world's largest practices ranked by the number of fee-earning architects they employ. This year there are a total of eight new entries, one leaping into second place, while first and third place are held by the same practices as last year

Entries with **RED** rankings are new this year

RANK 2022	RANK 2021	COMPANY NAME	COUNTRY	ARCHITECTS EMPLOYED	FEE INCOME (US\$)
1	1	Gensler	US	2,692	1bn-1.5bn
2	-	Zhubo Design	China	1,320	110m-119m
3	3	HDR	US	1,312	500m-599m
4	2	Nikken Sekkei	Japan	1,300	600m-699m
5	4	Sweco	Sweden	1,264	150m-159m
6	5	IBI Group	Canada	977	290m-299m
7	8	Perkins Eastman	US	793	270m-279m
8	6	Aedas	China	750	230m-239m
9	9	HKS	US	700	240m-249m
10	13	Haeahn Architecture	South Korea	697	120m-129m
11	10	Heerim Architects & Planners	South Korea	693	180m-189m
12	11	DLR Group	US	692	270m-279m
13	12	CannonDesign	US	670	180m-189m
14	-	Surbana Jurong	Singapore	639	100m-109m
15	= 51	Tianhua	China	587	400m-499m
16	14	ATP Architects Engineers	Austria	585	130m-139m
17	16	SmithGroup	US	584	210m-219m
18	18	Nihon Sekkei	Japan	560	160m-169m
19	15	Stantec	Canada	548	330m-339m
20	19	Arcplus Group	China	520	700m-799m
21	28	GMP Architekten	Germany	506	90m-99m
22	25	Foster + Partners	UK	502	240m-249m
23	23	ZGF Architects	US	495	140m-149m
24	24	HPP Architekten	Germany	487	60m-69m
25	26	White Arkitekter	Sweden	450	85m-90m
26	32	BDP	UK	448	90m-99m
27	22	HOK	US	447	270m-279m
28	20	NBBJ	US	443	220m-229m
= 29	-	Capol	China	429	280m-289m
= 29	27	Kume Sekkei	Japan	429	110m-119m
31	30	Mitsubishi Jisho Sekkei	Japan	410	180m-189m
32	31	LWK + Partners	China	408	110m-119m
33	-	Zaha Hadid Architects	UK	370	70m-79m
34	-	Azusa Sekkei	Japan	360	90m-99m
35	29	RSP	Singapore	357	50m-59m
36	34	Link Arkitektur	Norway	333	60m-69m
37	35	DLN Architects	China	332	
38	-	National Engineering Bureau	UAE	310	60m-69m
39	33	P&T Group	China	303	110m-119m
40	-	EHAF Consulting Engineers	UAE	300	70m-79m
41	43	Lemay	Canada	295	90m-99m
42	37	Allford Hall Monaghan Morris	UK	291	50m-59m
43	36	Kunwon	South Korea	283	120m-129m
44	39	Aidea	Philippines	280	5m-9m
45	58	Ronald Lu & Partners	China	279	60m-69m
46	38	Idom	Spain	278	50m-59m
47	41	PBK	US	274	170m-179m
48	42	Chapman Taylor	UK	273	40m-49m
49	40	Dewan Architects + Engineers	UAE	269	50m-59m
50	-	Heinle, Wischer und Partner	Germany	256	30m-39m



Tianhua designed a gymnasium and pool for Fujian Jian'ou First High School in Jian'ou City, Fujian. Sitting at the foot of Tianhu Mountain, it creates a visual focal point at the entrance to the campus and its form is inspired by two leaves

XIN JI

» by cities across North America, including Los Angeles and Toronto. And in response to IBI's clients' covid-related needs, it has created the Nspace workplace management app, which is designed to help issues of social distancing, health self-assessment and contact tracing.

↑ 7 PERKINS EASTMAN **US**
LAST RANKING 8 ARCHITECTS 793

Perkins Eastman bucked the trend that has seen many of its big US counterparts shed architects since last year, partly through a merger with New York- and Los Angeles-based Pfeiffer Partners.

The 37-member staff of Pfeiffer are leading key practice areas in the combined firm, including in the arts and libraries sector, where the smaller practice is particularly strong.

Perkins Eastman, which was founded in New York in 1981 - where the company's headquarters are still located - now has 22 studios across the world. The bulk of these are in North America, with offices also in Dubai, Guayaquil, Mumbai and Shanghai.

The practice's completions this year included Turkey's new 37-storey tall mission to the UN in New York.

↓ 8 AEDAS **CHINA**
LAST RANKING 6 ARCHITECTS 750

While the WA 100 survey shows that Aedas' overall headcount is slightly down, the company has expanded its mainland Chinese presence significantly in the past year,

especially in its Beijing and Shenzhen offices.

The original seven mainland design teams have more than doubled to 16, and the number of staff has grown by 36%.

The company's Shenzhen office alone has tripled in size to 120 people from 40, says company chairman Keith Griffiths.

The practice's ongoing projects include two transport-oriented developments in the cities of Chengdu and Dongguan.

But probably the practice's most ambitious project is the new city of projected population 2.5 million on which it is working in the valley between Hong Kong and Shenzhen, which ultimately aims to link the two cities together.

→ 9 HKS **US**
LAST RANKING 9 ARCHITECTS 700

Even though, like many other big US practices, HKS has shed architects over the past year, the Dallas-based firm has retained its position in the WA100 top10.

The company's strongest sectors in the last year have been healthcare, life sciences and residential/mixed use, while work in commercial, hospitality, education and aviation rebounded in 2021 after a slowdown in 2020.

Projects currently under way include the FBI Innovation Center at Huntsville, Alabama, which will be the first facility of its kind dedicated to cyber threat intelligence, data analytics and training to combat emerging threats.

HKS is also working on new hospitals in the Egyptian capital and in Jeddah, Saudi Arabia.

↑ 10 HAEAHN ARCHITECTURE **SOUTH KOREA**
LAST RANKING 13 ARCHITECTS 697

This year has seen Haeahn Architecture pip its fellow South Korean practice Heerim to take the number 10 slot in the WA100 by the slender margin of four architects.

Even though the Seoul-based practice closed its Qatar branch in Doha this year and opened no new offices, the number of architects it employs grew from 622 to 697.

The pandemic means that Haeahn's strongest performance in 2021 was in its home region of the Pacific Rim, but it hopes to achieve success in the Middle East market this year as the world returns to normal on the back of vaccination programmes.

The company's CEO is Sehan Yoon, who founded the company in 1990.

↓ 11 HEERIM ARCHITECTS & PLANNERS **SOUTH KOREA**
LAST RANKING 10 ARCHITECTS 693

The South Korean practice, which added another 33 architects during 2021, continues to work extensively internationally, with Vietnam a particularly strong market last year. Heerim opened a new office in Malaysia and has ambitions to work in the Philippines and Saudi Arabia. However, the practice has closed offices in New York, Kazakhstan and Uzbekistan.

Heerim works across many sectors but has been busiest in residential, offices and mixed use. Newly completed domestic projects include the Gwangmyeong U Planet cultural complex

and a mixed-use development at Pangyo Alphadom City 6-1 in Seongnam. Health projects include the Chungnam National University Hospital in Sejong, Korea. The practice has also strengthened its research and development in sustainable design.

↓ 12 DLR GROUP **US**
 LAST RANKING 11 ARCHITECTS 692

DLR added 36 architects in 2021 following the acquisition of four practices. The US company strengthened its expertise in the education sector, where it ranks second on fees, with the addition of BakerNowicki in San Diego and Bowie Gridley in Washington DC. Its healthcare capabilities were boosted with the addition of healthcare design firms Wright McGraw Beyer Architects in Charlotte and Salus Architecture in Seattle.

Projects include a masterplan to reimagine K-12 education in the US Virgin Islands, a number of timber office towers in North America, and the Dream Las Vegas hotel tower scheduled to complete in 2024. International projects include Medina Gate, a mixed-use pilgrimage development in Saudi Arabia.

At CannonDesign's Resnick Sustainability Resource Center for the California Institute of Technology, a timber-framed atrium houses social and collaborative spaces, while a swooping glass curtain wall lets natural light flood in



scientists, and has been working on several Museum of Tolerance projects for the Simon Wiesenthal Center including a mobile museum to fight hate and anti-Semitism.

In 2021 the practice hired its first ever director of diversity, equity and inclusion, Sharla Toller.

pandemic, it is helping clients in these sectors rethink the use of their spaces.

In late 2020 the group acquired UK environmental design consultant Atelier Ten to deepen its expertise in sustainability. This year it will complete its own new headquarters in Singapore, a net zero, very low energy campus.

↓ 13 CANNONDESIGN **US**
 LAST RANKING 12 ARCHITECTS 670

The growing US practice ranks third in the healthcare fees table, with recently completed projects including the Sheppard Pratt Mental and Behavioral Health Hospital in Maryland and the Penn State Health Hampden Medical Center.

Science and technology along with education are Cannon's other key sectors. It is designing the California Institute of Technology's Resnick Sustainability Resource Center, conceived as a timber-framed maker space for

14 SURBANA JURONG **SINGAPORE**
 RE-ENTRY ARCHITECTS 639

The Singapore-based urban, infrastructure and management services group has more than 16,000 employees, with constituent companies including SAA Architects in Singapore and the Sino-Sun design institute in China.

The healthcare sector continued to be a major focus for the practice in 2021, with SAA projects including phase two of the Health City Novena masterplan in Singapore. Although Surbana Jurong saw the hospitality, aviation and recreation sectors shrink due to the

↑ 15 TIANHUA **CHINA**
 LAST RANKING =51 ARCHITECTS 587

The Chinese practice's mainstay is the residential sector, where it tops the tables for fees. Ranked third in the Pacific Rim region, Tianhua opened four new offices last year, including one for the design of healthcare and elderly living provision.

As well as residential, it already works widely across other sectors, with projects including super-high offices and mixed-use developments in Wenzhou and Wuhan, the New Bund 31 Performing Arts Center in Shanghai and the Greenland International Expo city conference centre and hotel in Heilongjiang. Looking ahead, it is targeting work for the government and also in the science and technology and sports fields.

↓ 16 ATP ARCHITECTS ENGINEERS **AUSTRIA**
 LAST RANKING 14 ARCHITECTS 585

The Austrian practice continues to top the fee charts in Western Europe, traditionally its biggest region followed by Central and Eastern Europe. Its strongest sector is science and technology, with major projects including Europe's largest grain mill, GoodMills, at Krefeld in Germany, and the Ringana Campus cosmetics and life sciences plant in Austria.

ATP has launched its ATP Green Deal approach to climate-neutral and sustainable construction, with an emphasis on healthy, »



Aedas's Zhuhai Hengqin CRCC Plaza in Zhuhai, China, will be completed this year. The 200,720m² mixed-use complex features a signature sky bridge

» MIDDLE EAST

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	KEO International Consultants	Kuwait	156,260,000
2	Foster + Partners	UK	90,242,000
3	National Engineering Bureau	UAE	61,000,000
4	EHAF Consulting Engineers	UAE	59,250,000
5	Dewan Architects + Engineers	UAE	52,000,000
6	SSH	Bahrain	49,541,000
7	Gulf Consult	Kuwait	35,000,000
8	Gensler	US	25,730,643
9	Perkins Eastman	US	21,066,177
10	Aedas	China	17,490,000

PACIFIC RIM INCLUDING CHINA

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Arcplus Group	China	775,889,228
2	Nikken Sekkei	Japan	611,411,000
3	Tianhua	China	438,461,000
4	Capol	China	287,000,000
5	Aedas	China	207,120,000
6	Mitsubishi Jisho Sekkei	Japan	184,500,000
7	Heerim Architects & Planners	South Korea	173,800,000
8	Nihon Sekkei	Japan	160,616,000
9	Gensler	US	126,440,006
10	Haeahn Architecture	South Korea	125,237,157

MARKET SECTORS TOP 10

Project types

The top architecture practices in each market sector ranked by fee income

EDUCATION

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	PBK	US	165,000,000
2	DLR Group	US	122,560,000
3	Gensler	US	58,927,242
4	Perkins Eastman	US	57,288,856
5	CannonDesign	US	55,000,000
6	Arcplus Group	China	52,792,121
7	Stantec	Canada	49,917,209
8	SmithGroup	US	42,113,000
9	IBI Group	Canada	28,511,729
10	Corgan	US	26,800,000

CULTURE

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Arcplus Group	China	28,642,000
2	Nikken Sekkei	Japan	24,207,000
3	DLR Group	US	23,700,000
4	Gensler	US	17,173,634
5	Nihon Sekkei	Japan	15,039,000
6	Idom	Spain	15,000,000
7	Stantec	Canada	13,333,911
8	AXS Satow	Japan	11,600,000
9	Diamond Schmitt	Canada	11,030,000
10	GMP Architekten	Germany	9,500,000

ELDERLY LIVING

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Perkins Eastman	US	40,561,091
2	Page	US	16,411,410
3	Tianhua	China	8,410,000
4	Gensler	US	7,810,295
5	HDR	US	3,930,000
6	Nikken Sekkei	Japan	3,537,000
7	PRP	UK	3,312,000
8	P&T Group	China	3,249,950
9	Stantec	Canada	3,196,078
10	Leo A Daly	US	2,600,000

GOVERNMENT

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Gensler	US	52,578,322
2	HOK	US	43,000,000
3	GHDWoodhead	Australia	41,800,000
4	Page	US	38,293,290
5	Capol	China	36,730,000
6	DLR Group	US	35,200,000
7	Leo A Daly	US	25,805,803
8	Stantec	Canada	24,468,808
9	HDR	US	23,400,000
10	Perkins Eastman	US	17,345,243

HERITAGE

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Purcell	UK	19,100,000
2	Arcplus Group	China	12,565,687
3	BDP	UK	9,549,000
4	Wilmutte & Associés	France	8,800,000
5	Heinle, Wischer und Partner	Germany	5,250,000
6	Gensler	US	4,913,119
7	HOK	US	3,000,000
8	HPP Architekten	Germany	2,702,128
9	Lemay	Canada	2,000,000
10	IttenBrechtbühl	Switzerland	1,369,737

INFRASTRUCTURE

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	IBI Group	Canada	30,052,166
2	Arcplus Group	China	19,078,666
3	Nikken Sekkei	Japan	17,768,000
4	Idom	Spain	17,000,000
5	SSH	Bahrain	11,447,000
6	Capol	China	5,730,000
7	Aedas	China	4,748,000
8	GMP Architekten	Germany	4,500,000
9=	Gulf Consult	Canada	3,000,000
9=	Lemay	Kuwait	3,000,000

MIXED USE

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Arcplus Group	China	145,858,681
2	Gensler	US	106,011,482
3	Nikken Sekkei	Japan	85,269,000
4	KEO International Consultants	Kuwait	84,120,000
5	Aedas	China	66,380,000
6	IBI Group	Canada	45,676,467
7	Capol	China	42,650,000
8	LWK + Partners	China	35,500,000
9	Tianhua	China	34,885,600
10	Heerim Architects & Planners	South Korea	33,650,000

HEALTHCARE

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	HDR	US	298,670,000
2	HKS	US	124,969,352
3	CannonDesign	US	95,000,000
4	NBBJ	US	85,000,000
5	Stantec	Canada	82,359,667
6	SmithGroup	US	69,233,000
7	HOK	US	55,000,000
8	Perkins Eastman	US	48,277,853
9	Gensler	US	40,689,440
10	Arcplus Group	China	39,840,287

HOSPITALITY

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Aedas	China	74,224,000
2	Gensler	US	72,425,653
3	Nikken Sekkei	Japan	46,682,000
4	HKS	US	26,646,526
5	Dewan Architects + Engineers	UAE	24,000,000
6	Perkins Eastman	US	23,900,853
7	Arcplus Group	China	20,323,233
8	EHAF Consulting Engineers	UAE	14,500,000
9	National Engineering Bureau	UAE	14,000,000
10	Nihon Sekkei	Japan	13,343,000

MASTERPLANNING

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Nikken Sekkei	Japan	76,729,000
2	IBI Group	Canada	25,177,338
3	Gensler	US	21,264,264
4	Nihon Sekkei	Japan	20,238,000
5	Tianhua	China	15,468,000
6	SmithGroup	US	14,010,000
7	KEO International Consultants	Kuwait	13,640,000
8	HOK	US	13,000,000
9	P&T Group	China	10,711,250
10	Allies and Morrison	UK	10,289,646

OFFICES

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Gensler	US	544,770,971
2	Nikken Sekkei	Japan	215,813,000
3	Arcplus Group	China	161,910,992
4	NBBJ	US	120,000,000
5	Mitsubishi Jisho Sekkei	Japan	113,269,009
6	HKS	US	63,737,712
7	HOK	US	58,000,000
8	Nihon Sekkei	Japan	57,002,000
9	SmithGroup	US	49,045,000
10	DLR Group	US	43,000,000

SPECIALISMS TOP 10

Areas of expertise

The top architectural firms in each specialism ranked by fee income

CONSTRUCTION MANAGEMENT

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	PM Group	Ireland	123,600,000
2	EHAF Consulting Engineers	UAE	110,000,000
3	Heerim Architects & Planners	South Korea	77,100,000
4	KEO International Consultants	Kuwait	59,470,000
5	Kunwon	South Korea	53,452,685
6	Nikken Sekkei	Japan	44,539,000
7	SSH	Bahrain	35,187,000
8	National Engineering Bureau	UAE	20,000,000
9	Archetype Group	Vietnam	17,800,000
10	ATP Architects Engineers	Austria	17,500,000

ENGINEERING

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Stantec	Canada	1,976,871,183
2	PM Group	Ireland	146,400,000
3	Page	US	76,586,580
4	EHAF Consulting Engineers	UAE	75,000,000
5	HDR	US	67,652,000
6	DLR Group	US	62,300,000
7	SmithGroup	US	51,345,000
8	Nikken Sekkei	Japan	50,547,000
9	IBI Group	Canada	40,902,932
10	ATP Architects Engineers	Austria	39,000,000

FACILITIES MANAGEMENT

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	CannonDesign	US	11,000,000
2	Gensler	US	6,007,692
3	HOK	US	5,000,000
4	Nikken Sekkei	Japan	2,286,000
5	Lemay	Canada	2,000,000

ARCHITECTURE

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Gensler	US	572,699,306
2	Arcplus Group	China	513,685,323
3	Tianhua	China	425,200,000
4	Nikken Sekkei	Japan	351,993,000
5	HDR	US	319,005,200
6	Stantec	Canada	271,560,564
7	Capol	China	245,570,000
8	HKS	US	223,853,087
9	Aedas	China	211,844,000
10	Foster + Partners	UK	206,167,000

CONSULTING

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Gensler	US	87,623,560
2	Arcplus Group	China	65,759,659
3	Nikken Sekkei	Japan	41,258,000
4	Capol	China	33,590,000
5	Nihon Sekkei	Japan	16,533,000
6	HDR	US	15,612,000
7	IBI Group	Canada	13,879,484
8	ATP Architects Engineers	Austria	7,500,000
9	HKS	US	6,184,657
10	Page	US	5,470,470

ENVIRONMENT

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Stantec	Canada	448,165,727
2	Foster + Partners	UK	12,725,000
3	Arcplus Group	China	11,927,462
4	ATP Architects Engineers	Austria	5,500,000
5	IBI Group	Canada	5,173,769
6	Lemay	Canada	5,000,000
7	HOK	US	4,000,000
8	Zhubo Design	China	3,811,000
9	KEO International Consultants	Kuwait	2,660,000
10	Nihon Sekkei	Japan	2,296,000

INTERIOR DESIGN

RANK 2022	PRACTICE	COUNTRY	FEE INCOME US\$
1	Gensler	US	459,015,669
2	Perkins Eastman	US	100,955,925
3	HDR	US	72,856,000
4	NBBJ	US	72,000,000
5	Stantec	Canada	67,181,260
6	HOK	US	56,000,000
7	DLR Group	US	32,666,000
8	Arcplus Group	China	29,090,068
9	EHAF Consulting Engineers	UAE	23,250,000
10	HKS	US	20,606,105