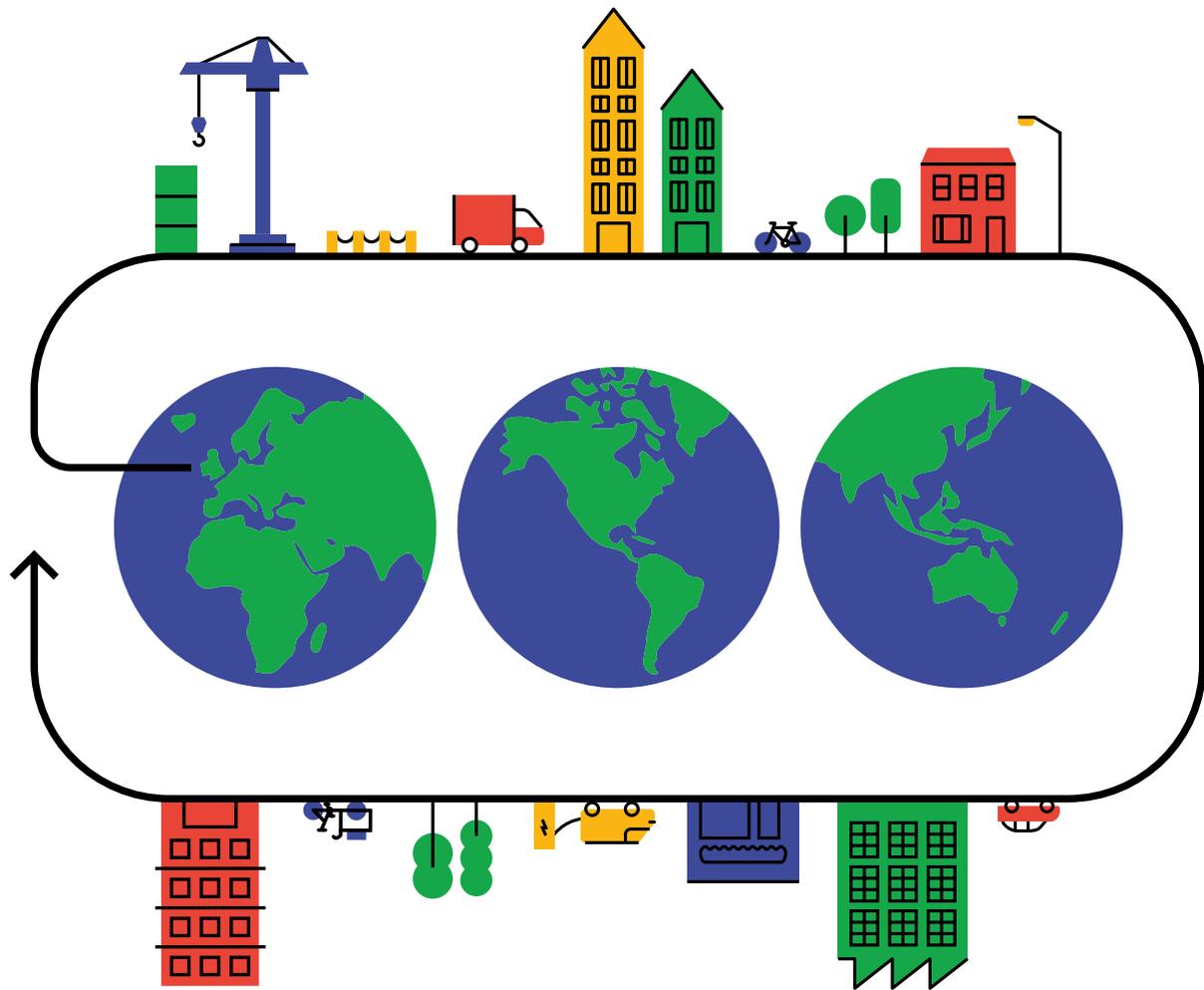


CONNECTED CAPITAL



LONDON AND THE WORLD'S BUILT ENVIRONMENT



In partnership with

GLAECONOMICS

CONNECTED CAPITAL
LONDON AND THE WORLD'S
BUILT ENVIRONMENT

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The Built Environment – a national growth sector

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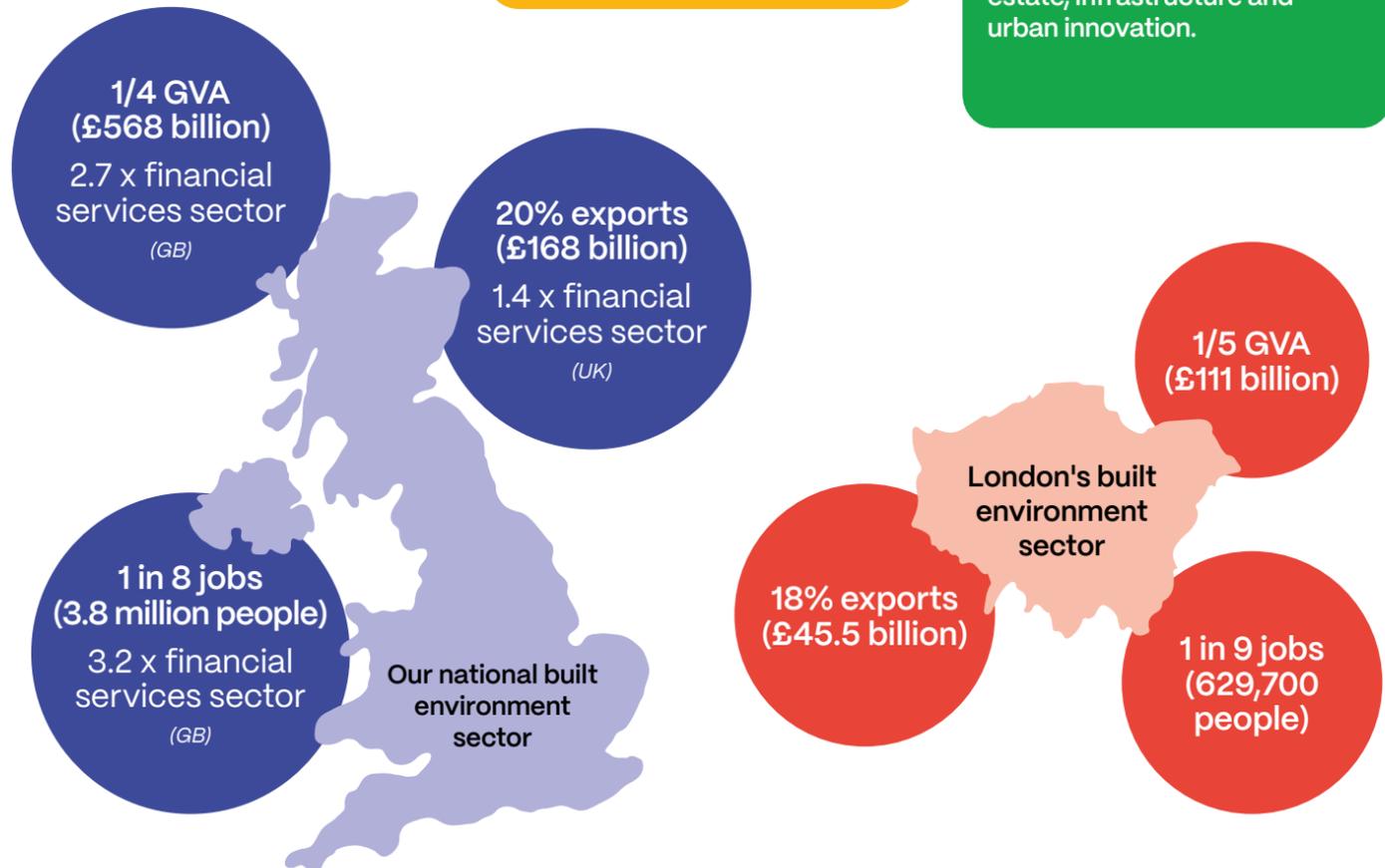
The built environment is one of the UK's most economically significant and globally competitive service sectors – yet it remains fragmented in policy and under-recognised in national strategy.

2

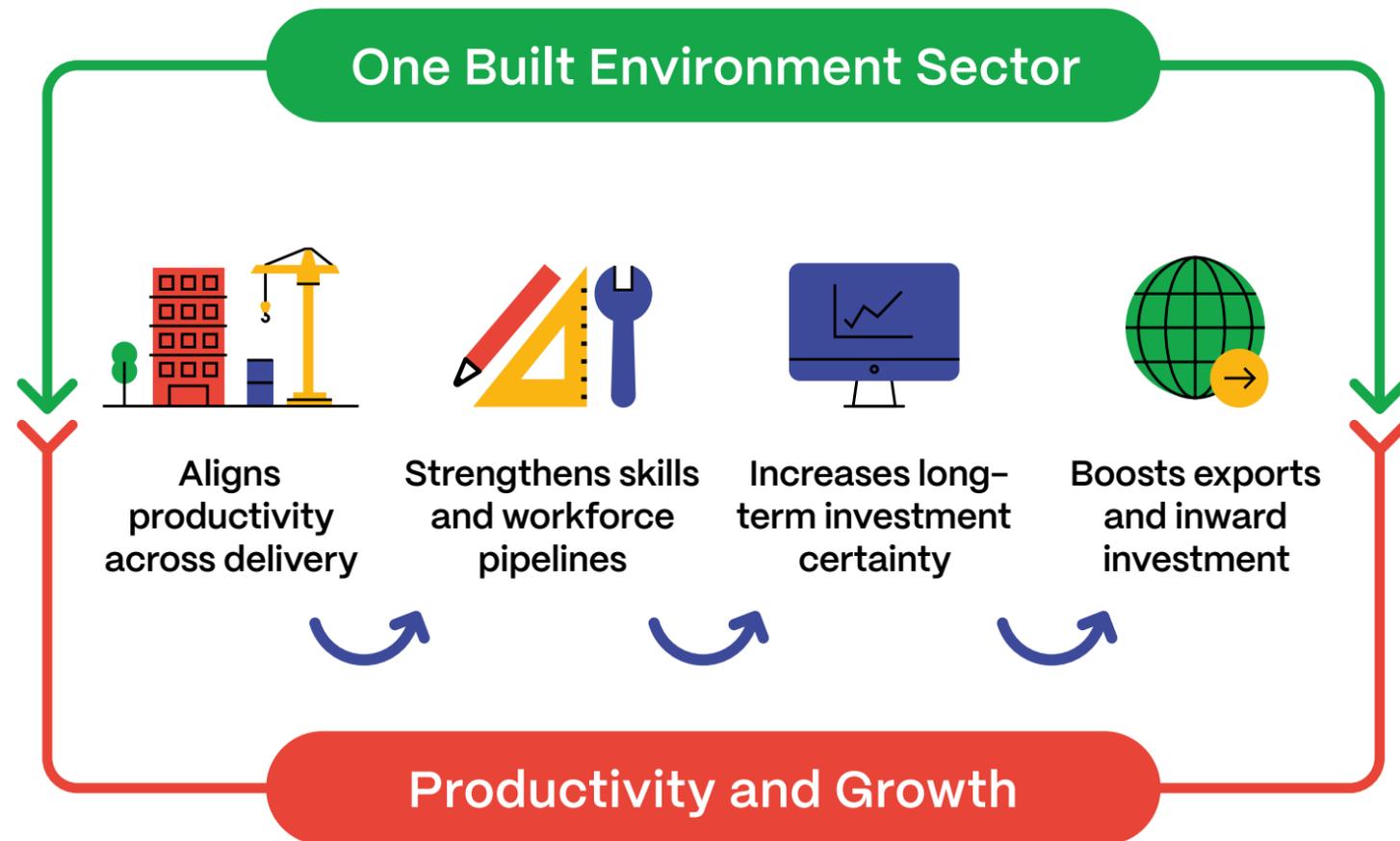
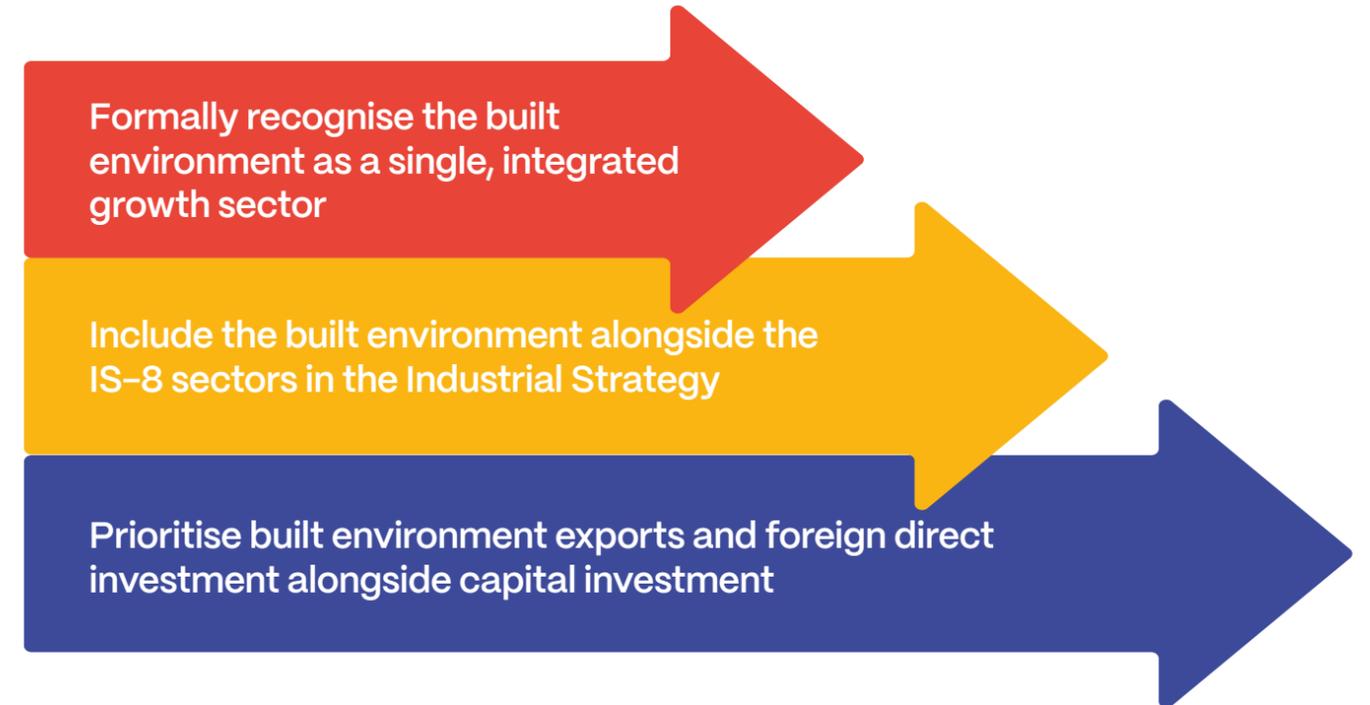
As one sector, the built environment contributes almost a quarter of national GVA (£568 billion) and employs 1 in 8 people, making it more than twice the size of the financial services sector by both output and employment. It is a major export engine, generating £168 billion annually – 20% of total UK exports.

3

London plays a critical national role as a global hub for city-making expertise, acting as the gateway through which capital, ideas and talent flow into the UK and onwards to global markets. This international leadership underpins the UK's reputation for excellence across architecture, engineering, planning, construction, real estate, infrastructure and urban innovation.



We are calling on UK government to:



INTRODUCTION

London's built environment sector is one of the capital's most significant assets. Its planning, design, engineering, development, and consultancy expertise shapes cities around the world, reinforcing the sector's role as a driver of economic growth, international influence, and export value for both London and the UK. London-based firms are delivering major projects across the globe, while international delegations continue to visit the capital to learn from its planning frameworks, governance models, and city-making approaches. Yet, despite this extensive global reach, the built environment is not consistently recognised as a defined export sector. This report aims to address that gap by clearly articulating the scale, distinctiveness, and international importance of London's built environment.

Alongside exporting expertise, London's built environment sector also acts as a critical gateway for global capital. It attracts long-term international investment into UK development, infrastructure, skills, and supply chains, with London frequently serving as the entry point through which overseas capital is deployed and then distributed across the national economy.

The NLA's recent publication, *The Built Environment Sector*, highlights the sheer scale of this contribution. The sector accounts for 24 per cent of Great Britain's total GVA (£568 billion) and employs 12 per cent of the national workforce (approximately 3.8 million people). It is one of the UK's most productive, globally engaged sectors, generating inward investment, supporting high-value jobs, and exporting British expertise worldwide. Recognising the built environment as a strategic export sector is therefore essential to unlocking its full potential within the government's wider economic growth agenda.

This publication forms part of a wider NLA campaign to strengthen London's global networks, promote its built environment leadership, and support the sector's contribution to national economic growth. Our report, *The Built Environment Sector* argues that the built environment should no longer be treated simply as an enabler of other industries but recognised as a high-growth sector in its own right within the UK's Industrial Strategy, infrastructure delivery programmes, and Local Growth Plans. Reframing the sector in this way would help unlock its full potential, enabling coordinated policy, taxation, education, and skills reform that reflects its true scale, strategic importance, and impact on everyday life. Metro Mayors are similarly encouraged to recognise the built environment as a priority sector in their regional growth strategies.

The built environment underpins the functioning of the UK economy. It shapes the places where innovation clusters emerge, where advanced industries grow, and where investment and talent flow. Responsibility for the sector is dispersed across multiple government departments, and the consequences are visible in persistent shortages across construction, planning, design, and low-carbon skills — precisely the capabilities required to deliver the UK's growth, productivity, and net-zero ambitions.

"Our report *The Built Environment Sector* argues that the built environment should no longer be treated simply as an enabler of other industries but recognised as a high-growth sector in its own right."

This report distinguishes between two closely related but distinct dynamics. First, London's role as a global centre of built environment expertise — acting as a platform through which skills, knowledge, capital, and professional services circulate internationally on behalf of the wider UK economy. Second, the national economic, social, and skills value generated by that global role, as investment, projects, and expertise anchored in London flow through supply chains, labour markets, and regional economies across the UK. The case studies are presented not as isolated examples, but as evidence of how London's international position translates into tangible benefits for places and people nationwide.

Following the insights from the NLA's publications *Skills for Places* and *The Built Environment Sector*, this report explores the international reach and export value of London's expertise.

Through data analysis and a showcase of global projects, this publication evidences London's leadership to international investors and policymakers while equipping the sector with a stronger narrative to articulate its value. In doing so, it reinforces London's role as a world-leading exporter of built environment expertise and as a global capital shaping the cities of the future.

"This publication reinforces London's role as a world-leading exporter of built environment expertise and as a global capital shaping the cities of the future."

- What makes London's built environment capabilities distinctive on the world stage?
- How can policymakers and industry better support the sector to grow its global impact?
- How can London strengthen its competitiveness, support firms to win international work, and strengthen the built environment as a defining element of its global identity?

LONDON AS A GLOBAL CENTRE OF CITY-MAKING EXPERTISE

London's role in global city-making is underpinned by a set of clear strengths: a large concentration of leading built environment firms and professional services, world-class universities, design talent shaped by dynamic cultural and creative industries, international transport links, and a track record of delivering complex projects.

"More than 30% of the world's top 100 architectural practices are based in London, far greater than any other city or country in the world."

London's built environment sector has earned global recognition through a long accumulation of design leadership, a deep pool of skilled professionals, and a reputation for creative, collaborative practice. The city benefits from structural advantages that make it a natural international hub: its widespread use of English, its time zone alignment with European, US East Coast, African, and Middle Eastern markets, and its trusted legal, political, and financial systems. Together, these elements have shaped a distinctive international brand that draws in talent, investment, and partnerships, and positions London as one of the world's foremost centres for city-making expertise.¹

London's enduring strength lies in the depth and diversity of its ecosystem. It hosts one of the world's most international populations, a dense network of built environment firms, and globally respected academic institutions specialising in architecture, planning, engineering, sustainability, and urban economics. Its cultural offering and creative industries fuel cross-disciplinary thinking and experimentation, making the city a magnet for ideas and talent. Extensive transport links by air, rail, and sea give London unmatched global connectivity, supporting a thriving export market.

Although London serves as the UK's global gateway for built environment expertise, it forms part of a much wider national ecosystem. Cities such as Manchester, Glasgow, Leeds, and Birmingham host significant clusters of design, construction, engineering, and regeneration specialists. In Greater Manchester alone, the built environment accounts for 21 per cent of regional GVA and 11 per cent of employment, underscoring the depth of capability across the country.² What distinguishes London is its global reach — its concentration of architectural, engineering, and financial services, including 43 per cent of Britain's architectural jobs. London acts as a national platform through which UK firms of all sizes access global markets and attract inward investment.³ In this sense, London's international position strengthens and amplifies regional centres by opening routes to capital, clients, and markets that would otherwise be harder to access, attracting investment that circulates back through the national economy.



Exporting London sustainability-led masterplanning and regeneration expertise to Baku, Azerbaijan. Sea Breeze Masterplan completion due 2033. © Scott Brownrigg

As a design capital, London competes at the highest international level. More than 30 per cent of the world's top 100 architectural practices are based in London, far greater than any other city or country in the world.⁴ The built environment sector is reinforced by its interdependency with London's financial and professional services industries, which generate more than double the national average output per person.⁵ This proximity to finance, investment, insurance, and legal expertise enables London's built environment firms to operate at scale, structure complex international deals, and deliver major city-shaping projects around the world. The clustering effect created by these interlinked industries is one of London's defining advantages and a key driver of inward investment.



Showcasing London expertise in adaptive reuse, transit-oriented mixed-use development in Toronto, Canada. 2150 Lake Shore completion due 2055. © Allies and Morrison

London's inherent dynamism is also a major asset. "London has legacy, history, layers," says Duncan Swinhoe, Co-Managing Director for Gensler Europe. "When you travel the world, see what else is out there, and then come back to London, it's a real 'wow' moment — you realise what we have here. We should celebrate that and be confident in how we present it to the rest of the world."

As one of the most complex urban environments in the world, the city faces constant pressure to adapt — whether responding to population growth, climate challenges, changing land uses, or evolving community expectations. According to Stephen O'Malley, Chief Executive of Civic, "London doesn't have the option to stand still." Its intensity and high land values create a context where built environment professionals must innovate, experiment, and take calculated risks in dialogue with communities. This environment generates a culture of problem-solving that becomes directly transferable to other UK and international cities. As O'Malley notes, lessons tested in London's "uber-urban" conditions help address challenges in cities such as Manchester, Glasgow, Leeds, and Birmingham, demonstrating the national value of London-developed approaches.



Sustainability-led workplace design applied within Singapore's One-North innovation district. Eric Parry Architects' Wilmar Headquarters, completed in 2021. © Fabian Ong



The Henderson demonstrates collaboration between teams in London, China and Hong Kong to replace a former car park with an office tower, delivered through advanced digital modelling in Hong Kong. Completed in 2025. © Zaha Hadid Architects

"This environment generates a culture of problem-solving that becomes directly transferable to other UK and international cities."

London is a place where everything is negotiated, co-created, and iterated, requiring practitioners to collaborate across disciplines and pilot new solutions to contemporary challenges. Dominic Papa, Co-founder of Studio Woodroffe Papa, observes that "the immense challenges that London presents have made our practice extraordinarily agile," generating a strikingly diverse portfolio and reinforcing the idea that "if you can do it in London, you can do it anywhere."

Together, these strengths form an ecosystem of PLACES — Planning, Landscape, Architecture, Construction, Engineering, and Surveying — unique among global cities. London's model is defined by design quality, sustainability leadership, digital and technical innovation, and collaborative working across public and private sectors. This distinctive approach to city-making is now exported worldwide, making "London expertise" synonymous with excellence in urban development and placemaking. It not only attracts global businesses and talent to the capital but also enables London-based firms to deliver services to major economies across the world.⁶

How London's professional services ecosystem drives global reach for UK firms

Savills is, says executive director David Williams FRICS, "the largest UK surveyor with the most inherent global presence," with nearly 10,000 staff in Britain out of over 42,000 worldwide. The firm's continued plans for expansion are "awe-inspiring," having grown at roughly 12 per cent per year since 2002.

Director Sophie Rosier adds that the UK business exceeded £1 billion of the firm's £2.4 billion turnover last year (2024). "These core UK capabilities and track record are empowering our global expansion radiating out from London where our expertise and our skills are so impressive."

Savills operates via overlapping regional boards—UK/EME, APAC, Americas, with a London HQ. But the most "radical phase of growth" is still ahead.

Why? Williams argues the firm's collaborative, globally entrepreneurial model is driving expansion: "We are inquisitive, collegiate hunters for major projects around the world and are privileged to have like-minded teams with an established range of skillsets all focused on generating significant long-term value for our clients and their developments." (Savills Global Development Consultancy is overseen by Co Director Jemma Aitken-Quack).

Rosier emphasises that Savills' people-centred culture "hasn't just suddenly happened overnight, but has been a distinct part of our evolution over the past 170 years from a traditional partnership to a PLC some 40 years ago."

This culture — "interwoven with the built environment in the best interest of clients" — rests as much on long-term advisory heritage as on financial results. "We are committed for the long term with our clients and on specific projects," Rosier says. "Trust, patience, and relationships underpin our growth and our ability to export UK expertise worldwide."

"Perhaps one of Savills' most powerful exports is our oversight of global real estate investment, much of which flows through and lands in London. We provide our clients with choice; specifically the ability to consider a broad spectrum of offers which best suit their risk profiles. Investment in long-term development although sometimes inappropriately considered to be on the edge of the risk curve, has undoubtedly been proven to deliver the ultimate long-term rewards for both surrounding communities and investors."

Working with, for example, the NLA and exporting this expertise and regeneration know-how, across our global cities is crucial for Savills, "particularly as some of the most accomplished global exemplars sit here in London," Rosier notes. Whether advising on Middle Eastern mega-projects or US City regeneration projects, teams worldwide "often ask for London involvement... because of what we have delivered, but also the collective knowledge we have, both at Savills but also from working alongside peers across the industry. London talent is a force."

"What remains extraordinary about London's real estate services sector, is that it's the most sought-after export, globally... we export at a premium our professional capabilities."

*David Williams FRICS,
Executive Director, Savills*



Savills manages over 2.7 billion square feet of real estate globally, finds homes for people across the world and is known for creating unusually deep client relationships with a low staff churn.

Williams calls London "the high altar of worship for regeneration," drawing welcome and constant study visits to King's Cross and inspiring peers in New York, London, Paris, Munich, and beyond. London acts as Savills' "anchor," Rosier says, with "invisible strings" connecting global teams and creating an "insatiable excitement" around collaboration.

Savills' ESG capabilities add further export strength. Savills Earth now includes 100 London-based specialists, while its investment arm manages £30 billion with ESG embedded in every discretionary decision. Savills' Greenfit bridges landlords and tenants "to find the pathway to carbon neutrality."

"What remains extraordinary about London's real estate services sector," Williams concludes, "is that it's the most sought-after export, globally... we export at a premium our professional capabilities." London's universities and entrepreneurial energy reinforce this leadership, though Rosier warns that global demand risks "export cannibalisation." London's success', she says, "are a privilege — but they have to be nurtured, refined and looked after constantly."

HOW DOES LONDON'S BUILT ENVIRONMENT SECTOR BENEFIT THE UK?

London's built environment sector drives UK growth by attracting international capital and acting as a gateway through which regional skills, firms and national supply chains access global opportunities. London amplifies regional capability, returning investment and productivity to the wider economy, anchoring long-term growth across cities and regions beyond the capital.

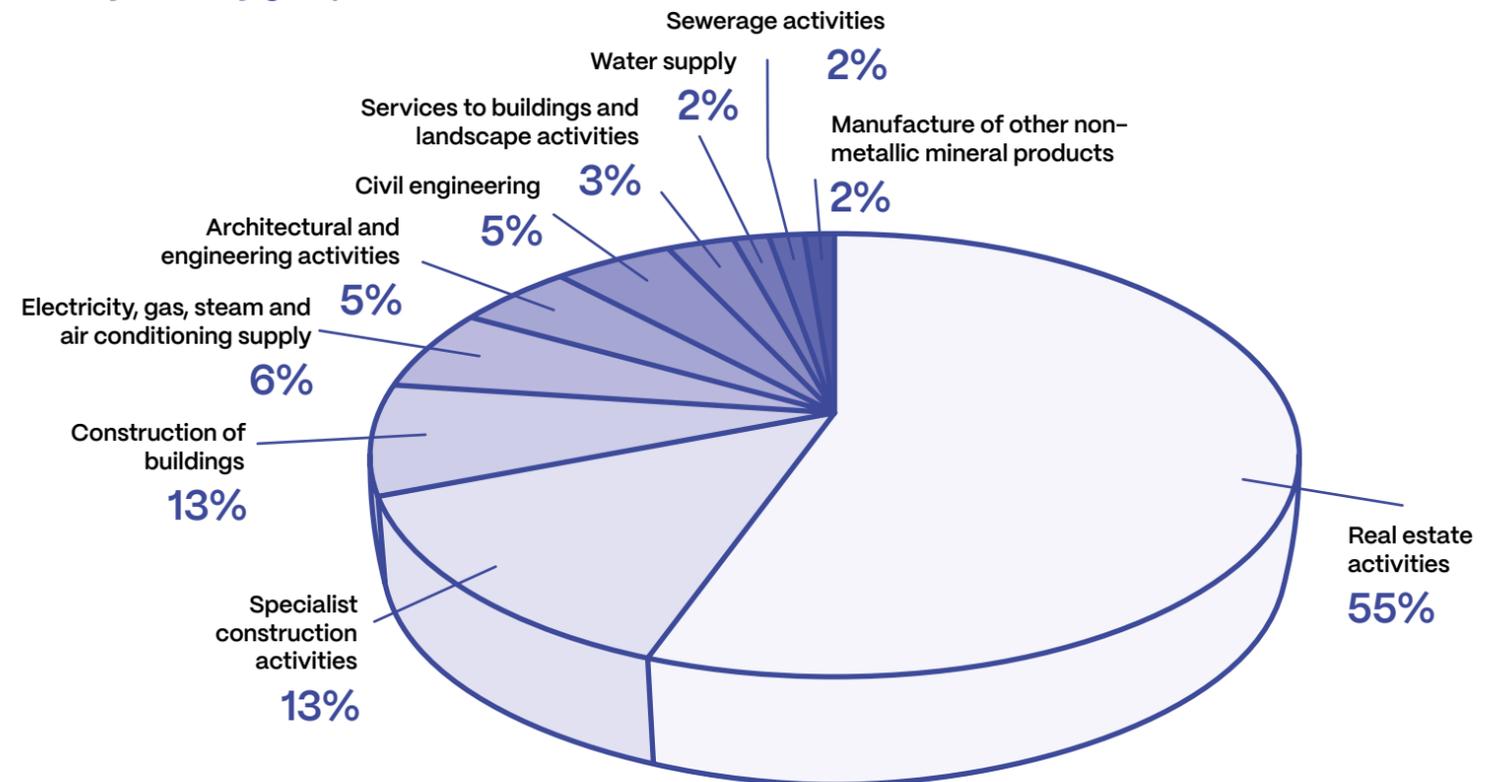
Economic contribution and visibility

London's role within the UK's built environment economy is best understood not as a competitor to regional centres, but as a platform through which UK-wide expertise connects to global markets. Capability in design, engineering, construction, and regeneration is distributed across cities and regions, from Manchester and Birmingham to Leeds, Glasgow, and beyond. What distinguishes London is its global connectivity, depth of capital markets, and concentration of professional services, which together create a gateway through which regional skills, firms, and supply chains can access international investment and opportunities. In this way, London's global role amplifies — rather than displaces — regional capability, feeding investment, jobs, skills development, and productivity back into the national economy.

London's built environment makes a major contribution to Britain's economic performance, shaping both national productivity and global activities. In 2023, the UK's built environment industry exported over £168 billion in goods and services — equivalent to 20 per cent of all UK exports that year. In comparison, financial services exports amounted to £89 billion the same year.⁷ Of this total, £45.5 billion was generated from London. Notably, almost 89 per cent of these exports were services, reflecting the high-value consultancy, design, engineering, financial, and professional expertise that London firms deliver globally.⁸

"In 2023, the UK's built environment industries exported over £168 billion in goods and services — equivalent to 20% of all UK exports that year."

The UK's Built Environment exports by industry group



Source: GLA Economics
For full GLA analysis see page 58.

Given its scale, the built environment is fundamental to the UK's growth ambitions. Many of the eight priority high-growth sectors (IS-8) in the government's Industrial Strategy – including clean energy, advanced manufacturing, creative industries, and digital technology – are deeply interconnected with the built environment. The London Growth Plan also identifies the built environment as a key driver of competitiveness, skills, inward investment, and export performance. Simply put: national and regional growth targets are difficult to achieve without the contributions of the built environment sector.⁹

Although London is the focal point for many major development projects, the city's built environment has a far wider national footprint, with economic, social, and skills benefits extending across the UK. Gardiner & Theobald's London-based teams routinely collaborate with regional supply chains, SMEs, and specialist consultancies, ensuring that large, complex projects create value far beyond the capital through employment, capability building, and local economic impact. Their London projects also act as test beds for new methodologies and digital tools that are later adopted across regional projects, raising capability and standards nationally while the company's early-career pathways – apprenticeships, graduate schemes, and year-out programmes – have provided more than 10,490 apprenticeship weeks across the UK since 2021.

The Earls Court redevelopment project is another example of London-based schemes that generate significant economic and social value across the UK, contributing directly to the London Growth Plan and to national priorities set out in the government's Industrial Strategy. Once delivered, the scheme is projected to add up to £3 billion in GVA annually, create around 12,000 on-site jobs, and support a further 23,500 positions across UK supply chains and knowledge networks, including up to 6,500 roles outside London. An 18-year construction programme, supported by an established on-site Skills Centre, will sustain up to 3,000 construction jobs and generate £340 million in economic impact each year, with local spend expected to rise by up to £75 million annually. The scheme is forecast to return £20 to the public purse for every £1 invested, demonstrating its exceptional value and nationwide impact.

The regeneration of King's Cross by Related Argent likewise demonstrates how major London projects can deliver sustained economic, skills, and supply-chain benefits across the UK. Widely recognised as an international exemplar of post-industrial regeneration, the programme has drawn on more than 1,500 suppliers over the past decade, with significant contract values extending well beyond London into the East of England and the North West. The wider economic ripple effect of London's built environment drives national growth in several ways:

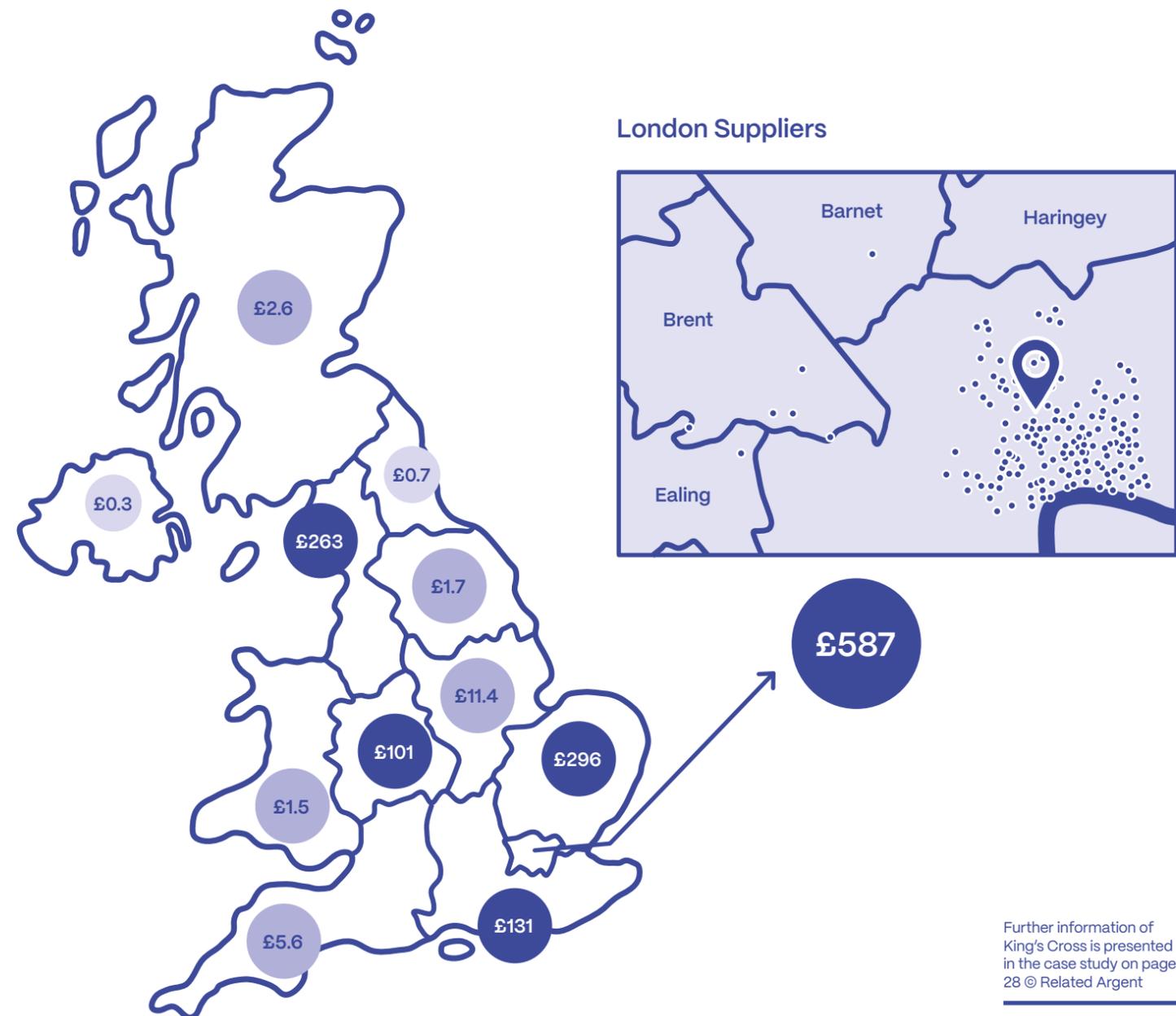
- High-value exports: London firms lead in design, architecture, engineering, project management, planning, sustainability, and financial structuring for global projects. These services generate export income, enhance Britain's reputation, and support international market access for other sectors.
- Investment flows: London attracts global capital for major developments that stimulate supply chains in construction, manufacturing, digital services, and materials across the UK.
- Innovation diffusion: The city acts as a "test bed" for new design approaches, sustainability technologies, digital tools, and regulatory innovations that are then adopted nationally.

"Given its scale, the built environment is fundamental to the UK's growth ambitions."

- Skills and talent pipeline: London's universities, research institutes, and professional networks develop talent that extends across the UK's regions.
- Resilient economic ecosystems: The city's close integration of finance, design, engineering, academic research, technology, and legal services creates a unique cluster effect that supports national competitiveness.

Together, these dynamics reinforce London's role not just as a global centre of city-making, but as a cornerstone of the UK's economic strategy – supporting jobs, exports, and innovation from Cornwall to the Highlands.

Development at King's Cross generates nationwide supply chain impact (£ million)



Further information of King's Cross is presented in the case study on page 28 © Related Argent

Investment and global capital

London remains one of the world's most attractive destinations for global investment. According to the EY UK Attractiveness Survey 2025, the capital is the leading European city for Foreign Direct Investment (FDI) and real estate investment.¹⁰ More than half of surveyed investors (52 per cent) planned to invest in the UK in the coming year, and of those, 52 per cent intended to invest specifically in London. This top ranking is courtesy of the city's deep financial markets, skilled talent base, stable legal environment, and reputation as a global centre for professional services. London's universities also play a role, as many international professionals maintain lasting ties to the city after studying here.¹¹

Real estate remains one of the most significant destinations for global capital. In 2023, London secured £11.2 billion in property investment, with overseas investors accounting for 61 per cent of this total. Much of this capital is committed over the long term, generating ongoing returns through rental income, asset appreciation, and regeneration-led value uplift.¹² London's transparency further strengthens investor confidence: the JLL Global Real Estate Transparency Index (GRETl) consistently places the city at or near the top worldwide. As Adam Challis, Global Director of Strategic Insights at JLL, notes, London's combination of transparency, liquidity, and market maturity makes it one of the most reliable locations for global capital in both buoyant and challenging market conditions.

London often serves as the entry point for international capital into the UK, including sovereign wealth funds. Research undertaken by the City of London Corporation indicates that these funds frequently establish their UK presence in the capital before expanding investment into other regions. As Katie Stewart, Executive Director of Environment at the City of London Corporation, explains, such investors often more than double their capital within five years, highlighting the strength of the market and the confidence placed in London as a secure starting point. After setting up, sovereign investors have collectively invested in 36 locations across the UK, including Aberdeen, Edinburgh, Manchester, Birmingham, and Reading.¹³ 48 per cent of the investment value comes from North America, followed by the European Union (27 per cent), and Asia Pacific (13 per cent).¹⁴

For many investors, London also represents a form of strategic risk mitigation. Pip Prongué, Executive Managing Director for Wates Residential, observes that London's global profile and perceived security make it especially attractive: "People know London. If an investment in London underperforms, you still own real estate in London. That familiarity and resilience are powerful. In contrast, smaller markets may not offer that same certainty." London's status as a world city therefore delivers both brand value and financial reassurance.

Investment flows are not limited to property. London's built environment sector is also attracting direct investment into UK firms and talent ecosystems. Recent examples include Goldman Sachs acquiring Mace's international growth arm, Dubai developer Arada taking a 75 per cent ownership of Regal, Abu Dhabi investing in London Square, and the Canadian-backed engineering giant Stantec expanding its UK presence. BDP, the UK's largest interdisciplinary design and engineering practice, continues to grow under the ownership of Japan's Nippon Koei. As NLA Chief Executive Nick McKeogh notes, these moves demonstrate that



Museum design and cultural placemaking expertise shaping Abu Dhabi's Zayed National Museum. Completed in 2025
© Nigel Young / Foster + Partners

investors are not only seeking British expertise for export, but also see untapped domestic opportunity in infrastructure, water systems, housing delivery, and climate-led development.

For Gardiner & Theobald, London's global status was an important factor in attracting investment from Canadian private investment firm Hennick & Co. Managing Partner Adam Glover reflects: "For investors, London remains a compelling base — internationally connected, trusted, and rich in expertise. From this platform, we can evolve and pursue sustainable growth across the UK and in priority international markets."

Katie Stewart emphasises that London is a highly attractive base for international firms, particularly those from the United States. As an English-speaking country and a gateway into Europe and beyond, London is "a very natural next step for those American companies." She notes that while the UK can be self-critical about planning or regulation, investors looking in from the outside consistently view English cities positively: the UK is a trusted brand, and London is recognised globally as a modern commercial legal centre. This reputation, combined with the city's exceptional connectivity, makes London a natural landing point for businesses establishing a European headquarters.

According to the NLA's global export survey of members:

82%

said that their global HQ was based in London

77%

are currently delivering live international projects from London

77%

of those delivering international projects say their international work has increased over the last five years

73%

of those delivering international projects expect their international workload to increase over the next five years

86%

of respondents not currently delivering work internationally are actively seeking international projects or investments

Answered by 56 businesses across the NLA membership

As Stewart puts it, "We're a unique environment. We're a global destination, but we've also got soul and character" — a combination that continues to resonate with international investors.

Since the UK's departure from the EU single market and customs union, maintaining this attractiveness requires ongoing effort. The UK could be perceived as more risk-averse, making it increasingly important for London to demonstrate that it remains open, inclusive, globally minded, culturally rich, and future-facing. Continued investment in skills, innovation, urban renewal, and international relationships will be essential to sustaining London's status as one of the world's premier destinations for capital and talent.¹⁵

London as a gateway to the world

London continues to be a natural launchpad for firms seeking international opportunities. The city offers exceptional access to global investors, a pro-growth and innovation-friendly environment, and proximity to world-leading universities that attract diverse, highly skilled talent. As a result, many built environment companies choose London as the headquarters from which they serve clients across the UK, Europe, the Middle East, and Asia.¹⁶

For Gardiner & Theobald, London has been central to building international reach. "London enables us to attract exceptional people, work with leading partners, and deliver large, multi-market programmes with consistent leadership," says Managing Partner, Adam Glover. Clients also value the assurance associated with London's professional standards, transparent governance, and depth of built environment capability — qualities that allow Gardiner & Theobald to assemble multidisciplinary teams for complex, multi-jurisdictional schemes. This expertise is particularly valuable where clients require a single point of leadership but where delivery must be coordinated across several markets.

A survey of the NLA's members reinforces London's global role: 77 per cent of respondents are currently delivering international projects from London, and of those, the same proportion report an increase in international activity over the last five years. Firms are working across multiple regions at once — most commonly Europe (57.7 per cent), North America (38.5 per cent), Australasia (34.6 per cent), the Middle East (34.6 per cent), and East Asia (26.9 per cent).

However, firms report that finding a route into new markets remains a challenge. Common entry points include relationships with sister companies, established consultants, or local partners, as well as access through international frameworks in markets such as the Middle East and Asia. Success often requires building relationships with key decision makers, visiting locations, establishing satellite studios to demonstrate commitment, and partnering with local firms to navigate codes, regulations, and payment structures.

Gensler — a global design and architecture firm headquartered in San Francisco — has a history of expanding their geographical reach by following clients into new markets. "Many of our clients operate globally and it's important that we support them as they enter new regions," says Duncan Swinhoe of Gensler. "Sometimes clients take us to new locations;



El León Flood Protection forms part of a wider reconstruction programme, with London-based firms Arup, Mace and Gleeds providing engineering and delivery expertise for climate-resilient infrastructure across 13 coastal regions and seven cities in Peru. © Arup 2025

27%

derive over 50% of turnover from overseas projects

Based on respondents who indicated they currently deliver international work

other times they seek our advice on how to succeed in unfamiliar markets where we are well-established." Over the past two decades, this approach has underpinned Gensler's expansion into India and the Gulf region, with many of the relationships enabling that growth flowing through London. "Clients seek out London because of its enormous breadth and depth of expertise and its access to finance. Many of our international clients have longstanding relationships with the UK — some were even educated here," Swinhoe notes. "Over the past few years, we also expanded into Europe, and now have offices in Berlin, Munich, and Paris."

Prior + Partners, which spun out of AECOM in 2018, gained early international traction through relationships built during the AECOM era, leading to work in the Middle East, North America, and Asia. Their global success was recognised by the King's Award for Enterprise (International Trade) in 2024. Planning Director Tom Venables notes that "international work often comes through chance or from people in our network. Today, clients who once lived in London are commissioning major projects overseas." The practice now operates in London and Dubai, reflecting the growing expectation — especially in the Middle East — for firms to maintain a local presence.

Geographic spread of London firms' international work based on projects submitted to the NLA's call for submissions.



The biggest drivers for firms winning international work are quality-led not cost-led

- 1**
Design quality and creativity
(by a large margin)
- 2**
Experience with complex, large-scale projects
- 3**
Reputation and brand

Top three regions for future opportunity

- 1 Europe**
- 2 Middle East**
- 3 North America**

London's global brand is a meaningful asset

76%

say London's global brand identity is extremely/very important in securing international work

38%

of those currently working internationally say competitions/tenders are their main access point to winning international work

23%

say referral or word of mouth

11%

say partnership and repeat clients

Studio Woodroffe Papa, with studios in Amsterdam and London, expanded across Europe through the European competition and benefited from the freedom of movement and collaboration across the single market. London's depth of expertise, strong networks, and problem-solving capability have enabled the practice to scale into Asia and Australasia, often through personal contacts. Co-founder Dominic Papa emphasises that the transferable nature of urban design and masterplanning — more so than architecture — has allowed them to remain nimble, partnering with local teams rather than establishing overseas offices.

The NLA member survey responses show that competitions and tenders are the main access point to international work (38 per cent), followed by referrals and word of mouth (23 per cent), and partnerships or repeat clients (11 per cent respectively). Responses revealed that the greatest driver of success for NLA members is design quality, followed by experience with complex projects, brand reputation, and sustainability expertise. Cost-effectiveness ranks as the least important factor.

Yet firms also face significant challenges around access to international markets, competition from global practices, and a lack of government support. Richard Nelson, Founder and Managing Director of Abyss Global, stresses the need for rigorous preparation: "International expansion always takes longer and costs more than expected. You need to understand not just the market drivers but the cultural, administrative, and governmental context — whether you're going from the UK to Ireland or to Kazakhstan." He notes that emerging markets are often more willing to partner with foreign firms to accelerate skills development, whereas mature markets require a strong differentiator and clear value proposition.

In support of London-based practices, "brand Britain sells well internationally," says Nelson. "We're seen as world leaders in design. People respect what the UK has to offer." The outcome of the NLA survey reflects this standing: London's brand remains one of the sector's greatest assets, with 76 per cent of respondents saying it is extremely or very important in securing international work.

"Mott MacDonald is a global consultancy with offices in over 50 countries and we're exceptionally proud to be headquartered in London. Being anchored in one of the most dynamic and diverse cities globally, that is one of the best-connected and a hub for innovation and technology, enables us to attract some of the very best talent in the industry."

Clare Woodcock, Portfolio Market Leader, Mott MacDonald



London-based healthcare design expertise, integrating passive cooling and photovoltaic systems at Hamdan Bin Rashid Cancer Hospital in Dubai, United Arab Emirates. Completion due 2026. © Stantec



Left: ILO forms part of a mixed-use urban regeneration converting a single-use office block into a neighbourhood of homes, workplaces and community space in Brussels' European Quarter. Completion due 2032. © Morris + Company

Right: Large-scale ecological masterplanning, transforming a former military site into 10 million sqm mixed-use forest development in Baghdad, Iraq. © Gensler



Commercial workplace tower designed by Foster + Partners, delivering smart technology and flexible space at 270 Park Avenue, New York. Completed in 2025. © Max Touhey for JPMorganChase

How global capital deployed through London delivers nationwide economic value

Related Argent is a developer-owner-operator with a £13 billion UK portfolio. It brings together the expertise and track record of Argent — the developer behind some of the UK's most successful mixed-use places and Related — one of the most innovative real estate companies in the US. Its Chief Executive, Tom Goodall, puts it simply: "Real estate is a local endeavour powered by global capital. You need both sides of that coin to succeed." Partnerships, private and public, are fundamental. "Through 130 people in our UK office, we deliver around £1 million pounds of construction a day. That shows we're not doing that on our own. It shows the importance of partnerships and the ecosystem that sits below that."

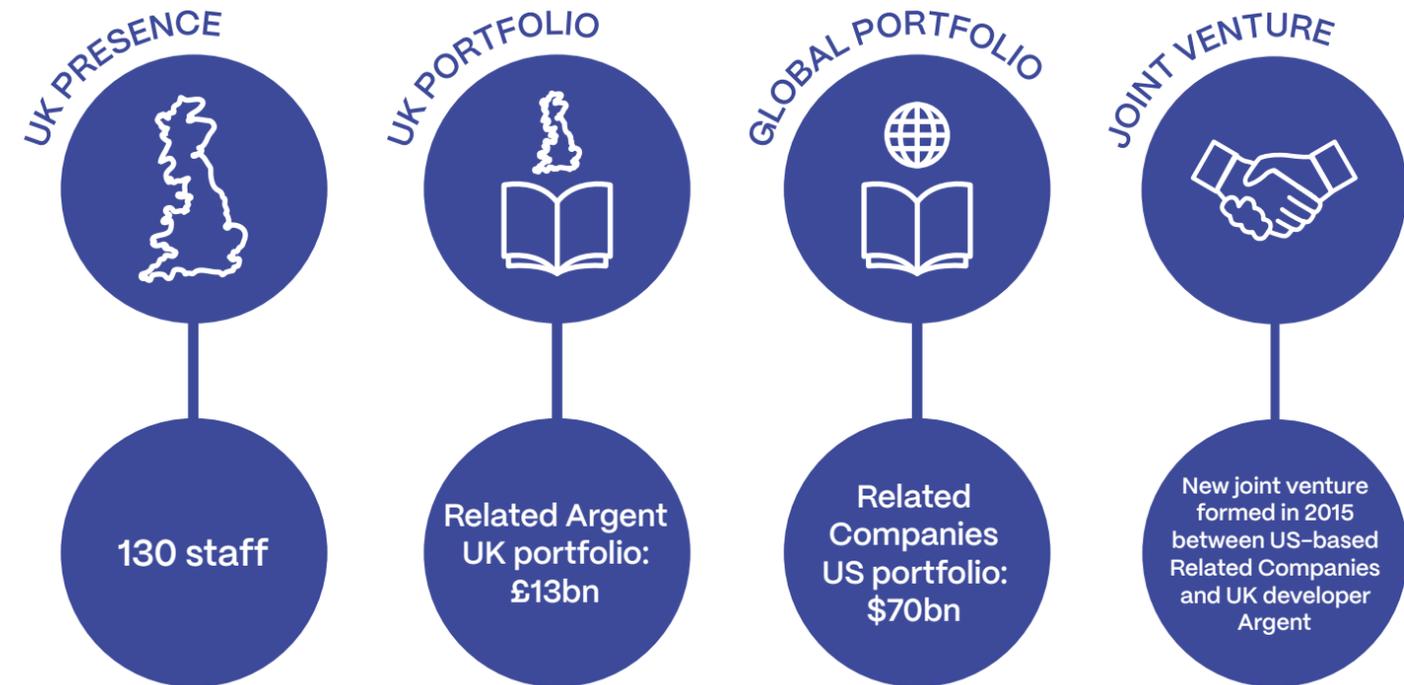
During the build-out of King's Cross, the business delivered around £1 million of construction every day for a decade. The scale brought huge logistical challenges, but it also demonstrated how London development ripples far beyond the site boundary. Much of that spend flowed into supply chains across the UK, a pattern amplified as the company expanded its portfolio to include Brent Cross Town.

London is Related's only office outside North America, a reflection of the city's global weight. Goodall cites its resilience and its cultural depth — food, fashion, entertainment, education, history — matched with its geographic ability to connect east and west. "That's what really makes it a desirable place to be."

Related Argent's investment at King's Cross shows how global capital deployed through London generates national value. UK housing is currently reliant on private capital for delivery and Goodall argues it should be designated strategic infrastructure. Without international investment, he says, affordable housing and social infrastructure simply will not be delivered in the quantities needed. "That's the most obvious reason why ensuring we are an attractive place to invest in real estate is so critically important to the UK, and to any country."

Even nine years into the 17-year construction programme, King's Cross had already created £3 billion of construction spend, £590 million of which remained in London, supporting 1,300 jobs and 600 apprenticeships. Some 8,500 people worked on the site then; today it is closer to 40,000. The estate also generates around £100 million of additional business rates for Camden. Local economic impact followed: by 2017 the new community produced £77 million a year in additional local spend, and footfall has since grown from virtually nothing pre-development, to 7.5 million in 2017 and to more than 20 million annually today.

The company insists planning gain must land within the communities it builds. It has created on-site job centres at King's Cross and Brent Cross Town so major occupiers and employers hire locally. "It shocked and surprised us how wide the tentacles of social impact from the regeneration of King's Cross spread."



Brent Cross Town, an £8 billion, 180-acre project, is three times the size of King's Cross and uses a "flourishing index" to measure social outcomes, over the life span of the project. "We're trying to create happy, healthy, vibrant, productive communities and make a positive impact. That underpins everything we've been doing for 20-odd years."

London's influence extends nationwide. Steel for the King's Cross gasholders was recommissioned in Sheffield; professional services and manufacturing across the UK benefit from each major scheme. "You really need London firing on all cylinders to boost the productivity and economic vitality of the rest of the country."

To remain a connected global city, Goodall stresses openness to capital, talent, trade and exports. "Our greatest export is services — we have a service industry that is the best in the world." Single ownership, long-term stewardship, flexibility and active placemaking remain the core lessons from King's Cross. "To create and grow value, you don't just have to build the theatre. You also have to put on the show."

London's stable rule of law and global appeal continue to draw investment. Brent Cross Town alone has secured £1.1 billion of committed capital. "Because if you don't have that, you don't get the job creation, productivity, construction spend, skills, the business rate income, and ultimately the new communities. It all starts with the seed of people investing in the development of the real estate."

"During the build-out of King's Cross, the business delivered around £1 million of construction every day for nearly a decade."

Tom Goodall, Chief Executive, Related Argent

Why global investors choose London as their entry point to the UK market

Newmark's acquisition of UK-based chartered surveyor and property consultancy Gerald Eve in 2023 was, says Simon Prichard, "a seismic moment" driven by Newmark's desire to further balance and extend its global business and Gerald Eve's ambition to generate income beyond the UK. Prichard, Managing Partner and Head of UK at Newmark and former Senior Partner at Gerald Eve, explains Gerald Eve was "a credible partner for capital and fostered opportunities coming both ways across the Atlantic," and "there was a certain logic to talking to us."

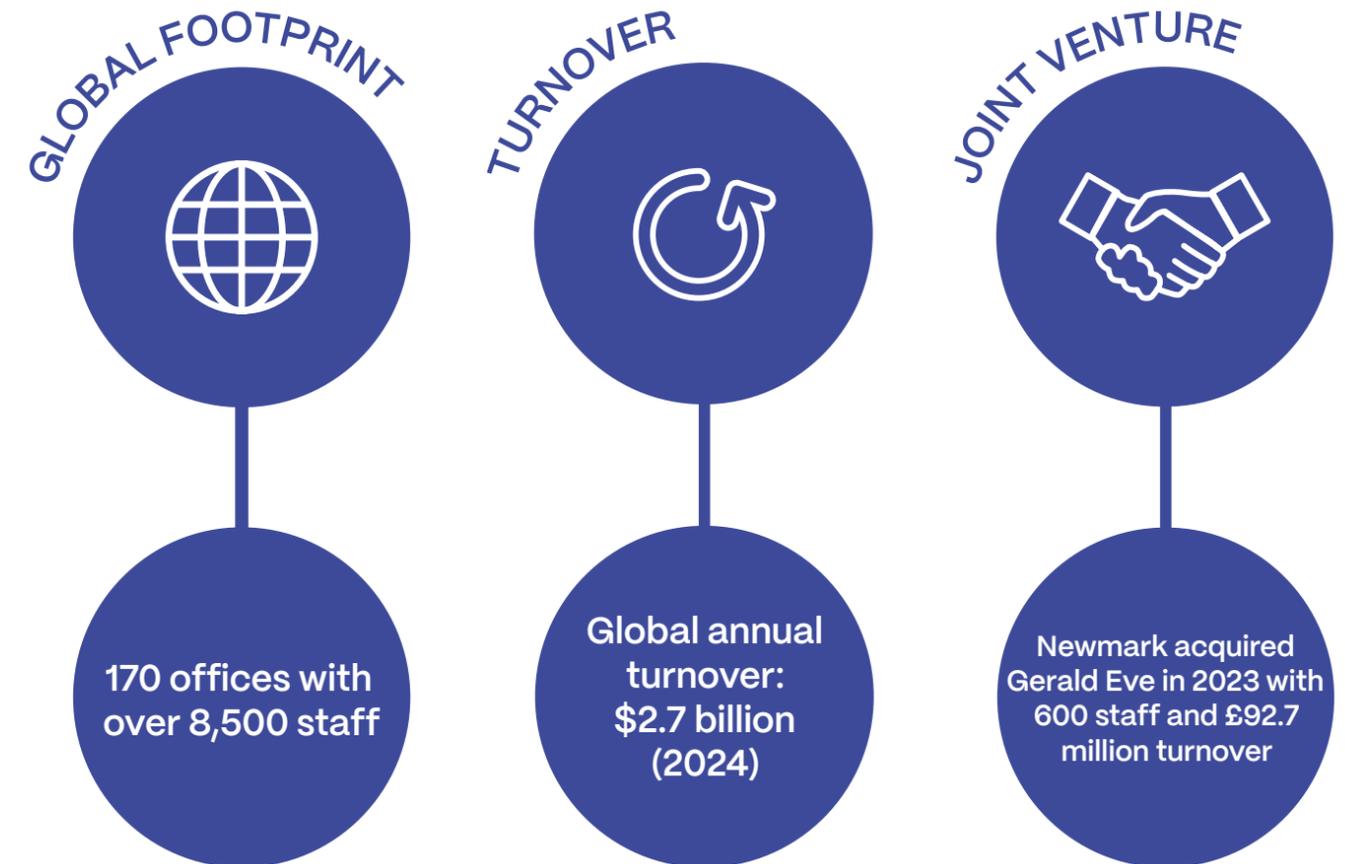
Gerald Eve had taken 80 years to reach £30 million in revenue, seeing meaningful and organic growth to almost £100 million in just over a decade. The question then became whether to remain "super niche" or join something larger with access to global capital. Newmark's attraction lay in its position within a "triumvirate of leasing, capital markets and services." "They brought genuine, action-oriented and broad real estate capital market capabilities to the table and access to North American capital... across Europe and beyond."

Cultural chemistry also mattered. Newmark prioritised growth over redundancies in the UK, adding Gerald Eve to two earlier UK acquisitions, Harper Dennis Hobbs (HDH) and BH2. "Three years in, it has been a decidedly good experience." He describes Newmark as "this amazing industry leader with tremendous unwavering drive."

Why London? "The money from both sides... still lands in London and then disseminates to Continental Europe. That hasn't changed," Prichard notes, despite dynamics post-Brexit. London remains a trusted hub for global capital and a generator of high-value services for the UK economy. The strength of London's professional services sectors is immense and London plays an important role in connecting three of the world's major economic blocs.

Real estate's global value is also unique as it touches on so many industries. Prichard notes how quickly Newmark recognised the UK company's strengths — and particularly in aviation advisory, planning and mixed-use development. "We're looking at whether we could translate the skill set... and take that to New York, Chicago, LA."

In terms of economic conditions, he believes America is "slightly ahead," the UK next, then continental Europe, while a mix of market pressures and economic headwinds are still impacting investment. Still, he sees a "flight to stability", with clients consolidating around firms offering excellence and durability. "There will be further consolidation and market share gains, and we intend to be one of the winners."



London's price advantage, safety, talent base and professional expertise underpin its resilience. "I still think this is one of the greatest cities in the world... a pre-eminent destination." Prichard would like to see London maintain its strategic importance and is a proponent of schools doing more to introduce real estate as a career path for young people. Not only would it be good for London, "that would be a total game changer for the sector," Prichard said.

WHAT MAKES LONDON'S CITY-MAKING EXPERTISE DISTINCT?

London's city-making expertise is defined by a highly international talent base, long-term placemaking, climate-focused digital innovation skills, and partnership-led delivery across public and private sectors, enabling the capital to test and scale complex regeneration, retrofit and resilience models that are adopted by cities worldwide.

London's distinctive value

London's global distinctiveness is increasingly shaped by the values set out in the New London Agenda — a shared framework developed through collaboration across London's built environment — that articulates what the capital is collectively striving towards: healthy and more inclusive places, long-term planning for future generations, and the ability to think beyond administrative boundaries to create resilient, cohesive places. Diversity is another defining characteristic, fostering culturally responsive practices and inclusive design. London's culture of innovation — in sustainable design, digital technology, low-carbon construction, and climate adaptation — sets new standards globally. Crucially, London's strength lies in its partnership-driven model: public, private, and community stakeholders working together to deliver complex projects. These combined qualities create a placemaking culture that is recognised internationally.



Senate DepEd Masterplan in Manila, delivered through the UK Government Green Cities programme, integrates transit-oriented development, heritage reuse, public realm expansion and carbon reduction strategies.
© Hawkins\Brown



Technology-driven masterplanning from London studios enables adaptive urban development in Linping Humane City, China.
© Hassell and StudioLux

“At the NLA’s The London Centre, international interest is particularly focused on London’s governance and planning systems, its approach to sustainability and climate resilience, and its models for regeneration, partnership working, and long-term stewardship.”

“The capital’s global influence stems not from claiming perfection, but from its openness, collaborative culture, and distinctive offer,” explains Lucy Musgrave, Founder of Publica. Many European cities excel in areas such as gender inclusion, housing, and public transport; while London’s contribution lies in its pragmatism, diversity, and uniquely collaborative mindset — qualities not always replicated elsewhere in the UK. “We must be clear about what is ‘uniquely London’ when we present ourselves internationally,” she notes.

This distinctiveness is reinforced by London firms’ willingness to engage, partner, and learn from others. As Patrick Richard, Principal Director at Stanton Williams, puts it, “Working outside the UK is another way to test, learn, and bring in new ideas — and to recognise that you do not have all the answers.”¹⁷

London’s strengths are increasingly recognised by overseas delegations visiting the capital. At the NLA’s The London Centre, international interest is particularly focused on London’s governance and planning systems, its approach to sustainability and climate resilience, and its models for regeneration, partnership working, and long-term stewardship. Delegations to the Square Mile often want to understand how the City has achieved a strong post-COVID recovery as a commercial centre, how it integrates heritage into modern development, and how retrofits are delivered at scale. Gwyn Richards, Planning and Development Director at the City of London Corporation, reflects that London’s global leadership in sustainability is shaped not by ideal conditions but by the constraints that force innovation.

Sustainability-led commercial design of the OSUS Green Tower in Riyadh, placing wellbeing, innovation and environmental performance at the centre of office development. Completion due in 2026. © Benoy



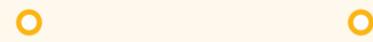
Proposed adaptive reuse of Kulan, a former ball-bearing factory on the River Sève into a mixed-use neighbourhood with housing, a riverside park and cultural, education and retail space in Gothenburg, Sweden. © Bell Phillips



Gardiner & Theobald argues that London’s next global contribution will be demonstrating how a mature, complex city can transition to a low-carbon, high-performing built environment. Few cities face the same combination of ageing assets, intensification pressures, and climate commitments. “If London can show how to retrofit, decarbonise, and repurpose its existing stock while continuing to grow, it will set a benchmark for cities worldwide,” says Adam Glover. Despite shifting political headwinds — including a rollback of sustainability commitments in the US — Richard Nelson of Abyss Global highlights that demand remains strong for circular economy expertise, job-creating green industries, and resilient design, even when “net zero” terminology can appear contentious.

London operates within an increasingly competitive global ecosystem that includes cities such as New York City, Paris, and Singapore, alongside domestic peers like Manchester and Birmingham. Katie Stewart notes that understanding “what London uniquely offers” — and how the capital positions its expertise relative to others — is essential to maintaining its global standing. This distinctiveness will increasingly be defined by London’s ability to showcase climate resilience, public-health-focused design, the adaptive reuse of existing assets, and collaborative innovation at scale.

The capital’s track record of major regeneration is one of the clearest demonstrations of this distinctive value. From the Queen Elizabeth Olympic Park to development corporation models now studied and adapted internationally, London has repeatedly shown how to deliver long-term, multi-phase urban transformation under complex conditions. These tangible examples remain powerful tools for illustrating how cities can evolve successfully — and underline why London continues to hold influence far beyond its boundaries.



London's biggest strengths for international built environment work. According to the NLA's global export survey of members:

1
Global reputation for design, planning and innovation

2
Capability in delivering complex, high-profile global projects

3
Leadership in sustainable urban development and climate resilience

4
Well-established professional institutions and regulatory frameworks

5
Cultural diversity and international mindset

6
Skilled diverse workforce with strong talent pipelines

These represent the six highest-ranked options from a total of eleven

Talent, skills and innovation

London is a global talent hub, drawing people from around the world who, in turn, export their expertise to international markets. Its diverse workforce creates a two-way exchange of knowledge — London shapes global practice, but global experience also continually feeds back into the city. This circulation of talent underpins a world-class innovation ecosystem, giving London a unique "local knowledge of the world."¹⁸

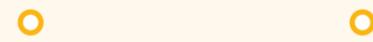
London attracts international professionals because it is a global centre for built environment excellence. To maintain this position, the city must foster the right business conditions — supporting a stable pro-business, pro-growth, and pro-success environment to underpin its vibrant economy and drive demand for high-quality buildings and places. This in turn attracts and retains the world-class talent that underpins London's built environment sector. Richard Nelson adds that "London's international talent base provides invaluable cultural understanding and global market awareness, making it a natural magnet for clients and collaborators from abroad."

This talent ecosystem is nurtured by some of the world's most respected built environment institutions, including The Bartlett, University College London (UCL), the Architectural Association, and London School of Economics (LSE). These schools attract exceptional students, foster strong diplomatic networks across continents, and help to circulate ideas between academia and practice. UCL's student community is 52 per cent international, and its alumni are dispersed across the world.¹⁹

Many international graduates stay in London, deepening its global literacy. At Studio Woodroffe Papa, for instance, nearly 29 nationalities are represented, and multilingual teams support work across markets from China to the Netherlands. As Dominic Papa notes, this continuous exchange between research and practice is a key driver of innovation — from resilience planning to circularity and new materials — and a fundamental part of what keeps London at the forefront of global design thinking.

Grimshaw reflects a similar pattern. "Our team collectively speaks more than 50 languages," says Partner Annelie Kwick Thompson, "creating a rich mix of experiences and an agility that helps us work globally."²⁰ This diversity is a major asset in a sector where design ideas and technical expertise are increasingly mobile.

"We recognise and celebrate that diversity of thinking, ideas, cultures, and backgrounds is critical to successful design," says Duncan Swinhoe of Gensler. "You can't design for a city without understanding the many layers that make it what it is." London's own diversity, he notes, is a strategic advantage — both globally connected and culturally rich. "If a client comes to our London office with a project in Greece, India, or Riyadh, having someone who understands their culture, speaks their language, and can translate differences builds confidence and accelerates the process." The same applies internally: long-standing team members have a history of returning to their home countries to establish new Gensler offices, bringing with them "the culture, relationships, knowledge, and learning" developed in London. "Those two aspects," Swinhoe says, "are incredibly important, and something we actively celebrate and promote."



74%

report a negative impact on ability to recruit staff from outside the UK since Brexit

70%

say access to international talent is essential or important for their business today

Answered by 20 businesses providing skills and talent data

This international clout and outreach are unique in Europe. "With talent drawn from around the world and working across cultures, architects are able to absorb and translate many influences, says John Bushell, Design Principal at KPF. "Taking the best elements of one place and understanding how those ideas can be translated to another."²¹

Ben Campkin is Professor of Urbanism and Urban History and Vice-Dean Public and City Engagement for The Bartlett Faculty of the Built Environment at UCL. He co-founded the partnership-based Master of Arts and Science Global Urbanism programme, which uses a case study and partnership-based pedagogy to encourage students to reflect critically and ethically on their responsibilities as future international urban practitioners. As built environment professionals increasingly work across borders, the programme places particular emphasis on engaging meaningfully with local contexts in London and Johannesburg, supported by a long-standing partnership with the University of the Witwatersrand in Johannesburg.

"We also work closely with local authorities and community organisations in London, where students conduct their thesis projects," Campkin explains. "London's built environment is a powerful generator of ideas and theories — it's rich in resources and continually shaped by the people who pass through it. At The Bartlett, we mirror that dynamism by collaborating in a structured way with local partners on shared priorities."



Echo is an installation using reclaimed clay roof tiles and craft-based timber construction, drawing on historic Korean joinery and craft traditions at the Seoul Biennale. Completed in 2025. © Bureau de Change Architects

Tree of Life is a regeneration concept proposing reuse of blast-damaged port metal to form a pavilion for remembrance in Beirut, Lebanon. © Studio Lux



Brexit had a profound impact on talent flows and 74 per cent of the NLA survey respondents report recruitment challenges since Brexit. Gwyn Richards of the City of London Corporation notes that London has long been the go-to destination for young architects worldwide, but new barriers and a more protectionist stance now risk eroding that position. This makes London's role as an open and accessible place of convening — especially at a time when other countries are becoming more closed — more important than ever.

As of 2025, new Skilled Worker visa holders typically need a salary of at least £41,700 per year, or the "going rate" for their occupation — a threshold that is often higher than what many entry-level architecture roles offer.²² By contrast, first-year Part I architectural assistants in many practices still earn around £22,000–£25,000, rising with experience but frequently falling below visa eligibility levels, especially outside London.²³ This makes visa sponsorship financially challenging for small and medium-sized practices (SMEs), bolstering the competitive advantage of larger firms that can afford to meet the higher salary requirements.

London's cost of living remains a significant barrier, particularly for young graduates trying to establish their careers, for which the starting point is incredibly tough. Affordable housing is a fundamental component of a successful city that enables people to build stable lives over time. London must unlock the housing crisis and continue to invest in high-quality infrastructure if it is to remain a place where people can afford to stay and thrive.

Meeting the UK's growth ambitions, net zero goals, and inclusivity agenda will require sustained investment in both new talent and the upskilling of the existing workforce. Adam Glover emphasises that London's competitive advantage depends on continued investment in

○ ○

What are the biggest challenge to securing international work?

- 1**
Access to international markets
- 2**
Competition from global firms
- 3**
Lack of government support
- 4**
Visa or mobility restrictions

"London's own diversity, is a strategic advantage — both globally connected and culturally rich."

*Duncan Swinhoe,
Co-Managing Director,
Gensler*

modern delivery capability and future skills: "The global market increasingly rewards digital competence, programme leadership, and low-carbon expertise," he says. "Flexible support for skills development — particularly in data and AI-enabled delivery, Modern Methods of Construction (MMC), commercial management, and carbon literacy — will be essential for keeping London at the forefront of global practice."

But technical capability alone is not enough. Lucy Musgrave of Publica argues that the sector must also deepen its inter- and cross-disciplinary working, cultivating new skills and perspectives in civic urbanism. She stresses the importance of ensuring that the process of shaping places is inclusive and does not marginalise under-represented groups. "By drawing on the full breadth of society's talent and embedding equity in project design and delivery, London can create more representative places and, in doing so, help rebuild civic trust and pride."

The UK government is increasingly recognising the need to attract and retain talent by opening clear pathways for international expertise while strengthening domestic recruitment through education and reskilling. Creating flexible and inclusive qualification routes — from apprenticeships and trainee pathways to in-work degrees, mid-career training, and modular learning — will be essential to sustaining a diverse and future-ready workforce. As Adam Glover reflects, "Expanding access for under-represented groups and professionals in related fields will further strengthen the diversity, resilience, and innovation of the sector." By broadening who can enter and progress within the built environment professions, London and the UK can secure the skills needed to meet their economic, environmental, and social ambitions.

Olympic-led masterplanning creating a long-term, intergenerational community at Milan's Porta Romana as part of the Milano Cortina 2026 village. Completion due in 2025. © Skidmore Owings and Merrill (SOM)



How a London-founded firm exports design expertise, skills and soft power worldwide

Foster + Partners is the UK's largest architectural practice by some margin, but one whose influence reaches far beyond Britain, exporting design expertise worldwide from its London base.

"Norman [Foster] started the practice in 1967 and actually our strength has been that we operate globally", says managing partner Stuart Latham. "We have always had the majority of our people here and the majority of our work overseas, to the point where we're approaching 85 per cent of our staff here with 85 per cent of our work overseas. We've always been based in London and then we've essentially exported our design expertise and our skills overseas."

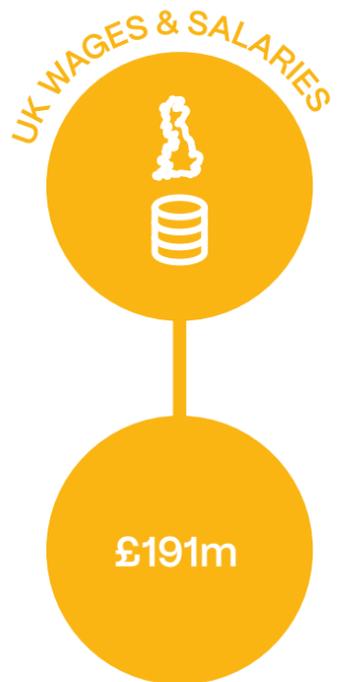
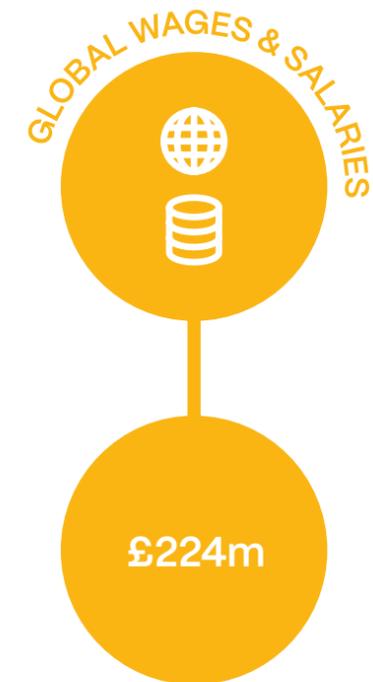
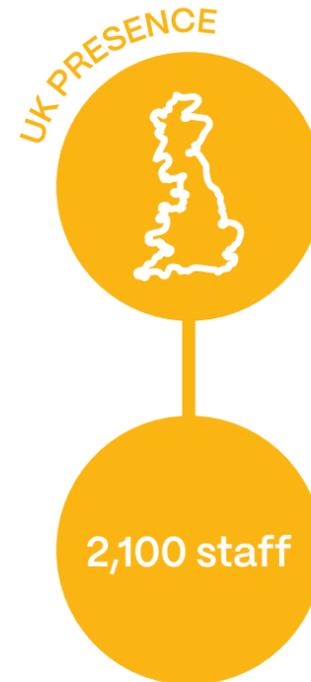
That model took shape when the practice won the competition to design HSBC's headquarters in Hong Kong in 1979, followed by Chek Lap Kok [Hong Kong International] airport in 1992. Since then, the firm has organised itself around London-based design studios supported by specialist teams. "The design is done in London", says Latham, "and because of our scale, we can bring huge talent and huge specialisms to bear on projects", supported by local presence overseas.

There is a clear cachet to being a London practice on the global stage. "When we operate overseas the fact that we are UK architects has cachet because London's known for its creativity and as a practice we're known for our design." Unlike many other international firms that deliver services outside of their home country, Foster + Partners' intellectual rigour and decision-making remains centred in London, governed by a design board made up of the most experienced and talented designers, led by Lord Foster, who oversee all our projects worldwide.

London's ability to attract global talent underpins that success. "You're getting the cream of the crop", says Latham, pointing to institutions such as The Bartlett and the capital's wider educational ecosystem. "And because the talent's already here, because London attracts them, it's easy for us to employ them." That talent base allows the firm to export high-value consultancy rather than production-based services. The design premium is earned in London, while delivery overseas is supported by local collaborators with local regulatory and contextual knowledge.

Although Foster + Partners operates from more than 20 offices worldwide, these are centrally supported by a London-based trading company where the majority of fees are earned and retained. "It's advantageous because we're working in a much larger market and winning projects that the local economy alone can't hope to generate," says Latham, reinforcing London's role as the value-creating hub.

That international reach also provides resilience. During the global financial crisis, the practice pivoted towards the Middle East, while current



"We have always had the majority of our people here and the majority of our work overseas, to the point where we're approaching 85 per cent of our staff here with 85 per cent of our work overseas."

*Stuart Latham,
Managing Partner,
Foster + Partners*

slowdowns in China and other regions are balanced by work elsewhere. At home, Foster + Partners is contributing to major UK projects, including the Oxford Science Park for the Ellison Institute of Technology. "That's UK-based academic talent focused on some of the world's most complex challenges," says Latham. The relationship has also helped attract further investment, with the Ellison Institute of Technology expanding its offices to London.

London's connectivity, cultural institutions and multidisciplinary ecosystem further strengthen the firm's export capability. With architects, landscape designers, urban designers, anthropologists and mathematicians on staff, the practice also feeds skills back into the UK through teaching and training via its own Profession Practice Academy. "We probably train about 10% of all the architects who qualified in the UK last year."

Today, Foster + Partners employs 2,500 people, 2,100 of them in London. "We're a people business", says Latham. "We're London based; we're a UK firm, but our horizon is global."

How London-developed skills and infrastructure expertise shapes global cities

"Arup is headquartered in London and is a British company, unlike many of our competitors in this sector", says director Joanna Rowelle. "We are British born; London is our global HQ." Around 2,500 of its 16,000 global staff are based in the capital, with most of the firm's disciplines represented there. Arup has four-region model with a presence in – Americas, APAC, UKIMEA and Europe.

London is also the backdrop for many of Arup's most iconic contributions to the UK economy. "From being part of the Elizabeth Line design team to creating the fire evacuation strategy for the Shard, our footprint can be found everywhere" says Rowelle. "We've got a real swell of talent in London."

That talent anchors the phrase often repeated internally: "Our projects are both in London and from London." The firm delivers heavily within the capital's boroughs, but its London expertise also shapes major international commissions".

This centrality dates back 80 years to Ove Arup's first office on Fitzroy Square – sometimes colloquially now known as "Arup Land". "He wanted to establish a company of talent and experts... the Arup values still ring true. It's all about integrity, honourable dealings, the right scale to deliver and knowing our people." From the Sydney Opera House onwards, Arup's London-rooted culture has fuelled global expansion.

Today, Arup's London base exports its capabilities widely. The skills built on major infrastructure – Crossrail, High Speed Two, and London's broader growth – are sought internationally. Staff from the Crossrail team now advise the New Zealand government on metro planning. "What is born here in the ways we develop projects has helped us grow skills elsewhere globally." In recent years the firm has expanded significantly into newer sectors, with projects including specialist lab design following the Francis Crick Institute. "We've got the knowledge in the built environment to deliver for many parts of the economy," Rowelle says, from commercial megaprojects to cultural institutions like the British Museum and British Library, and community-focused regeneration at Ebury Estate. "We're wedded to making sure we do the right thing for communities."

London's ecosystem is critical. Its universities supply world-class talent, and as a global city it attracts skilled planners, engineers and designers from across Europe.

For more than fifty years, Arup has worked on the principle laid down by its founder to hire good people when you see them – even if they don't immediately know what to do with them. "We tend to export and import that talent into and around the business globally, so we've got the right balance for the projects each region is working on". Arup also focuses on

"Our projects are in London and from London."

*Joanna Rowelle,
Director, Arup*



projects that boost London's own productivity – the DLR extension, the Elizabeth Line, Thamesmead Crossing, Silvertown Tunnel – keeping both the city and UK expertise on the world stage.

Arup's London-based specialisms in water, energy, structural engineering, M&E, and sustainability are major exports, even feeding into projects like the Sagrada Familia. Its collaboration with universities and habit of embedding academics in project teams ensures continuous innovation. "It keeps us at the top of our game."

Looking ahead, London remains Arup's long-term home, though Rowelle warns that housing affordability threatens talent retention. "We really worry; we could have a brain drain... we could lose that middle level of employee looking to buy a home and start a family." Still, Arup's mission is constant: "everyone who works in Arup is passionate about doing the right thing... we drive excellence and we work globally because we want to learn from others and share our experiences too."

HOW CAN LONDON UNLOCK ITS BUILT ENVIRONMENT POTENTIAL?

Aligned national and local decision-making, regulatory clarity, coordinated international advocacy and a unified sector voice are central to unlocking London's next phase of built-environment growth, ultimately improving investor confidence, supporting SMEs, attracting talent and reinforcing the capital as a global hub for city-making expertise.



Transit-oriented development of the Senate DepEd Masterplan in Manila, Philippines.
© Hawkins\Brown

“The built environment is still too often viewed by government as a collection of small, fragmented industries rather than the national powerhouse it truly is.”

Local and national leadership

International clients value the UK for its governance and reliability, but they also expect clarity about how decisions are made across different levels of government. Greater alignment between national, regional, and local decision-making would speed up delivery, reduce uncertainty, and strengthen the UK's professional reputation internationally — all without the need for major structural overhaul.

Industry voices also noted a growing challenge in engaging government ministers on built environment issues. The collective literacy and shared vision that once underpinned national policy has weakened, leaving central government with a limited understanding of city-making and little leadership to champion it. Many argued that the UK urgently needs political figures who can articulate the strategic value of the built environment and take ownership of a coherent national agenda.

Lucy Musgrave of Publica pointed to a moment when such leadership did exist: the appointment of Richard Rogers to lead the Urban Task Force in 1999. Although tasked narrowly with addressing housing delivery, Rogers reframed the problem as an 'urban renaissance' — a holistic vision for the future of towns, cities, and culture. "That agenda gave us momentum," Lucy reflects. "But after the financial crisis, the focus shifted. Now the opportunity lies in finding our champions again — the right voices to help build a stronger culture around the built environment. The talent and leadership are there, but it doesn't yet hang together as a cohesive whole."

The built environment is still too often viewed by government as a collection of small, fragmented industries rather than the national powerhouse it truly is. Compounding these issues, short political cycles continue to incentivise short-term fixes when London requires long-term commitments that transcend party politics. While government support is largely channelled into the eight Industrial Strategy priority sectors (IS-8), this leaves a gap in recognising the strategic role the built environment plays in economic growth, global competitiveness, and national resilience.

As Nick McKeogh argues, “like financial services, the built environment should be positioned as a driver of national competitiveness. Bottom-up initiatives matter, but without top-down recognition, real investment and skills support will remain out of reach.”

The NLA are encouraging the Office for Investment to play a more proactive role in supporting the built environment as a strategic growth and export sector. By recognising the sector’s central role in converting global capital into UK jobs, skills, infrastructure, and place-based value, the Office could help align international investors with nationally and regionally significant development priorities. This could include actively promoting the UK’s built environment expertise to overseas investors, supporting long-term patient capital for complex regeneration, retrofit and infrastructure programmes, and working with local authorities, Mayoral Combined Authorities, and industry to ensure that inward investment delivers clear economic, social, and environmental outcomes. A stronger partnership between the Office for Investment and the built environment sector would help bridge the gap between capital attraction and on-the-ground delivery, reinforcing London’s role as a gateway for global investment while maximising benefits across the wider UK.

This calls for a clear, compelling narrative. “What we are really talking about is developing a campaign,” says Jo Negrini, Director at Arup. “Ministers want visible solutions that drive growth. Too often the focus falls solely on housing, but our sector can offer a broader story. Skills are fundamental — building people’s capabilities, creating jobs, and putting money into people’s pockets. That is the growth story the government needs to hear.”

Concerns were also raised about the uneven visibility and support that UK firms receive in international markets. Duncan Swinhoe of Gensler notes that while the firm has benefitted from meaningful government backing, this support has often been episodic, shifting with political priorities. He recalls the Greater London Authority leading several delegations as UK companies expanded into Dubai and Abu Dhabi — missions that helped Gensler understand local opportunities and build relationships with clients on globally significant projects, from masterplans to airports. “Government-to-government connections can be hugely powerful, and they’re something we’d like to leverage as far as we can,” he says.

“Ministers want visible solutions that drive growth. Too often the focus falls solely on housing, but our sector can offer a broader story. Skills are fundamental — building people’s capabilities, creating jobs, and putting money into people’s pockets. That is the growth story the government needs to hear.”

Jo Negrini, Director, Arup



Airport terminal design combining large-span roof engineering with culturally responsive architecture at Techo International Airport in Phnom Penh, Cambodia. Completed in 2025. © Nigel Young/Foster + Partners

For many SMEs, however, this type of backing is less consistent. Tom Venables of Prior + Partners describes limited support for smaller firms, with government attention skewed toward major contractors and engineering companies. Richard Nelson of Abyss Global agrees, noting that large firms tend to attract interest simply because of their scale, while the majority of built environment businesses — most of them SMEs — struggle for recognition.

London’s built environment — large and small companies — relies on coordinated international advocacy to strengthen its global position. Industry voices emphasised that UK ambassadors and high commissioners could play a stronger, more proactive role in championing British firms overseas. “We need more ambassadors to push British skills and benefits to project owners and developers and then be able to prioritise major global projects and cities according to those skills and benefits,” says Phil Dowrick of AtkinsRéalis. Strengthened diplomatic relationships, combined with more supportive trade arrangements, would help level the playing field for UK firms in competitive markets. Richard Nelson notes that, unlike France, Australia, or Japan — which routinely back professional teams — UK institutions tend to avoid supporting individual firms, partly because British companies are often competing against one another for the same high-profile work. He suggests that a more effective approach would be to promote multiple UK firms as a collective offer, enabling stronger international representation without favouritism.



High-density residential masterplanning of Summit & Ridge Sanctuary, shaping twin towers and a podium responding to Sydney’s skyline and neighbourhood context. Completion due 2027. © Turner Studio

“For London to build a similar position, it must actively champion the values that underpin its identity — governance, democracy, multiculturalism, and openness.”

At the same time, Nelson highlights that support does exist: the Department for Business and Trade (DBT) actively organises trade missions, and UK Export Finance (UKEF) provides valuable backing, particularly for start-ups moving into international markets. “The issue is often awareness,” he says, “and the government could benefit the sector by more proactively promoting its own products and services.” Ensuring that firms understand how to access this support would help strengthen the UK’s overall export ecosystem.

The Office for Investment has approached the NLA to explore partnership opportunities to support export activity in key markets. “This presents a real opportunity to tell a stronger collective story about investment, job creation, and the export potential of our sector — a level of engagement with government we haven’t seen before,” says Nick McKeogh.

London also has the potential not only to export expertise but to serve as a global convening hub — a place where knowledge is exchanged on equal terms. The Council on Tall Buildings and Urban Habitat (CTBUH), headquartered in Chicago, offers a compelling model which champions research, knowledge-sharing, and sustainable design worldwide. For London to build a similar position, it must actively champion the values that underpin its identity — governance, democracy, multiculturalism, and openness. Without deliberate articulation and protection, these foundations risk being eroded, weakening the city’s platform for global influence.

London & Partners is the growth agency for London, established by the Mayor of London, with a mission to create economic growth that is resilient, sustainable and inclusive. The organisation works to deliver economic benefit to London by supporting businesses, attracting investment and promoting the capital as a place to invest, grow and visit. Since 2011, London & Partners has added £4.1 billion to the capital’s economy, supports one-third of foreign direct investment in key London sectors and half of new jobs created by international investors in London’s high productivity sectors, helped thousands of companies enter new markets, and recently expanded its support for small and micro-businesses through its Grow London programmes. “The ambition is to grow the UK economy and jobs,” says Sara French, Director of Trade & Growth. “The work has focused on London so far, but there is real potential to scale it nationally.”

Policy and market conditions

Confidence is foundational to attracting both investment and talent. Businesses make long-term commitments when they can rely on a stable and predictable policy environment, supported by coordination between national government, City Hall, and local authorities — and underpinned by robust institutions that protect London’s integrity as a global city. When governance is aligned and regulation is clear, certainty follows. That certainty unlocks sustained investment, enabling a healthy pipeline of development across housing, commercial space, retrofit, and infrastructure, and giving built environment professionals the foundations to develop long-term careers in London.

However, Pip Prongué highlights that the UK’s increasingly complex planning landscape could benefit from being simplified to strengthen investor confidence. The Building Safety Act — introduced to improve safety following

the Grenfell Tower tragedy — has created delays, and “while extremely important, this is disincentivising investment,” says Prongué, “because investors need certainty around timeframes.”

Against this backdrop, the City of London Corporation is openly and consistently pro-growth. At the height of Covid, it launched Destination City, a bold strategy for transforming the Square Mile into a dynamic, seven-day-a-week commercial and cultural hub. “We take a very pragmatic approach to delivering growth, knowing when to push and when to compromise,” explains Katie Stewart. That proactive stance has helped maintain investor confidence at a time when other global commercial centres have struggled.

Stewart also argues for greater fiscal flexibility — including business rate retention — so that London can continue driving national growth. The NLA’s survey respondents echoed this, calling for tax and immigration policies that make London more attractive to investors and international talent.

Complex public procurement processes also create a barrier, particularly for SMEs. Frameworks designed to streamline commissioning often have demanding entry requirements, making it difficult for small firms to gain access. Tom Venables of Prior + Partners suggests that the public sector could become more entrepreneurial in how it commissions work to support creativity and competitiveness.

Dominic Papa of Studio Woodroffe Papa observes that current UK procurement practices inherently favour large companies due to onerous legal, financial, and compliance standards. In contrast, procurement processes in places like Belgium are simple, open, and efficient, he says: firms submit a portfolio and short written response; shortlisted teams are paid to develop a concept, and a winner is selected. “These are seamless processes that make it easy to win work,” says Papa. Streamlining UK procurement in a similar way would create more opportunities for SMEs and support national growth.

In summary, London’s policy landscape holds enormous potential, but realising it requires clarity, stability, and a willingness to reform. Simplifying processes, championing pro-growth governance, supporting SMEs, and learning from international best practice will ensure the built environment sector remains competitive — and capable of driving national productivity, innovation, and inclusive growth.

Collaboration and shared purpose

Collaboration sits at the heart of London's built environment success, yet the sector has not fully harnessed its collective strengths or articulated a shared mission that reflects its global potential. As international competition intensifies, the UK's built environment faces an urgent need to present a clearer, more unified voice — one that demonstrates the value it brings as a national growth sector, and the leadership London can offer in addressing global urban challenges.

London's unique qualities give the capital a distinctive advantage. But today, the built environment is still perceived as a group of loosely connected industries rather than the integrated ecosystem that it truly is. This fragmentation limits the ability to advocate effectively, coordinate internationally, and demonstrate the collective value to government, investors, and global partners.

Other countries have taken a more structured approach to shaping their built environment culture and identity. Germany's Baukultur initiative is a striking example: a national institution that produces biennial reports on themes such as circularity, material passports, housing, and transport, and disseminates its findings through exhibitions, conferences, and education. Baukultur provides the country with a coherent design culture that is widely understood, politically supported, and deeply integrated into civic discourse. It offers a model of how research, policy, and practice can align to embed design excellence at every level of society. By contrast, the UK lacks an equivalent national initiative that unifies the sector around shared principles of design, city-making, and long-term stewardship.

This gap is felt across the sector. As Lucy Musgrave notes, London retains a powerful negotiated model of governance, but the cultural vision that once guided British city-making — a collective understanding of why what we build matters — has weakened. Meanwhile, other countries benefit from more coordinated national sectors, joined-up export strategies, and strong convening institutions. UK firms often find themselves competing overseas against teams backed by clear governmental support, while the UK does not yet project an equally cohesive narrative about its own built environment expertise.

To strengthen London's global leadership, the sector must cultivate a clearer, more confident identity — one defined by shared purpose, cross-disciplinary collaboration, and a commitment to long-term urban resilience. Developing a common language for city-making would help align the many disciplines that shape the built environment and provide government, industry, and international partners with a clearer understanding of what London stands for. Creating structured spaces for knowledge exchange, export-facing networks, and global partnerships would ensure that London's ideas, innovations, and governance models continue to circulate internationally, and give the UK a stronger platform from which to compete and collaborate globally.

“To strengthen London's global leadership, the sector must cultivate a clearer, more confident identity — one defined by shared purpose, cross-disciplinary collaboration, and a commitment to long-term urban resilience.”

2150 Lakeshore,
Allies and Morrison
Architects, 2019
© Allies and Morrison



How global investment enables UK delivery expertise to scale internationally from London

When London gets things right, says Mace Executive Chairman Mark Reynolds, the results are often a “raging success,” admired worldwide. Programmes such as London 2012 and the Elizabeth Line may have attracted criticism over cost or complexity, but “those programmes are deemed a huge success, such that we can then go and sell them to others, elsewhere around the world.”

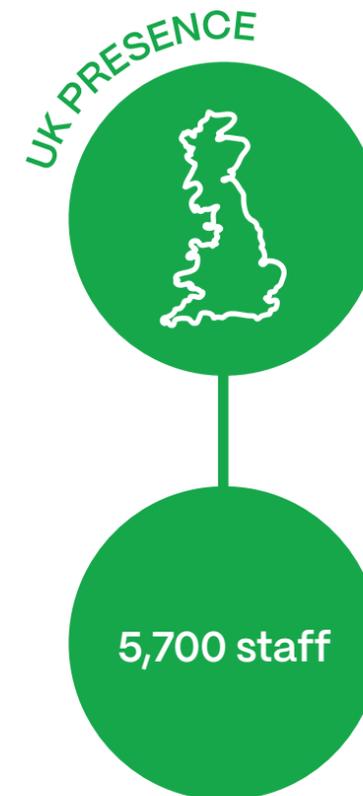
The London 2012 Olympic and Paralympic Games remains the global benchmark for major programme delivery, while the Elizabeth Line showcases one of London’s defining strengths — its transport infrastructure. And Mace’s growth is inseparable from that success. “There’s no doubt about it, we are a London-centric business,” Reynolds says, “and we’ve grown on the back of London being very successful.”

Even before Mace was founded, its five former Bovis founders helped create Broadgate, a project that reshaped the City of London in the 1980s and pioneered more collaborative construction management. Alongside legislative change, including the relaxation of height and planning restrictions, this period fuelled London’s commercial and financial expansion. “There were fundamental legislative changes that allowed London to grow at an exponential rate.”

That ethos carried through to Heathrow Terminal 5, whose lessons fed directly into the London Olympics and later projects. Governance, sustainability, employment, and legacy all became transferable skills. More Mace schemes such as Battersea Power Station and the Shard reinforced how London delivered complexity at scale. “The Shard, run in parallel with the Olympics, demonstrated the culture of how to carry out such complex work.”

London remains the global reference point. Reynolds notes that international colleagues view the city with envy, citing its heritage, education, green space, and connectivity. “Our transport system is second to none around the world,” he says, comparing it favourably with New York City, Dubai and Singapore. Projects such as Tottenham Hotspur Stadium reinforce London’s cultural and sporting leadership. “Everything everyone aspires to is in London... whenever someone wants a cultural centre, a stadium, a connected infrastructure, London is always a reference point.”

That status underpins Mace’s international growth. Following its demerger, Mace Construct now focuses on delivery, while Mace Consult expands globally with backing from Goldman Sachs, which acquired 75 per cent of the consultancy in July 2025. The relationship enables London-developed expertise to be exported worldwide. “We’ve been able to demonstrate how to do things using that construction expertise,” Reynolds explains. Experience from Heathrow helped win the Hudson Tunnel project in New York City, while lessons from the Shard secured work on the Kingdom Tower in Jeddah, Saudi Arabia. “It has definitely helped us win work in international regions.”



Mace’s 2025 revenue is forecast at £3 billion, employing nearly 8,000 people. While Construct remains concentrated in London and the South East, it also operates across the Midlands, East Anglia, and beyond. Around 2,300 staff are overseas, with major hubs in the Middle East and Asia. Some 60 per cent of work is in Europe, including Hong Kong, where projects were won after officials came to the UK to study London delivery models. “That being the starting point,” Reynolds says, “is how we win work.”

The economic feedback loop is significant. Reynolds estimates Mace contributes around £190 million annually through corporation and employment taxes, with staff spending feeding wider growth. Company accounts show a £550 million tax contribution in 2024. “The work we do overseas brings work back into the UK and London,” he says. “And the work we do in London allows us to win work elsewhere and brings money back into the UK.”

Reynolds believes government underestimates the built environment’s impact. With 2.6 million people in construction and far more across the wider sector, “there is a lack of understanding about how much London in particular contributes to UK tax revenues.”

Looking ahead, Reynolds hopes London 2012 will be joined by a new exemplar — the £35 billion Hospital 2.0 programme. “We want those beacon programmes to be the catalyst for change that we can then export all around the world,” he says. “That won’t just be a London export, but a national one.”



OUR ACTIONS: HOW WILL THE NLA CHAMPION LONDON AS A GLOBAL CONNECTED CAPITAL?

With the right collaborative framework in place, London has the opportunity to position itself as a global convening centre for the built environment — a place where knowledge is exchanged openly, where best practice is shared, and where solutions to the world’s most pressing urban challenges are explored collectively.

For almost two decades, the NLA has served as London’s primary forum for the built environment and built a trusted platform in which professionals, policymakers, developers, academics, and communities come together to debate, learn, and shape the future of the city. Through our extensive events programme, exhibitions, research publications, annual festival, and The London Centre, the NLA has created a civic infrastructure for conversation.

This platform is not merely local. The NLA’s network is inherently international: as our survey reveals, many members undertake a significant proportion of their work overseas, while international delegations visit The London Centre each year to learn from the capital’s experience. London’s best ideas are already being carried into global markets through the practices that the NLA convenes. The opportunity now is to organise this global network more intentionally, strengthening London’s leadership position and supporting the UK’s export ambitions.

The NLA already curate frameworks that help articulate London’s value globally. The New London Agenda provides a widely recognised best-practice framework for city-making, offering principles that many global cities now look to for guidance on health, inclusion, long-term stewardship, and sustainable growth. Opportunity London promotes London’s investment offer to international audiences, demonstrating the city’s ambition and capacity for growth.

Building on these foundations, the NLA is launching the Built World Exchange — a global network for international knowledge exchange, advocacy, and leadership. It brings together London’s public, private, and academic expertise with global partners, creating a structured platform through which the capital can project its ideas, learn from others and coordinate collective action.

Working together with the Office for Investment, City of London Corporation, and London & Partners, the network complements and interacts with Opportunity London, our existing capital investment platform.

“The NLA’s network is inherently international: as our survey reveals, many members undertake a significant proportion of their work overseas, while international delegations visit The London Centre each year to learn from the capital’s experience.”

Several elements form the core of the Built World Exchange:

- Strategic partnerships with global cities for London, and the UK, to develop long-term, sector-wide partnerships and skills transfer across the built environment, real estate and cultural sectors.
- City-to-city exchange programmes, connecting London with global counterparts on shared challenges such as retrofit, climate resilience, digital delivery, housing innovation, and mobility.
- A cross-sector leadership forum, convening key figures from government, industry, and academia to shape a unified voice for London's global built environment expertise, and to inform policy locally and nationally.
- A digital archive of London, UK and global case studies, showcasing exportable skills, best practice, and delivery models spearheaded by the capital's built environment. It will serve as a global shopfront for London's expertise.

The NLA's upcoming Built World Summit at Guildhall in June 2026 marks a major step in this direction. Bringing together hundreds of senior leaders from around the world, the Summit will convene global perspectives on resilience – urban, economic, and social – while showcasing London's leadership and its network of innovators. By pairing international voices with best practice case studies from the NLA's membership, the event will demonstrate the combined power of global insights and London's creative energy.

The Built World Exchange represents a natural evolution of the NLA's mission: from stewarding London's built environment to championing its international influence. By building the collaborative infrastructure the sector needs – and presenting London's strengths through a coherent, confident narrative – the NLA can help ensure that the capital remains not only a world leader in city-making, but a place where global ideas meet local expertise, and where the future of cities is imagined, tested, and shared.

RESEARCH DATA, RESULTS AND SUPPORTING EVIDENCE

Dr Adam Yousef
Head of Economics, Greater London Authority

The built environment sector as a key export driver

In the words of Winston Churchill, "we shape our buildings; thereafter they shape us".²⁴ These words ring true when it comes to the economic impact of the built environment sector in London and the UK. In 2025, the NLA, in partnership with GLA Economics and the London School of Economics, produced a seminal report on the extent to which this sector permeates our economic and social fabric.²⁵ We uncovered that the sector produces approximately £570 billion for the UK economy (nearly 25 per cent of total output and twice that of financial services). It accounts for nearly one in eight jobs across the UK. In London, it generates over £110 billion (about 19 per cent of London's total output) while creating over 620,000 jobs (11 per cent of the London total).

Another dimension via which the sector exerts its influence and potential is trade. Using data from His Majesty's Revenue Collection (HMRC) and the Office for National Statistics' (ONS) Inter-departmental Business Register, GLA Economics modelled and estimated the sector's annual exports. Methodologically, there are caveats to consider:

- The modelling is done for 2023, the most recent year of available data.
- For both London and the UK, the 2-digit ONS Sectoral Industrial Classification (SIC) codes used to identify the sector's industries in the previous NLA Report were used to isolate built environment sector exports to ensure consistency.
- For the UK modelling, it is assumed that the percentage of exports from built environment industries (out of total industry exports) is the same as the percentage of their output out of the total output for each industry. This is reasonable as exports and economic size correlate strongly.
- Export data at the regional level is more limited, and so for London, it was assumed that the share of each industry's exports out of total London exports is the same as that for the UK. While this won't necessarily be the case (London is more services and export-oriented than the UK), the difference is unlikely to be considerable.

Chart 1 looks at the UK's built environment exports by industry.

In 2023, the UK's built environment sector internationally exported over £168 billion of goods and services; this means that the volume of built environment exports exceeds the total output of the information and

£45.5
Billion

the amount of goods and services internationally exported by London's built environment sector

91.6%

of these exports are services while 7.7% are in mining, petroleum products and waste

18%

of London's total exports are from the built environment sector (£254.9 billion)

27%

of the UK's built environment exports are from London

Chart 1: UK built environment exports by industry group 2023

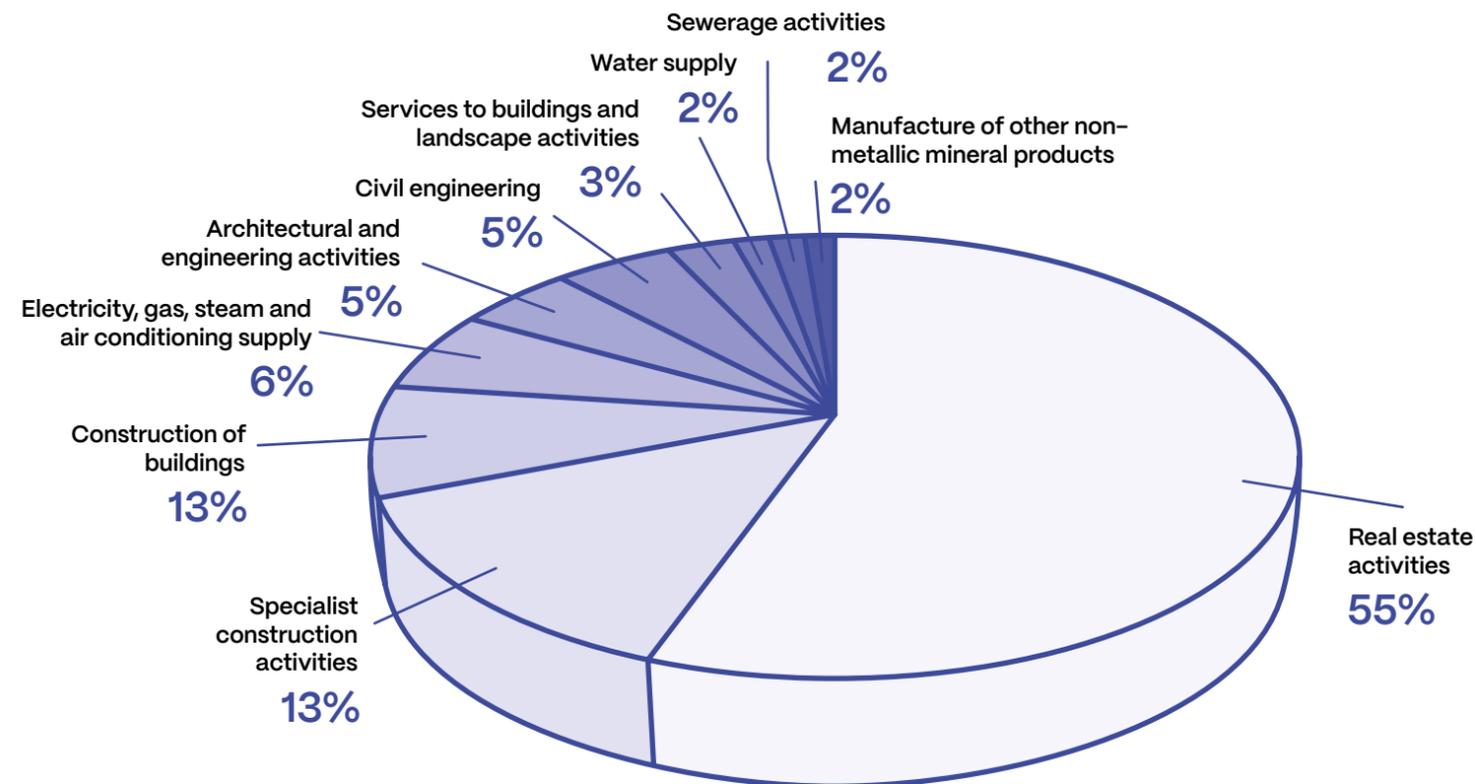
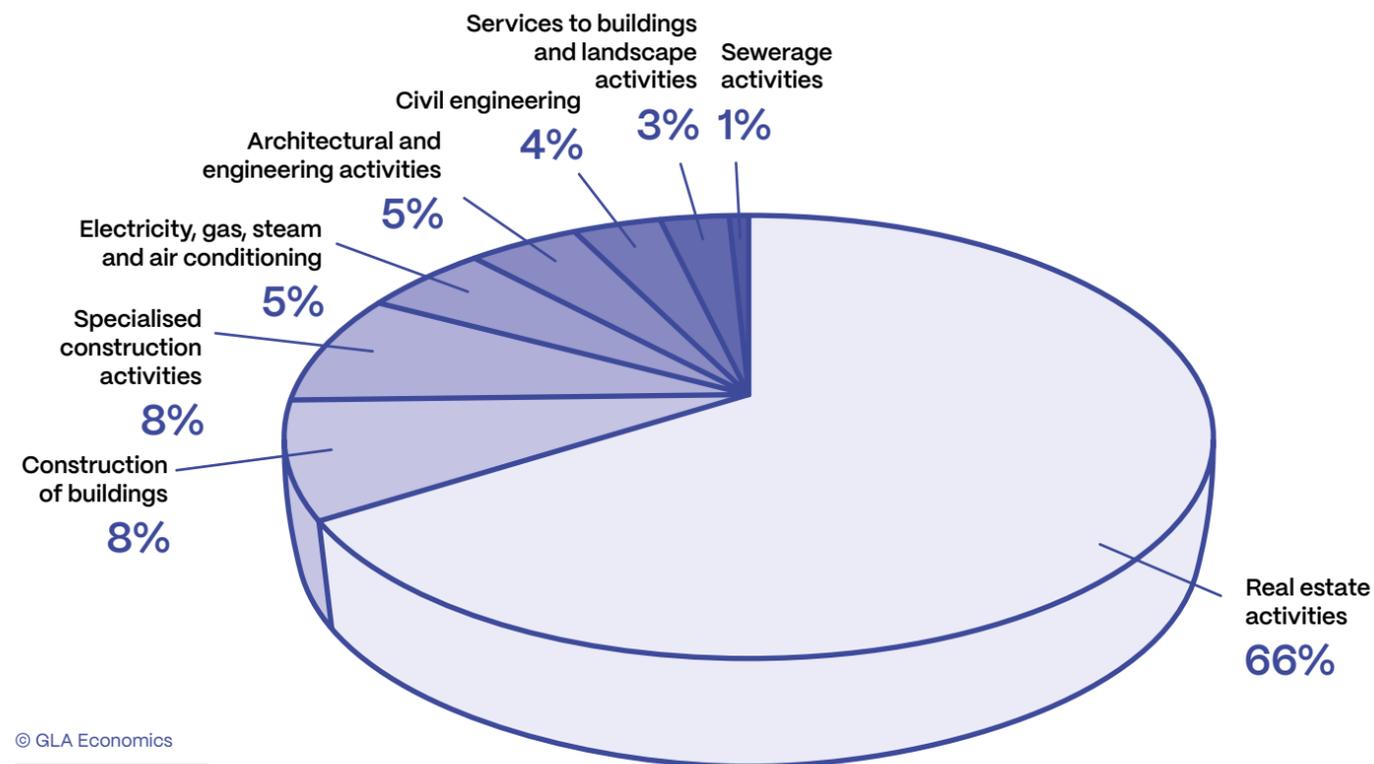


Chart 2: London built environment exports by industry group 2023



© GLA Economics

“In 2023, London’s built environment sector internationally exported over £45.5 billion of goods and services — more than the economic size of London’s accommodation and food services and wholesale and retail trade sectors.”

communication, education, and transportation sectors (individually). Built environment exports represented 20 per cent of total UK exports that year (£862 billion). Chart 2 profiles London’s built environment exports.

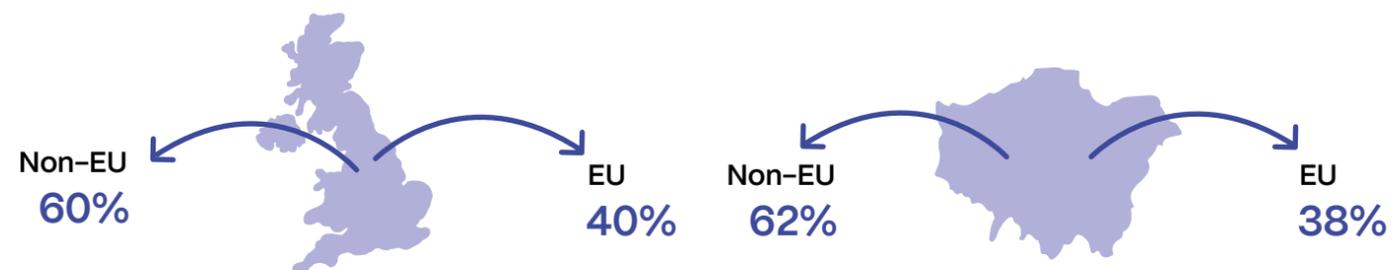
The profile of key built environment exporting industries for London is almost identical to that for the UK. In 2023, London’s built environment sector internationally exported over £45.5 billion of goods and services — more than the economic size of London’s accommodation and food services and wholesale and retail trade sectors (individually). 91.6 per cent of exports are services, while 7.7 per cent are in mining, petroleum products, and waste. Built environment exports represented 18 per cent of London’s total exports that year (£254.9 billion), and London’s built environment exports represent approximately 27 per cent of the UK’s. The modelling also estimated the share of exports by destination.

What is interesting is that most built environment exports are destined for non-EU countries beyond the USA (e.g., Asia, the Middle East, and Latin America). This observation is reinforced by anecdotal evidence provided by major multinational built environment firms to the NLA during an October 2025 roundtable. Moreover, London sends a bigger share of its built environment exports to the USA and non-EU countries than does the UK, while the UK exports a bigger share to China, Hong Kong, and Singapore than does London. The 20 largest importers of UK built environment exports represent 77 per cent of the UK’s total built environment exports, while these countries comprise only 65 per cent of London’s. This suggests that London has a more diverse export market for built environment exports than the UK.

This modelling presents several implications. First, the built environment sector is a critical driver of UK and London exports, and this is another dimension by which it supports productivity and economic growth. Second, the destination profile of the sector’s exports is diverse and goes beyond the USA and the EU — potentially providing new markets for the UK to promote trade and growth. Finally, the sector encompasses many industries that collectively contribute to its remarkable export potential. Therefore, supporting this sector’s export drive is crucial to fulfilling central government’s national growth mission and London’s Growth Plan ambitions.

Real estate appears as the single largest contributor to built environment exports, making up around 55 per cent of total export value. In national accounting terms this sits within SIC Division 68, which covers a wide span of activity including buying, selling and leasing property, renting and operating residential and non-residential buildings, and fee- or contract-based real estate services including agency services and property and asset management. While substantial, this share also means that nearly half of the built environment export value originates outside real estate, challenging the perception that the sector is overwhelmingly property-driven. This remaining share is generated by a diverse set of firms in architecture, engineering, construction and professional services, demonstrating that the UK exports far more than buildings alone.

Built environment exports by destination for London and the UK 2023



Export comparison of key sectors in the UK (2023)

UK	2023 £	London	2023 £
Built environment	168,198,233,780	Built environment	45,565,802,515
Financial and insurance services	120,300,000,000	Financial and insurance services	66,400,000,000
Agriculture and food	24,345,169,802	Agriculture and food	3,456,038,445
Mining, petroleum products and waste	35,585,458,679	Mining, petroleum products and waste	4,610,276,304
Pharmaceuticals	7,710,393,069	Pharmaceuticals	762,911,962
Electronics and electrical equipment	16,880,737,004	Electronics and electrical equipment	2,010,981,183
Motor vehicles and transport equipment	33,836,282,249	Motor vehicles and transport equipment	3,729,948,671
Aerospace and related machinery	35,325,186,697	Aerospace and related machinery	5,410,617,447

Dr Elizabeth Rapoport
Director, Polygon Place Strategy

The built environment sector in London and New York City: a comparison

London and New York City are both well-established centres of built environment expertise. This position is underpinned by a number of characteristics that reinforce each other: being home to firms with national and global reach; having large, active real estate markets that attract sustained capital investment; a strong track record of innovative projects; and a concentration of specialist skills and professional talent.

Together, these characteristics enable both London and New York City to concentrate investment, businesses and skilled people in a sector that both shapes the city itself and exerts influence well beyond it. Both cities have delivered projects that are now global reference points for the industry, from the regeneration of King's Cross to the pedestrianisation of Times Square.

Comparing London and New York City offers insight into London's role and status as an international centre of built environment expertise. This analysis draws on economic data for both cities, alongside insights from the NLA's membership.

Economic contribution of the built environment sectors in New York City and London

To compare the economic value of the built environment sector in the two cities, the statistical definition developed in NLA's *The Built Environment Sector* report for London was adapted to the New York City context.²⁶ This enabled a like-for-like comparison of economic output and employment.

London's built environment sector accounts for a significantly larger share of overall economic output than New York City's.²⁷ In London, the sector generates around one-fifth of total city gross value added (GVA), compared with under one-tenth of New York City's gross domestic product (GDP).²⁸ This indicates that the built environment is structurally more central to London's economy.

In employment terms, the sector accounts for a slightly higher share of jobs in London than in New York City. Around 11 per cent of London's workforce is employed in the built environment sector, compared with approximately 8 per cent in New York City.

While these figures should be interpreted with some caution given differences in data sources and definitions, they suggest that the sector employs a broadly similar share of the workforce in both cities but generates a much larger share of economic output in London — pointing to higher value generated per job.

London	New York City
Total built environment GVA / GDP (millions)	
£111,224	\$97,375
Region GVA / GDP (millions)	
£577,141	\$1,285,738
Built environment share of region GVA / GDP	
19.3%	7.6%
Total built environment jobs	
629,700	365,060
Regional jobs	
5,803,550	4,684,200
Built environment share of total regional jobs	
10.9%	7.8%



Sub-sector comparison: real estate

Digging deeper into the sub-sectors that make up the built environment reveals important differences between the two cities. In both London and New York City, real estate and real estate-adjacent activities dominate overall economic output. In London, real estate activities account for around 66 per cent of built environment sector GVA (including imputed rent), but only about 25 per cent of sector employment.²⁹ In New York City, real estate (also including rent) generates around 47 per cent of the sector's contribution to GDP (using a conservative estimate), while accounting for approximately 33 per cent of jobs.

This suggests different underlying dynamics. In New York City, real estate appears to employ more people relative to the value it generates, reflecting a greater role for labour-intensive activities such as leasing, property management, brokerage, and building operations. In London, by contrast, real estate's economic contribution is driven less by employment in property services and more by the value and income of property itself, including rents and imputed rent. In other words, a larger share of the sector's contribution in London comes from owning and earning income from buildings, whereas in New York City it appears to come more from the work of developing, operating, and servicing the city.

This finding aligns with a view commonly expressed by the NLA's members. London's built environment sector is closely interdependent with the city's role as a global hub for financial and professional services, as well as its attractiveness as a destination for international capital investment in real estate and infrastructure.

Sub-sector comparison: architecture and engineering

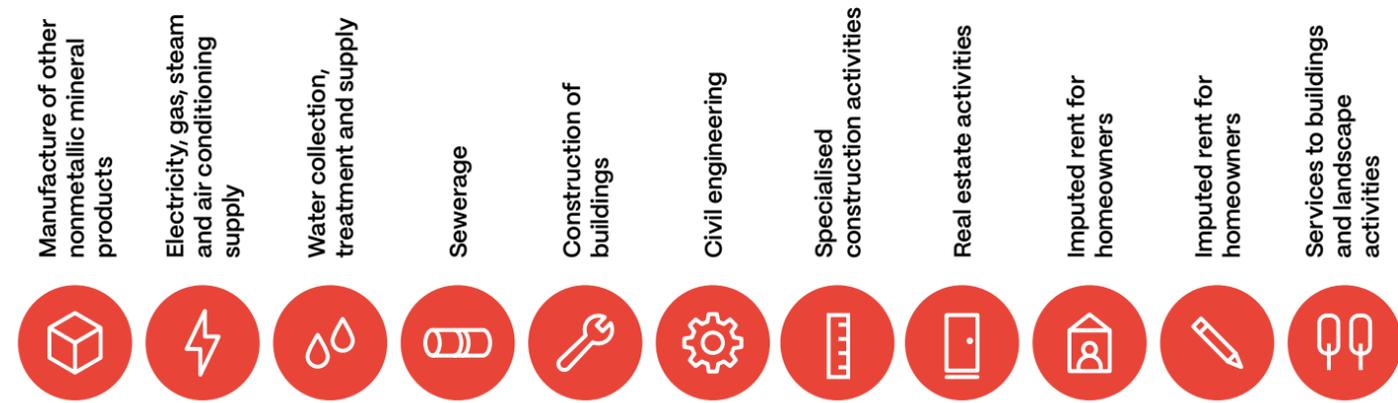
If the real estate sub-sector helps explain why the built environment is so economically significant in London, the architecture and engineering services sub-sectors help explain London's distinctiveness as a centre of expertise. Both the data and the experience of the NLA members suggest that this part of the sector plays a more central role in London's built environment than in New York City.

Both London and New York City can be seen as major repositories of specialised built environment expertise, reflected in the scale of their architecture, engineering, and related professional services sub-sectors. In London, these sub-sectors account for around 5 per cent of built environment GVA and 18 per cent of built environment employment. In New York City, they comprise around 7 per cent of built environment GDP (on a conservative estimate) but just over 10 per cent of sector jobs.

This indicates that architecture and engineering contribute a slightly larger share of built environment economic output in New York City, while employing a significantly larger share of the workforce in London. Taken together, this points to a deeper concentration of specialist professional capacity in London.

This aligns with views expressed by the NLA members: that London's role as a global investment destination, combined with the scale, complexity, and intensity of development in the capital, has sustained demand for high-

Built environment subsector



Economic output of the built environment sector in New York and London (2023)

London share of built environment GVA



New York City share of built environment GDP

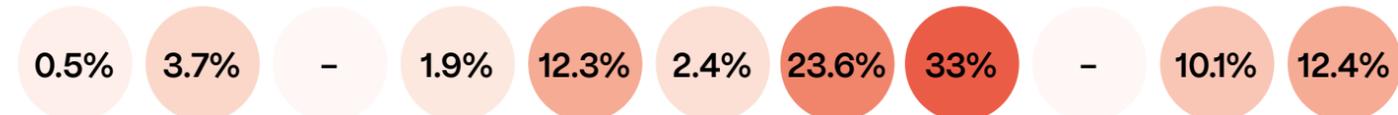


Employment in the built environment sector in New York and London (2023)

London share of built environment jobs



New York share of built environment jobs



quality design and professional services. In turn, this has helped position London as an incubator for innovation and expertise in the built environment.

London's distinctiveness: an ability to experiment, adapt, and export

The experiences of the NLA's members help explain how London's concentration of professional expertise translates into international influence. John Bushell highlights that while both London and New York City function as important knowledge hubs within the firm, London is "much more unquestionably receptive" to new ideas. He attributes this to the city's discretionary planning system and performance-based regulation, which he views as a clear competitive advantage.

This relative openness allows a wider range of design and technical solutions to be explored on London projects. As a result, London provides a particularly fertile environment for design professionals to experiment with, adapt, and hybridise international typologies, standards, and expertise. Over time, this has pushed architects, engineers, and clients to build on and integrate North American typologies and European know-how in ways that are specific to the London context.

These capabilities have subsequently become an important part of the offer that London-based firms sell internationally. Respondents to NLA's member survey for Connected Capital ranked design quality and creativity, experience of complex projects, reputation and brand, and net zero expertise as the strongest drivers of international success.

Another factor reinforcing this dynamic is London's strong educational ecosystem and its ability to attract international talent. The city draws a diverse pool of students and practitioners from around the world, contributing to a labour market with unusually high levels of design literacy and critical thinking. Employers are keen to draw on this depth and diversity of expertise: 70 per cent of respondents to NLA's survey report that between 10 per cent and 24 per cent of their London workforce is recruited from outside the UK.

London's international orientation

While both are global cities, London's built environment sector appears to be more internationally orientated than New York City's, whose activity is more strongly shaped by domestic delivery. This reflects the different national contexts in which firms operate. A practice based in New York City has access to a vast domestic market; for London-based firms, the UK market is significantly smaller in relative terms.

Differences in sector composition are consistent with this pattern. London's built environment workforce is more heavily weighted towards architecture, engineering, and professional services, while New York City's has a larger share of employment in construction and building operations. As construction activity is largely locally delivered, whereas design and technical consultancy are among the sector's more tradable activities, this mix is in line with London functioning as a more international-facing hub for built environment expertise.

This is reinforced by the NLA's member survey. Around 77 per cent of respondents report delivering live international projects from London, and of those, 73 per cent expect their international workload to increase over the next five years.

This international orientation is reflected in London's export profile. Analysis by GLA Economics shows that in 2023 London's built environment sector exported over £45.5 billion internationally, with services accounting for 91.6 per cent of this activity.³⁰ Built environment exports made up around 18 per cent of London's total exports and approximately 27 per cent of the UK's built environment exports. While comparable city-level data is not available for New York City, these figures underline the scale at which London's built environment sector operates internationally and its role as a major exporter of design, technical, and professional expertise.

London's ability to assimilate and adapt: Canary Wharf

Canary Wharf was conceived as a place where London could build at a scale and in a spatial configuration that the historic grain could not easily accommodate. Influenced by North American financial centres it imported the high-rise office typologies and large dealer floors built to "best-in-class" expectations around specification, servicing, and prestige.

John Bushell frames this as more than a one-way import. London's value, as KPF describe it, is its capacity to assimilate, to take US-driven commercial typologies and recombine them with continental European approaches to building services and environmental performance, enabled by a planning and regulatory culture that is more discretionary and performance-led than many peer cities. That hybridisation then travels back out. In this sense, London and New York City operate as "twin anchors" and "repositories of knowledge", with solutions tested in London feeding into later work elsewhere, including New York City.

Over successive cycles, Canary Wharf has also become more distinctly London in character and intent. John Bushell describes a district that "hasn't stood still": it moved beyond a finance-led core towards mixed-use (notably at Wood Wharf), absorbed shifting occupier demand (including tech), and is now evolving again towards life sciences and research-led space.

In that sense, Canary Wharf is a microcosm of London's built environment economy. It is a place where land, planning risk, infrastructure, and design expertise are converted into high-value urban assets and where the built environment evolves in tandem with the city's economic base.

Conclusion: London's global role in the built environment

For global built environment firms, both London and New York City derive their strength from the flows of people, projects, and ideas they generate. London, however, stands out as a leading global centre of built environment expertise and a major destination for investment. Its distinctiveness lies in its ability to generate and absorb knowledge, to test and refine new approaches through complex projects, and to export design and professional services internationally.

"London and New York City operate as 'twin anchors' and 'repositories of knowledge', with solutions tested in London feeding into later work elsewhere, including New York City."

INTERNATIONAL PROJECT SHOWCASE

- Adaptive reuse and retrofit
- Culture, leisure and public realm
- Innovation & technology
- Placemaking & mixed-use regeneration
- Sustainable, nature-led design
- Transport-oriented design

The following showcase of projects provides a snapshot of the international work currently being delivered by the NLA's members. These projects represent work undertaken after 2020, spanning stages from initial proposal and design through to construction or completion.

All projects featured in this showcase were submitted via a call for submissions conducted by the NLA in autumn 2025.

View the online project directory at nla.london/projects

ADAPTIVE REUSE AND RETROFIT

This theme reflects a global shift away from demolition-led growth towards reuse, renewal and long-term stewardship of existing assets. As cities grapple with climate targets, constrained land supply and the social value of heritage, adaptive reuse has become one of the most technically demanding and strategically important areas of city-making. The projects grouped here demonstrate how London-based teams operate at the intersection of heritage, sustainability, commercial viability and contemporary design, often within highly regulated and politically sensitive contexts.

London's expertise in this area has been forged through decades of working in a dense, historic city where change is negotiated rather than imposed. The projects exemplify skills in lifecycle carbon assessment, complex phasing, heritage-led placemaking and the integration of new uses into old fabric. What London exports through this work is not a single design language, but a methodology: how to unlock value from constrained sites, extend asset life, and reconcile environmental ambition with cultural continuity and market realities.

KULAN

Status: Proposed

Completion: Masterplan completed in 2023

Scale: 116,000 sqm

Location: Gothenburg, Sweden

Continent: Europe

Use: Mixed-use masterplan

Role of the London-based team:
Architecture and urban design

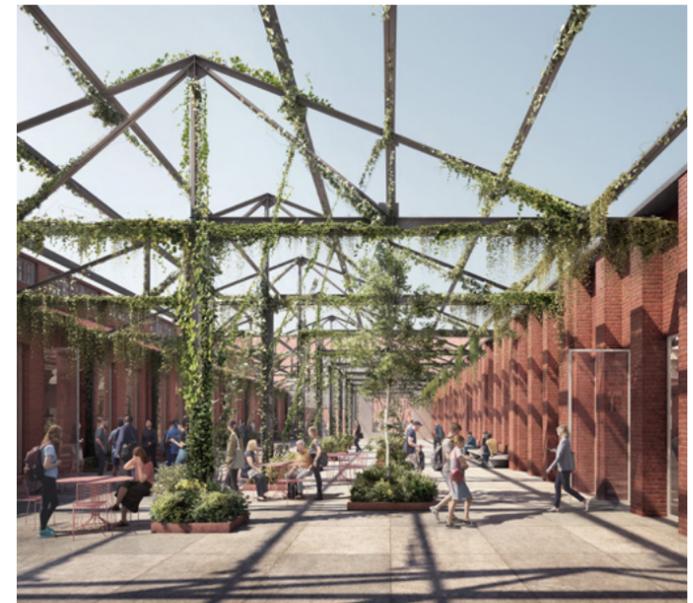
Project Team:

Architects: Bell Phillips, Liljewall Arkitektur

Clients: Stena Fastigheter, Gothenburg City Council

Situated along the river Savean in the northern part of Gothenburg, this historic factory complex consists of a series of striking industrial buildings that date back to the early 20th century. Originally built in phases, the factory served as a hub for both the working and cultural life of the region. However, the ball bearing factory has since been replaced by more modern facilities nearby, leaving behind a rich legacy that now calls for a fresh vision. In collaboration with Stena Fastigheter and Gothenburg City Council, Bell Phillips has been instrumental in developing a placemaking vision for the site's future. This vision is supported by a comprehensive framework outlining the steps needed to achieve a thriving, multi-use community.

The approach has been informed by extensive research into the best examples of industrial regeneration across Europe, alongside a detailed analysis of the site's history, architectural fabric, and context. The development plan encompasses approximately 1,000 new homes alongside a linear riverside park to enhance public access and provide green space for residents and visitors. Key to the vision is the renovation of the most significant industrial buildings, which will be re-purposed for a mix of workspace, cultural, retail, and education facilities. The aim is to breathe new life into this historically rich site by celebrating its industrial heritage and reveal the unique character of the factory complex. In doing so, Bell Phillips seek to transform the site into an exciting new destination which will play a central role in the broader regeneration of northern Gothenburg.



2150 LAKE SHORE

Status: Proposed
Completion: 2055
Scale: 705,000 sqm
Location: Toronto, Canada
Continent: North America
Use: Mixed-use masterplan
Role of the London-based team: Architecture and urban design (e.g. masterplanning, interiors, landscape), Professional consulting services

Project Team:
Client: First Capital REIT
Architect (Masterplan): Allies and Morrison
Landscape Architect: GROSS MAX
Landscape Architect: DTAH
Planning: Urban Strategies
Bioclimatic Engineer: AKT II
Structural Engineer: Entuitive

In Toronto, this transformative masterplan reimagines the former Christie Cookie factory site as a vibrant, transit-oriented waterfront district. Featuring 29 mixed-use buildings up to 67 storeys, the development integrates homes, workplaces and community spaces within a pedestrian-friendly layout. 40 per cent of the site is dedicated to parks, squares and public spaces, creating a dynamic and resilient neighbourhood.



THE AVICII ARENA

Status: Built
Completion: 2025
Scale: 76,460 sqm
Location: Stockholm, Sweden
Continent: Europe
Use: Culture & Entertainment
Role of the London-based team: Architecture and urban design, Professional consulting services

Project Team:
Client: Stockholm Globe Arena Fastigheter (SGAF) (fully owned by the city of Stockholm)
Operator Stockholm: Live/ASM Europe
Architects: HOK London (S&E) in association with C.F. Møller Architects
Structure engineering: Schlaich Bergermann Partner (SBP)
MEP Engineering: Rambøll
Acoustics Engineering: Efterklang
Specialist lighting: Light Bureau
Cost Consultant: Afry
Heritage Advisor: Mattias Eklund
Project Management Consultancy: Legends

The Avicii Arena renovation in Stockholm, Sweden, honours its heritage while modernising the experience. The design achieved this through innovative re-use of most of the existing building, combined with new components, creating a bespoke solution that ensures the venue remains forward-looking, flexible, and adaptable to a variety of needs. This comprehensive transformation was carried out by the international design team comprising of HOK, C.F. Møller Architects, and Schlaich Bergermann Partner (SBP) working for the client Stockholm Globe Arena Fastigheter (SGAF) and delivered by the contractor NCC. HOK London based expertise played a crucial role in shaping the delivery.

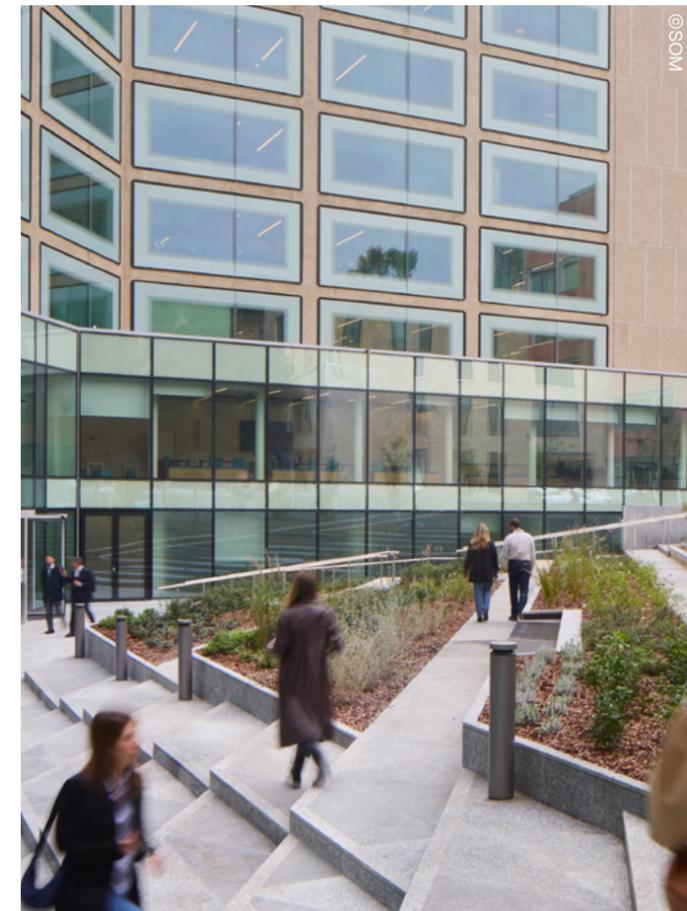


CORSO ITALIA 23

Status: Built
Completion: 2024
Scale: 46,500 sqm
Location: Milan, Italy
Continent: Europe
Use: Commercial
Role of the London-based team: Architecture and urban design

Project Team:
Developer: PIMCO Prime Real Estate
Owner: Allianz SpA
Architect: Skidmore, Owings & Merrill (SOM)
Project Manager: Jacobs Italia
Construction Company: Colombo Costruzioni S.p.A
Local Architect: Proger SpA, BMS Progetti
Structures: BMS Progetti
Heritage Consultant: TA Architettura
Sustainability: Manens-Tifs
Lighting Design: Cannata & Partners
Vertical Transportation and Traffic: Systematica
Fire and Life Safety: Jensen Hughes

Corso Italia 23 is a reimagined 1960s office complex in central Milan, occupying an entire urban block. The project celebrates the city's modernist heritage while setting new benchmarks for sustainability, wellbeing, and workplace design. Around 70 per cent of the campus's existing structures are retained whilst new enhanced city connections and upgraded amenities foster a vibrant, people-focused campus. Exemplifying environmental, social, and digital sustainability, Corso Italia 23 has earned LEED Platinum, WELL Gold, WiredScore Gold, and EPC A+ certifications.



ILO

Status: Proposed
Completion: Masterplan completed in 2025
Scale: 120,000 sqm
Location: Brussels, Belgium
Continent: Europe
Use: Mixed-use masterplan
Role of the London-based team: Architecture and urban design, Technology, product and material knowledge (BIM, digital modelling, AI, data analytics)

Project Team:
Client: Cityforward / Whitewood Design
Architects: a2o (Lead) (Brussels / Hasselt), Morris+Company (London and Copenhagen), VELD (Brussels)
Landscape Architect: TN+ (Paris)
Structural Engineering: Greisch (Brussels)
MEP Engineer: CES (Brussels)

ILO forms part of the 'Cityforward' mixed-use programme to redevelop the wider Brussels European Quarter. This project comprises the redevelopment of a full city block (office use only as existing) into a mixed-use neighbourhood comprising workplace, residential and community / retail uses. The project was won in an open international competition in collaboration between a2o (Brussels); Morris+Company (London); and VELD (Brussels). Circularity is at the core of the vision, optimising retention, adaptive re-use and circular design principles across a biodiverse landscape-first design approach.



LE SCHUYLKILL

Status: Under construction

Completion: 2027

Scale: 41,000 sqm

Location: Monte Carlo, Monaco

Continent: Europe

Use: Residential

Role of the London-based team:

Architecture and urban design, Construction and project management, Technology, product and material knowledge

Project Team:

Architect: Zaha Hadid Architects

Local Architect: Square Architecte

Structural Engineers: Eckersley O'Callaghan and Oteis

M&E / Building Services Engineering: INGETEC

Cost Consultant: VPEAS

Environmental Consultant: AIA

Façade Engineering:

Eckersley O'Callaghan

Fire Engineering: INGETEC

Landscape Consultant: Jean Agapit

Lighting Design: 8'8"

Acoustic Consultant: INGETEC

Project Manager: MIP

Le Schuyllkill is the comprehensive renewal of Monaco's first high-rise, transforming a 1963 landmark into a contemporary, low-carbon residential tower. The project preserves around 75 per cent of the existing concrete structure, significantly reducing embodied carbon while upgrading it to current seismic standards. A new facade with undulating balconies and cascading terraces improves performance and identity, while renewable energy from Monaco's Seawater Circuit replaces oil-based systems. Interiors, amenities and circulation have been fully reconfigured to enhance comfort, accessibility and environmental efficiency.



MALMÖ STADSTEATER HIPPODROMEN

Status: Built

Completion: 2023

Scale: 9,995 sqm

Location: Malmö, Sweden

Continent: Europe

Use: Culture & Entertainment

Role of the London-based team:

Architecture and urban design

Project Team:

Client: Malmö Stadsteater & Malmö Stad

Project Manager: Malmö Stadsfastigheter (Pet er Hingström)

Lead Architect: Haworth Tompkins

Technical Architect: White Arkitekter

Contractor: Team Skåne

Theatre Consultant: AIX Arkitekter AB

Structural Engineer: Structor

Services Engineer: Sweco

Acoustic Engineer: Norconsult

Signage & Wayfinding Design:

Urgent & Haworth Tompkins

Graphic Design: Urgent

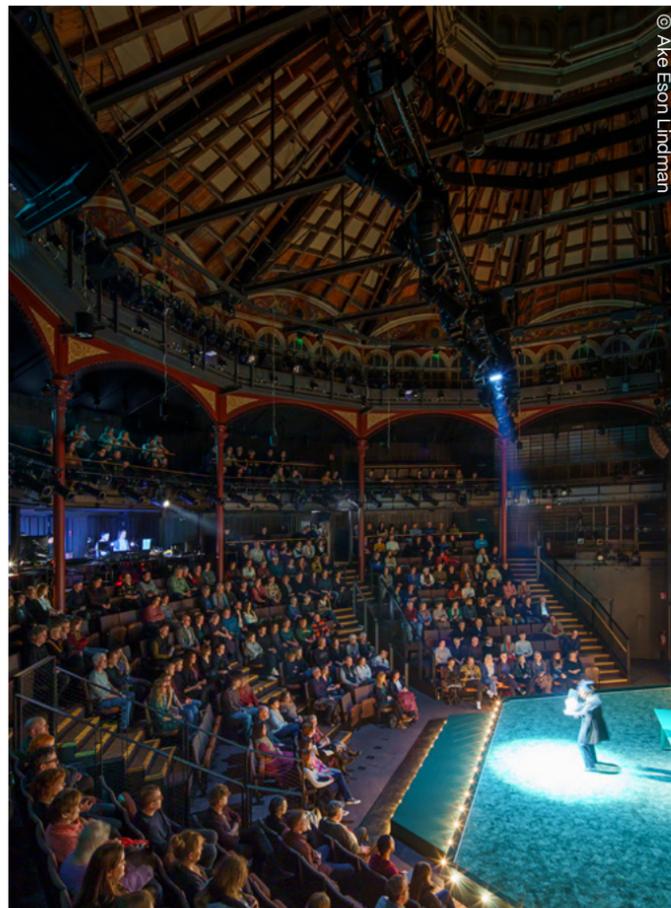
Heritage Consultant: Anders Rejnert

Fire Engineer: FSD

Furniture & Furnishings:

Mai Jørgensen & Malene Holst

Major refurbishment of 19th century Swedish theatre, opening the theatre to the life of the city. A new auditorium offers an intimate, flexible space, merging historical and contemporary architecture. A glazed courtyard links it to the street, providing an events space, and connection between a new entrance, the refurbished theatre foyers, a cafe & children's workshop. The theatre is now more porous, accessible & flexible, reviving the theatre as a vibrant civic and cultural landmark.



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CULTURE, LEISURE AND PUBLIC REALM

Cultural, leisure and public realm projects are increasingly central to how cities define identity, attract investment and build civic life. Globally, there is growing recognition that stadiums, theatres, cultural institutions and public spaces are not standalone buildings but anchors for wider urban transformation. The projects curated under this theme demonstrate how London-based practices design for intensity of use, emotional experience and long-term public value, often at landmark scale.

London's export strength lies in its ability to integrate architecture, engineering, placemaking and operations into cohesive civic destinations. These projects show expertise in managing large, complex teams, designing for diverse audiences, embedding climate-responsive design, and creating spaces that function economically while delivering social and cultural return. What is being exported is a deep understanding of how culture and public life shape cities, and how to translate that understanding into buildable, durable, and context-sensitive outcomes.

AL-AHLY STADIUM

Status: Proposed
Completion: 2029
Scale: 84,000 sqm
Location: Cairo, Egypt
Continent: Africa
Use: Culture (Stadium)
Role of the London-based team: Architecture and urban design, Professional consulting services
Project Team:
Client: El Qalaa El Hamraa
Architect: Gensler
Engineer: Buro Happold

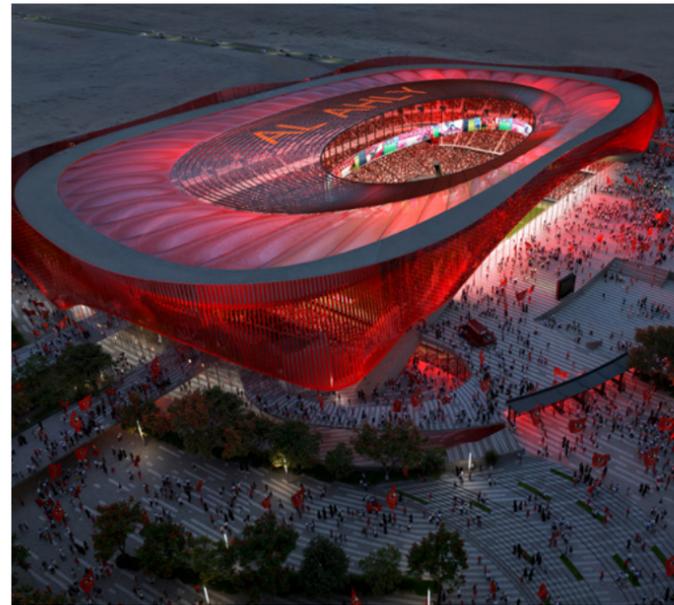
In partnership with El Qalaa El Hamraa and Buro Happold, Gensler has developed a concept design for a world-class, ground-up stadium for the club that redefines the fan experience, drives economic growth, and sets a new benchmark in sports architecture globally.

Thirty years in the making, the design marks a transformative opportunity for Al-Ahly to finally have a stadium they can call their own. The 42,000-seat stadium serves as a gateway to Egypt's bustling capital, located along the motorway connecting Cairo and Alexandria. One of the stadium's defining architectural features is its massive structural arch, which makes it instantly recognisable from all viewpoints.

The design features several innovative solutions and embedded technology, such as a sunken pitch and asymmetric bowl due to height restrictions imposed by flight paths with the nearby Sphinx International Airport. This creates a dynamic match-day atmosphere while also leveraging cooler earth temperatures to reduce ambient heat, achieving sustainability through passive design measures. The integration of a digital facade with options for digital projections transforms the stadium into an iconic landmark, illuminating Cairo's skyline at night.

Inside, double-tiered stands amplify the energy of supporters and ensure most fans are close to the action. Premium areas, like The Field VIP, offer an exclusive atmosphere with gourmet dining, access to the players' tunnel, and prime seating, allowing guests to enjoy match day in comfort and style.

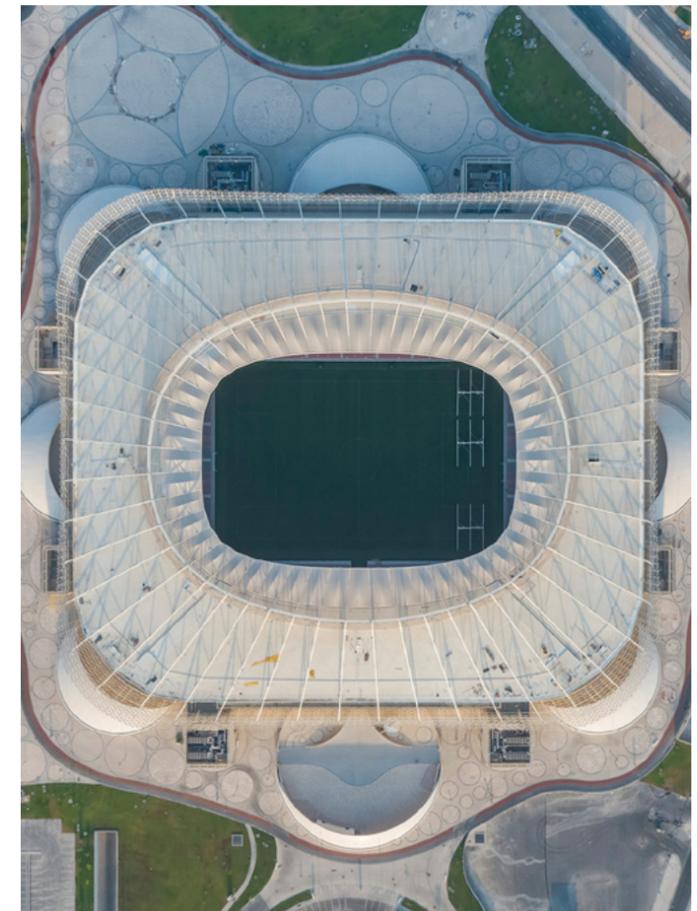
The Al-Ahly Stadium will anchor a transformative sports city masterplan, which includes a university, hospital, and mosque, enhancing Giza's and Cairo's tourism portfolio. With multifunctional spaces that can host national events and concerts, the stadium aims to become a dynamic, year-round venue that transcends football and drives significant economic growth in the region by attracting sports fans, tourists, and eventgoers.



AHMAD BIN ALI STADIUM

Status: Built
Completion: 2020
Scale: 690,000 sqm
Location: Al Rayyan, Qatar
Continent: Middle East
Use: Culture & Entertainment
Role of the London-based team: Architecture and urban design
Project Team:
Client: The Supreme Committee for Delivery & Legacy
Architect and Lead Designer: BDP
Interior designer: KSS
Main Contractor: Larsen & Tourbro
MEP engineering, fire, acoustics, building physics: Hoare Lea
Structural engineering (steel) and roof design: Schlaich Bergermann Partner
Structural Engineering (concrete): Matejko & Wesofy Biuro
Crowd flow analysis: Momentum Transport Consultancy
Food, beverage and waste: Tricon Foodservice Consultants
Security: D J Goode & Associates

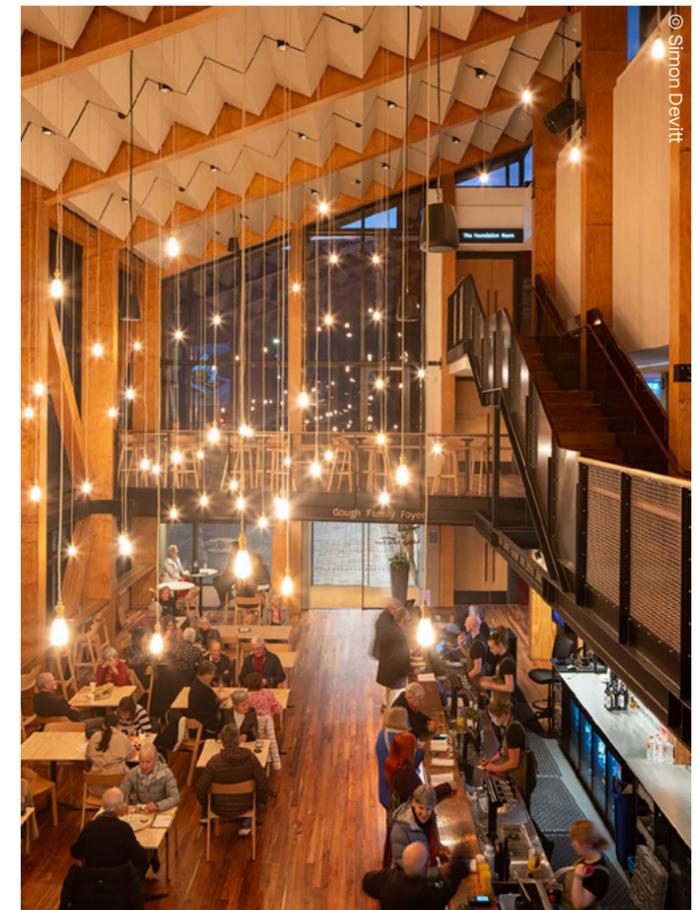
Ahmad Bin Ali Stadium is one of the venues for the 2022 FIFA World Cup. BDP were appointed Lead Designer and Architect for the Stadium, training facilities and the masterplan surrounding 69-hectare precinct. The conceptual theme for the site is the Desert. This translates into a masterplan concept of a caravan or journey in the desert landscape configured using a circle packing geometry.



THE COURT THEATRE

Status: Built
Completion: 2025
Scale: 3,700 sqm
Location: Christchurch, New Zealand
Continent: Australasia
Use: Culture (Theatre)
Role of the London-based team: Architecture and urban design
Project Team:
Architect (Design Lead): Haworth Tompkins
Architect (Technical / Delivery Lead): Athfield Architects
Contractor: Hawkins
Theatre Consultant: Charcoalblue
Structural Engineer: Ruamoko Solutions Services
Civil & Fire Engineers, Lighting: Cosgroves
Acoustic Engineer: Marshall Day Acoustics
Landscape Architect: Botanic Landscape Architects
Mana Whenua Design Partner: Matapopore
Facade Engineer: Mott MacDonald
Facade Structural Engineer: BG&E
Quantity Surveyor: AECOM

A world-class, sustainable theatre, The Court is a fully integrated production house with a 379-seat main playhouse, a 130-150-seat studio theatre, workshops, and in-house creative facilities. Purpose-built for creativity and collaboration, it unites performance, production, and community within a single space. Designed with openness and sustainability at its core, The Court celebrates the craft of theatre-making while standing as a cultural landmark and a powerful symbol of regeneration in Christchurch's vibrant, revitalised arts precinct.



DALIAN SUOYUWAN FOOTBALL STADIUM

Status: Built
Completion: 2023
Location: Dalian, China
Continent: Asia
Use: Culture & Entertainment
Role of the London-based team: Architecture and urban design (e.g. masterplanning, interiors, landscape)

Project Team:
Architect: BDP
MEP Engineering, Facade Engineering and Structural Engineering: Buro Happold

The spectacular new 63,000-seat Suoyuwan Stadium is set to host the AFC Asian Cup in 2023 and will provide a modern home to the Dalian Pro FC who play in the top tier of Chinese football, the Chinese Super League. Inspired by the stadium's unique location on Dalian's breath-taking waterfront, the facade gives a shimmering feel to the building as the different shells appear to float and twist within each other.



DIRIYAH GATE BUJAIRI F&B FOOD HALL

Status: Under construction
Completion: 2033
Scale: 15,000 sqm
Location: Riyadh, Saudi Arabia
Continent: Middle East
Use: Retail & Hospitality
Role of the London-based team: Architecture and urban design

Project Team:
Architect: BDP

Bujairi Food Hall is being developed within the Al Bujairi F&B precinct within the Diriyah Gate development in Riyadh. The interior design and fit-out will be designed to serve as an immersive and high-end culturally themed venue near the UNESCO heritage site At Turiaf. The Food Hall's interior design reinterprets Najdi and Diriyah cultural design traditions using modern approaches to create a unique character and brand for the project.



ECHO

Status: Built
Completion: 2025
Scale: 12sqm
Location: Seoul, South Korea
Continent: Asia
Use: Installation
Role of the London-based team: Architecture and urban design, Technology, product and material knowledge

Project Team:
Architect: Bureau de Change Architects

Echo, an installation for the Seoul Biennale, draws inspiration from Korean hanok houses and the artisanal techniques of Jewajang (Roof Tile Making), Beonwajang (Tile Roofing), and Daemokjang (Traditional Wooden Architecture), to create a contemporary design formed of multiple, layered elements. The surface echoes the interlocking intricacy of timber joinery, and the rhythmic layering of traditional clay tiles found in ancient Korean roofs. Reclaimed clay roof tiles, sourced from demolished hanok buildings, are crushed and blended into the mix, giving the surface not only a material authenticity but also a chromatic variation that shifts across the facade.

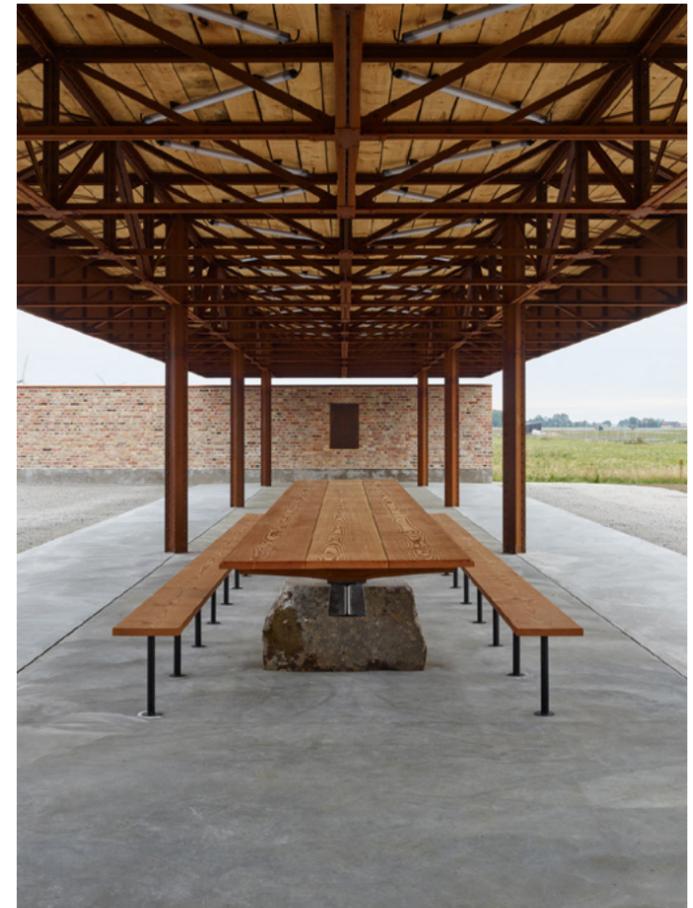


HAGE

Status: Built
Completion: 2021
Scale: 1,600 sqm
Location: Lund, Sweden
Continent: Europe
Use: Public Realm
Role of the London-based team: Professional consulting services

Project Team:
Client: Lunds Domkyrka (Lund Cathedral)
Architect: Brendeland & Kristoffersen
Engineer: Price & Myers

Hage, a walled public garden in Råången, Lund, marks the first step in developing a 10-hectare site owned by Lund Cathedral. Once farmland, the site will evolve into a new neighbourhood with homes and parks. Defined by recycled brick walls and a Corten steel canopy, Hage provides a shared space for gathering and reflection, establishing a social heart for the future community.



MERCEDES-AMG WORLD OF PERFORMANCE

Status: Under construction
Completion: 2027
Scale: 45,000 sqm
Location: Qiddiya City, Saudi Arabia
Continent: Middle East
Use: Culture & Entertainment
Role of the London-based team: Architecture and urban design

Project Team:
Architect: Benoy

Mercedes-AMG World of Performance will be a flagship attraction in Qiddiya City, KSA, spanning 45,000 sqm over nine floors and featuring over 20 interactive motorsport-inspired exhibits. Positioned alongside the Speed Park Track, one of the world's fastest circuits, the design fuses the dynamism of motorsport with architectural storytelling to deliver a place of exploration and cultural engagement. An integrated network of streets interact with the track, offering vibrant social spaces where visitors can stroll, dine, and immerse themselves in the culture of performance. Set against the Tuwaiq Mountains, the centre establishes a global benchmark for entertainment and cultural engagement.



NIKOS KOULIS JEWELLERY STORE

Status: Built
Completion: 2024
Scale: 50 sqm
Location: Athens, Greece
Continent: Europe
Use: Retail & Hospitality
Role of the London-based team: Architecture and urban design, Technology, product and material knowledge

Project Team:
Architect: Bureau de Change Architects

The irregularly shaped window offers only glimpses of the interior. Surrounding this window, the facade takes its proportions from the nearby Athenian city walls and reproduces them in aluminium. At points, the aluminium is embossed with a pattern reminiscent of the intricate detailing found on 19th Century jewellery boxes. Where the aluminium meets the street, the material shifts to solid slabs of travertine and marble, framing the window and merging the contemporary with the ancient. The main mezzanine wall, which sits almost as an internal facade, is formed from a series of elongated prisms. The prisms consist of two highly polished metal surfaces and a third illuminated surface.

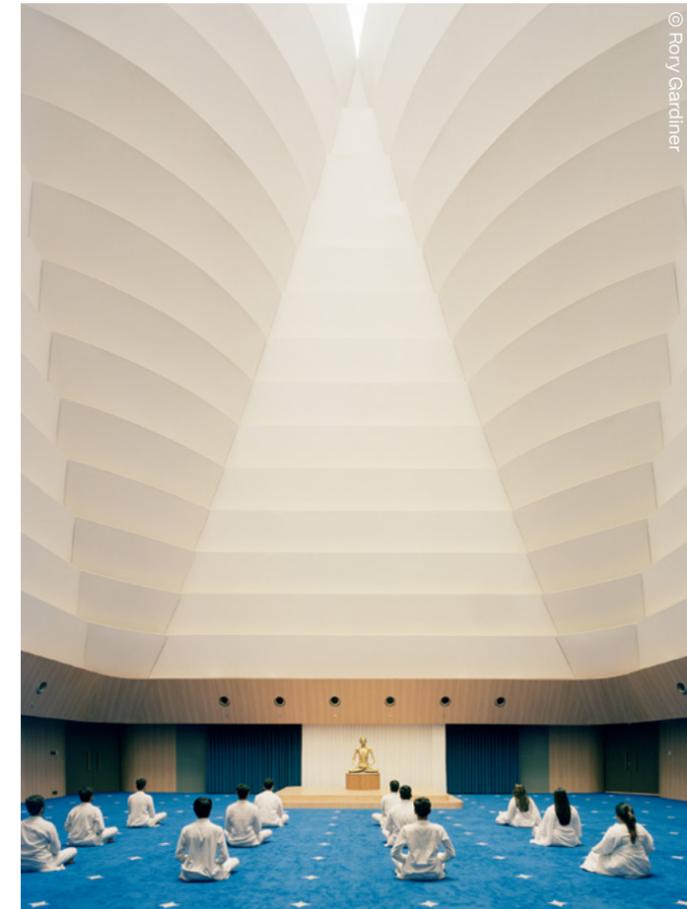


SHRIMAD RAJCHANDRA ASHRAM SATSANG HALL

Status: Built
Completion: 2024
Scale: 16,000 sqm
Location: Dharampur, India
Continent: Asia
Use: Culture & Entertainment
Role of the London-based team: Architecture and urban design

Project Team:
Client: Shrimad Rajchandra Mission
Architect: Serie Architects
Civil and Structural Engineer: LERA, NYC
Mechanical and Electrical Engineering: ARKK Consulting
Quantity Surveying: Gleeds Consulting
Facade Consultant: BES Consultants
Acoustics: Munro Acoustics LLP
Lighting: T2 Consulting
Auditorium Consultant: RMM

Architecture studio Serie Architects has used interlocking walls cloaked in hand-chiselled bricks to outline Raj Sabhagruh, a complex dedicated to Jainism in Dharampur, India. Raj Sabhagruh comprises 16,000 square metres of space for discourse, study, rest and meditation, and takes visual cues from the architecture of India's Jain temples.



INNOVATION & TECHNOLOGY

This theme captures how London's built environment sector applies advanced digital tools, systems thinking and interdisciplinary innovation to solve complex spatial, environmental and operational challenges. As buildings and districts become more technologically sophisticated, from healthcare and science clusters to high-performance commercial towers, the role of design teams has expanded beyond form-making into data-informed design, performance and long-term adaptability.

The projects grouped here exemplify London's leadership in digital design, BIM-enabled delivery, parametric modelling, smart building systems and the integration of technology with human-centred design. London exports not just technical capability, but an innovation culture shaped by close proximity to global finance, academia and research institutions. This enables teams to test new approaches, manage risk, and translate emerging technologies into real-world applications across different regulatory and cultural contexts.

DUBLIN CHILDREN'S HOSPITAL

Status: Built

Completion: 2025

Scale: 165,000 sqm

Location: Dublin, Ireland

Continent: Europe

Use: Healthcare

Role of the London-based team:
Architecture and urban design

Project Team:

Architect: BDP

Client: National Paediatric Hospital Development Board

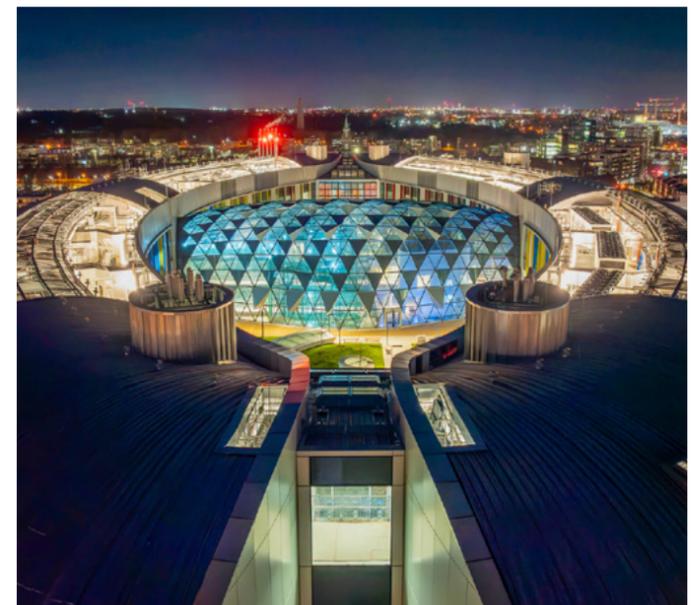
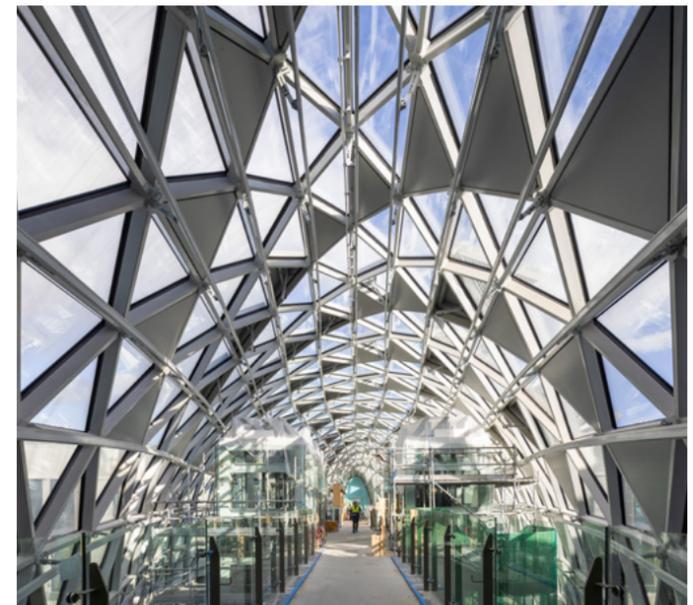
The New Children's Hospital, located at the west end of the St. James Hospital campus in Dublin, is Ireland's largest healthcare project. It will bring together the three existing children's hospitals at Crumlin, Temple Street, and Tallaght, creating a single, world-class paediatric care facility.

At the heart of the design is an oval ward pavilion, surrounded by one of Europe's largest rooftop gardens. This "floating garden" elevates the therapeutic benefits of nature, creating a welcoming and distinctive identity for the hospital. The ward pavilion's form reflects Dublin's architectural heritage, aligning with iconic landmarks like the Royal Hospital Kilmainham and Phoenix Park, while providing patients and families with sweeping views of the city's green spaces.

In addition to its thoughtful design, the hospital will feature 384 inpatient beds, 14 theatres, an emergency department, and a cutting-edge research and innovation centre. Natural ventilation in the inpatient rooms reduces energy consumption, supporting the hospital's goal of achieving an A3 Building Energy Rating and aligning with the UKGBC Advancing Net Zero Framework.

The hospital's extensive landscaping includes gardens and terraces, such as the enclosed Rainbow Garden, which offers a safe, sensory-rich space for play, learning, and respite. These outdoor areas are designed to reduce stress and enhance well-being for patients, visitors, and staff alike. Sustainability is integral to the project. The building incorporates natural ventilation, energy-efficient design, and Passivhaus-level insulation, contributing to its BREEAM Excellent certification. Prefabricated elements, such as bathroom pods and unitised facades, streamlined construction while maintaining high standards. Digital technology played a vital role in delivering this complex project. A full BIM model facilitated efficient design coordination, while tablet-based quality inspections ensured compliance with Irish Building Control regulations.

Scheduled to open in 2026, this inspirational project represents a transformative step forward for children's healthcare in Ireland. By prioritising clinical excellence, innovative design, and sustainability, the New Children's Hospital provides a space that is functional and uplifting, a place where young patients can receive the world-class care they deserve.



ROIG ARENA

- Status:** Built
- Completion:** 2025
- Scale:** 58,500 sqm
- Location:** Valencia, Spain
- Continent:** Europe
- Use:** Culture (Stadium)
- Role of the London-based team:** Architecture and urban design, Professional consulting services
- Project Team:**
- Client:** Licampa 1617
- Architects:** HOK + ERRE
- Landscape Architect:** GM Paisajistas
- Structural Engineer:** SBP Schlaich bergemann partner, GmáSP
- MEP Engineering:** JG Ingenieros, Ramboll
- Acoustic Engineering:** Vanguardia
- Interior Design:** ERRE, Nihil
- Ceramics:** Pamesa Grupo Empresarial

Roig Arena, developed by Licampa 1617 and designed by HOK and ERRE, revitalises Valencia's Quatre Carreres district. Hosting Valencia Basket Club's teams, the multipurpose venue welcomes sports, music, cultural, and corporate events. Integrated with a two-hectare public park, it creates a vibrant civic hub for year-round community engagement. HOK's London-based expertise played a significant role in the project's delivery, strengthening local capacity and advancing innovation and sustainability.

Parametric design, a methodology refined in London, was applied to optimise the arena bowl's geometry for sightlines and event modes, and to design the complex double-curved envelope using 8,600 ceramic fins. The London team developed digital models to precisely script the placement and angle of each fin, which in turn allowed structural engineers to refine the supporting steel structure. This facade also functions as a high-performance sustainability feature, offering solar shading and natural ventilation. This passive approach, combined with a roof-mounted PV array and extensive outdoor hospitality areas, highlights the project's commitment to sustainability and innovation.

"Roig Arena in Valencia exemplifies a truly integrated design partnership, and was one of the most intense and fascinating collaborative endeavours I have experienced. We, the HOK London Team specialised in complex venue design, worked closely with Valencian Local Practice ERRE, the specialist structural engineers, SBP, and a wider Design Team, to create a building that operates at an international level yet in accord with the neighbourhood, the city and the Valencian culture."

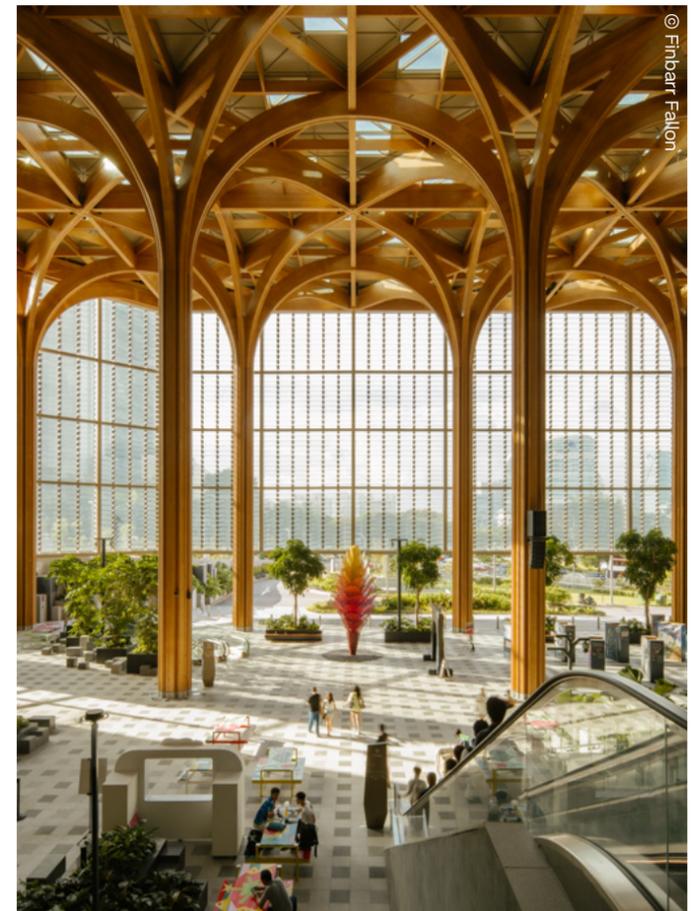
Nuno Guerreiro, Project Designer at HOK



GENEO SINGAPORE SCIENCE PARK

- Status:** Built
- Completion:** 2024
- Scale:** 26,000 sqm
- Location:** Singapore
- Continent:** Asia
- Use:** Commercial
- Role of the London-based team:** Architecture and urban design
- Project Team:**
- Client:** Capital Land
- Architects:** Serie Architects, Multiply Architects

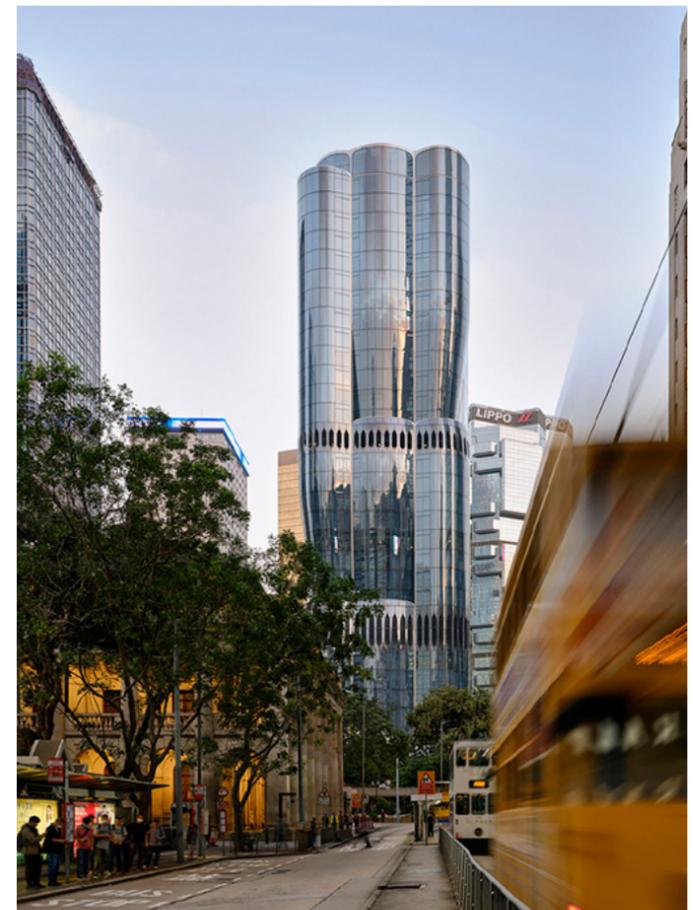
Geneo is a new life sciences and innovation cluster formed as part of Singapore Science Park's rejuvenation masterplan. The cluster incorporates a series of architectural and programmatic innovations responding to the evolving needs of contemporary science park typologies, laboratory and technology workspaces, and social environments. The architectural intent is to maximise collaborative potential, anchored by a 3,000 square metre cathedral inspired Event Plaza with a dramatic glulam arched roof structure, conceived as the key social space within the cluster.



THE HENDERSON

- Status:** Built
- Completion:** 2025
- Scale:** 42,500 sqm
- Location:** Hong Kong, China
- Continent:** Asia
- Use:** Commercial
- Role of the London-based team:** Architecture and urban design
- Project Team:**
- Client / Developer:** Henderson Land Development
- Architect:** Zaha Hadid Architects
- Local Architect & AP:** Ronald Lu & Partners (Hong Kong)
- Building Services Engineering:** WSP (Asia)
- Structural & Geotechnical Engineering:** LERA Consulting Structural Engineers (Steel), C M Wong & Associates, Eckersley O'Callaghan Asia (Footbridges & Banquet Hall)
- Facade Engineering:** Group 5F, Meinhardt Façade Technology (Hong Kong)
- Lighting Consultants:** LichtVision, Speirs + Major (Landscape & Media Façade)
- Landscape Architecture:** PWP Landscape Architecture, Earthasia
- Quantity Surveyor:** Rider Levett Bucknall
- Sustainability & Civil Engineering:** Arup
- Traffic Consultant:** MVA (Hong Kong)
- Acoustic Consultant:** Shen Milsom & Wilke
- Vibration Consultant:** C.F. Ng & Associates
- AV / IV / Specialist Media Consultant:** Ptarmigan Integration Limited

The Henderson is a 36-storey Grade A office tower in Hong Kong's Central district, replacing a car park with a highly sustainable, nature-integrated landmark. Designed using advanced digital modelling and delivered through close collaboration between teams in Hong Kong, mainland China and ZHA staff relocated internationally, the project incorporates high-performance curved glazing, hybrid ventilation and smart systems that reduce energy demand by an estimated 26 per cent. Extensive gardens, an aquaponics Sky Garden and LEED/WELL Platinum pre-certification set new environmental benchmarks for the city.



LINPING HUMANE CITY MASTERPLAN, CHINA

Status: Proposed

Completion: Masterplan completed in 2024

Scale: 3,520,000 sqm

Location: Linping, China

Continent: Asia

Use: Mixed-use masterplan

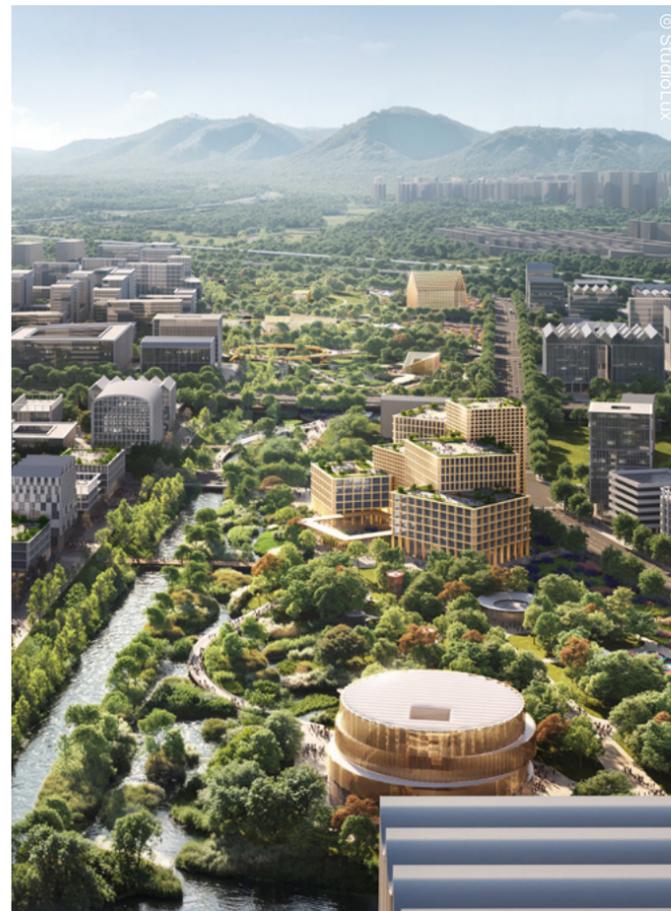
Role of the London-based team: Architecture and urban design

Project Team:

Architect: Hassell

Landscape Architect: Hassell

The proposal for Linping Humane City is about the creation and ongoing curation of a balance between people, nature and technology, where technology has a purpose underpinning and supporting natural systems while enhancing people's lives. The conceptual approach to Linping Humane City is that of a Balanced and Curated City. The balance between people, nature and technology comes through integration of natural systems, purposeful technology, low-carbon mobility and sustainable construction techniques as fundamental components. Here, a finer, human-scaled masterplan framework will facilitate a city that is more responsive to changing economic and demographic demand.



PLACEMAKING & MIXED-USE REGENERATION

Placemaking and mixed-use regeneration reflect London's long-standing expertise in delivering complex, long-term urban transformation. Globally, cities are seeking models that move beyond single-use development towards integrated neighbourhoods that combine housing, employment, culture, infrastructure and public space. The projects under this theme demonstrate how London-based teams operate across planning, design, economics and governance to deliver regeneration at multiple scales.

These case studies show London's strength in coordinating diverse stakeholders, aligning public and private interests, and embedding social, cultural and economic value into development frameworks. What London exports here is an approach to city-making shaped by negotiation, phasing and long-term stewardship, learned from one of the world's most complex urban environments. This expertise enables cities internationally to deliver growth that is resilient, inclusive and adaptable over time.

PERU RECONSTRUCTION

Status: Under construction

Completion: 2026

Location: Peru

Continent: South America

Use: Healthcare, Education and Infrastructure

Role of the London-based team: Architecture and urban design, Professional consulting services, Construction and project management, Technology, product and material knowledge

Project Team:

Governance/strategy, technical assurance, training: Arup

Project Manager: Mace

Cost Consultant: Gleeds

Following the devastating 2017 El Niño Costero, the UK and Peru Governments signed an agreement to support the repair, rebuild and enhancement of damaged infrastructure.

The UK Delivery Team (UKDT), of Arup, Mace and Gleeds, was selected in 2020 to accelerate and assure the delivery, to international standards, of 140 critical infrastructure projects across the 13 regions most vulnerable to extreme weather events. As part of the UKDT, Arup colleagues in Peru, London and offices worldwide, are providing strategic and technical advice and assurance to the National Infrastructure Authority (ANIN), for the construction of 74 schools, 18 healthcare facilities, flood defences for 17 river basins and five gullies and urban drainage in seven cities. London-based experts are leading the installation of a new integrated early warning system that will help protect new infrastructure, communities and businesses from extreme weather events.

Throughout, the UKDT has proactively transferred knowledge, tools, technology and skills to build the capacity of Peru to deliver sustainable and resilient infrastructure for generations to come. The UKDT also established a BIM-enabled structured transition to operations, with the partnership extended to the end of 2026 to support the readiness of completed projects.

More than 50,000 pupils are already learning in new sustainable and resilient schools built to a new lifecycle design model that is now being applied to the rebuild of thousands of schools. International standard healthcare is benefitting more than one million people through UKDT hospitals and healthcare centres, establishing a benchmark for speed and quality in the delivery of healthcare facilities across the country. Hundreds of thousands of residents are now protected by an integrated water management programme which introduces innovative nature-based solutions and whole water-basin approach and, when completed, will benefit 16 million people. More than 20,000 jobs have been created and 20,000 learning sessions delivered to 2,000 Peru officials, alongside detailed technical guides and an online training platform, building national capacity to deliver major infrastructure programmes.



THE WELL

Status: Built

Completion: 2024

Location: Toronto, Canada

Continent: North America

Use: Mixed-use

Role of the London-based team: Architecture and urban design

Project Team:

Client: RioCan Reit

Developer: Allied Properties

Architect: BDP

Masterplan: Hariri Pontarini Architects

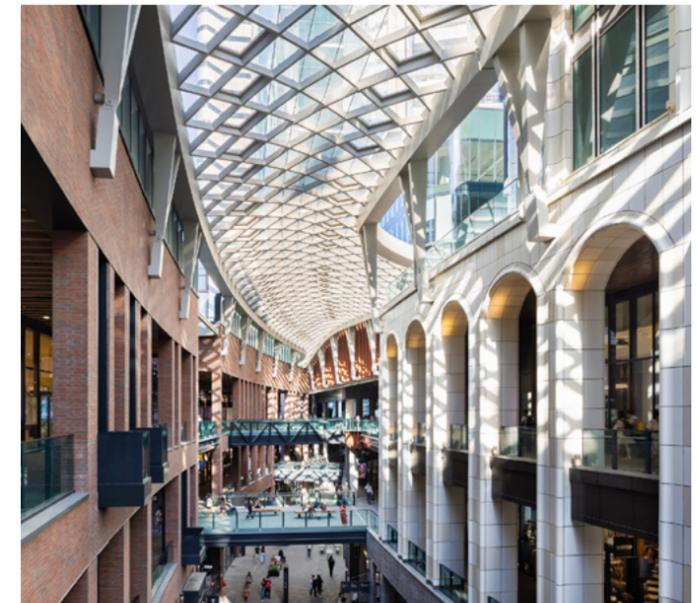
One of the largest and most exciting mixed-use redevelopments in North America, The Well has transformed 7.8 acres into a sustainable, vehicle-free neighbourhood with seven buildings mixing offices and residences with retail, galleries, bars and restaurants.

The Well is a vibrant new community in the heart of Toronto, designed to connect people with the city's dynamic urban life. This unique neighbourhood caters to all ages, offering pedestrian-friendly walkways, shops, offices, and residences that seamlessly blend together to enhance everyday living.

It features seven towers linked by a central retail spine. This spine, forming the podium's first three levels, supports up to 46-storey residential and office towers. The podium's central row is covered by an innovative glazed canopy, open on all sides for natural ventilation and an 'open to the fresh air', atmosphere. It is now seeing more than 85,000 urbanites flow through the development every day to shop, work, eat and play, becoming a place reimagined for exploration, culinary adventures and new experiences.

The new retail elements of the development, designed by BDP, create a unique environment in North America, drawing inspiration from urban models more commonly seen in Europe. The architectural character is strongly influenced by the neighbouring King Street West and Wellington West area. The design pays homage to the historical significance of its location, weaving elements of Toronto's industrial and publishing past into its modern architecture.

The use of wood, brick, and terracotta-coloured steel throughout the development reflects the industrial heritage of King West, creating a design language that bridges the past and future. This integration of historic references into a forward-looking urban space exemplifies a thoughtful blend of tradition and modernity, honouring the area's rich history while providing a contemporary setting for retail and social activities.



BAHRAIN MARINA

Status: Under construction
Completion: 2026
Scale: 300,000 sqm
Location: Manama, Kingdom of Bahrain
Continent: Middle East
Use: Mixed-use masterplan
Role of the London-based team: Architecture and urban design

Project Team:
Architect: Benoy

Bahrain Marina is a 250,000-square-metre urban resort set along Manama's eastern shoreline. The development will offer freehold luxury residences, a five-star hotel, a world-class yacht marina, a premium marine club, generous green spaces, and a lively retail and dining promenade. Blending waterfront leisure, refined living, and commercial energy, it aims to redefine contemporary coastal living in the region and establish a new benchmark for design-led waterfront destinations. Phase one of the scheme is due to complete in 2026.



KARLATORNET

Status: Built
Completion: 2024
Scale: 270,000 sqm
Location: Gothenburg, Sweden
Continent: Europe
Use: Mixed-use
Role of the London-based team: Architecture and urban design

Project Team:
Architect: Skidmore, Owings & Merrill (SOM)
Architect and Structural Engineers: Semrén & Månsson
Architect of Record: Kub Arkitekter
Interior Architect / Apartment Planning: Andreas Martin-Löf Arkitekter
Interior Architect / Apartment Planning: Entasis Arkitekter
Co-masterplanner: Vbk Konsulterande Ingenjörer Ab
Structural and Seismic Engineers: Bengt Dahlgren
MEP/Fire Protection Engineers: BRAM Ab
Project Management: BMT
Wind Tunnel Testing/Wind Wake: Peutz Group

Karlatornet, conceived to celebrate Gothenburg's 400th anniversary, is Scandinavia's tallest mixed-use tower and a catalyst for revitalising the Lindholmen riverside. Sustainable and community-focused, it introduces a bold vertical form that contrasts with the city's low-rise development. The building includes 611 homes of varied sizes, shared amenities, and vibrant public space. It also includes a hotel, restaurant, workspaces, and an observation deck with panoramic city views—creating a landmark destination and energising the district with new activity and culture.



MAKING IMPACT, WILTON PARK, DUBLIN

Status: Ongoing
Completion: 2027
Location: Dublin, Ireland
Continent: Europe
Use: Research piece
Role of the London-based team: Professional consulting services, research services including tools, materials, and methodologies that drive better practice, insight, or impact
Project Team:
Project Manager: Occasio Insights
Consultants: PRD, Gehl

IPUT Real Estate's Wilton Park is a landmark Dublin mixed-use development built around a beautifully restored historic park. To better quantify the impact of their proactive investment in placemaking and the public realm at this scheme, IPUT initiated the 5-year *Making Impact* research project in 2023. This comprehensive study, led by consultants PRD and Occasio alongside international design firm Gehl, measures 73 key indicators across social, cultural, economic, and environmental pillars. The resulting data will deliver valuable, evidence-based insights for informing placemaking strategies in Ireland and globally.



MILANO CORTINA OLYMPIC VILLAGE

Status: Built
Completion: 2025
Scale: 53,380 sqm
Location: Milan, Italy
Continent: Europe
Use: Mixed-use
Role of the London-based team: Architecture and urban design

Project Team:
Client: Coima Sgr - Fondo Porta Romana
Lead development manager: Coima Rem
Co-development manager: Covivio
Architectural design: Skidmore, Owings & Merrill (SOM)
Executive and architectural design: D&D
Structural design and construction management: Bcube
Contractor: Rti - Cev (principal), Grassi e Crespi (principal), Milani (principal)
Rti technical director: Claudio Foscaro (Cev)
Olympias director: Claudio Foscaro
Site technical director: Andrea Quaglia (Cev)

The Milano Cortina Olympic Village leverages the 2026 Winter Games to build a sustainable, intergenerational community in Milan's Porta Romana district. A key part of the Railway Yard Masterplan, it sets a model for Olympic sites to serve long-term social goals. Designed to integrate into the city, it includes public green spaces, restored historic structures, and new residences for athletes. After the Games, housing becomes student and affordable units, and the village plaza evolves into a vibrant neighbourhood hub.



SEA BREEZE MASTERPLAN

Status: Under construction

Completion: 2033

Scale: 18,000,000 sqm

Location: Baku, Azerbaijan

Continent: Asia

Use: Mixed-use masterplan

Role of the London-based team:

Architecture and urban design, Professional consulting services, Technology, product and material knowledge

Project Team:

Client: Nardaran Invest LLC

Architect: Scott Brownrigg

Positioning Azerbaijan as a world-class destination, Sea Breeze transforms 18km of Caspian coastline into a vibrant new city. Designed by Scott Brownrigg's London team, the project fosters innovation, integrating smart technologies, renewable energy, and inclusive design. Embracing ecology, cultural heritage, and circular economy principles, it delivers economic opportunity, local employment, community resilience, and environmental stewardship. This visionary masterplan sets a benchmark for tourism-led growth, shaping a dynamic, connected, and sustainable future for Azerbaijan.



SHUSHA MASTERPLAN – A CITY REBORN

Status: Under construction

Completion: Masterplan completed in 2022

Scale: 5,060,000 sqm

Location: Shusha, Azerbaijan

Continent: Asia

Use: Mixed-use masterplan

Role of the London-based team:

Architecture and urban design

Project Team:

Architect: Chapman Taylor

A masterplan has been developed for the historic city of Shusha in Azerbaijan's Karabakh region. Designed for 25,000 residents, it respects the city's original street pattern while introducing 12 districts with integrated public spaces, sustainable mobility, and modern infrastructure. Led by Chapman Taylor's London studio, the project creates a heritage-led, future-focused cultural capital.



TREE OF HOPE BEIRUT BLAST MEMORIAL

Status: Proposed

Completion: Design completed in 2020

Scale: 60 sqm

Location: Beirut, Lebanon

Continent: Middle East

Use: Culture (Installation)

Role of the London-based team:

Architecture and urban design

Project Team:

Architect: Studio Lux

Structural Engineer: Evolve Consulting Engineers

Lighting consultant: Speirs + Major Light Architecture

Tree of Hope transforms the Beirut blast site into a contemplative seed for future masterplanning. Formed from upcycled metal salvaged from the damaged port, it turns material ruin into a symbol of hope from tragedy. Its perforated rings drape shifting light, forming a canopy-like civic space for remembrance and gathering. The internal light-filled void honours those lost while anchoring a wider landscape vision that reconnects community, memory and future regeneration.



© Studio Lux

SUSTAINABLE, NATURE-LED DESIGN

This theme focuses on how low-carbon design, urban greening and biodiversity are being used to improve building and district performance. As cities respond to climate conditions and long-term resilience objectives, environmental strategies are increasingly integrated into how buildings and places are planned, designed and operated. The projects grouped here demonstrate how landscape, ecology and environmental systems are embedded early in the design process and inform building performance.

London's expertise in this area has been shaped by delivering projects in a dense urban context with ambitious climate targets and evolving planning frameworks. The case studies illustrate skills in low-carbon masterplanning, passive environmental design, green and blue infrastructure, biodiversity net gain and the integration of nature-based solutions within commercially viable schemes. What London exports through this work is a practical, performance-led approach to sustainability, translating environmental objectives into design and delivery strategies that improve operational efficiency, reduce carbon impact and remain adaptable across different climates, regulatory environments and delivery models.

BAGHDAD SUSTAINABLE FOREST

Status: Proposed

Completion: 2030

Scale: 1,500,000 sqm

Location: Baghdad, Iraq

Continent: Asia

Use: Mixed-use masterplan

Role of the London-based team:
Architecture and urban design

Project Team:

Client: Iraq Government

Developer: Emkanat

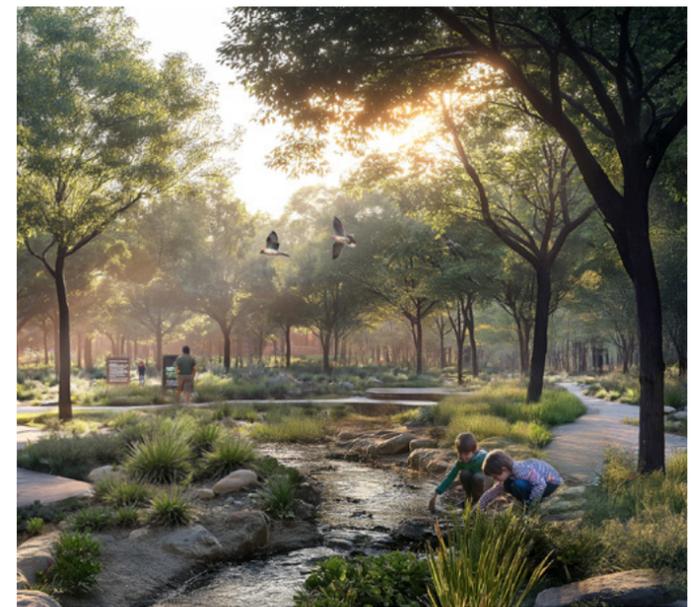
Architect: Gensler

Baghdad Sustainable Forests is the largest ecological development in Iraq, designed to restore the land and renew the city's identity. Extending over 10 million square meters, this long-term investment transforms the former Al-Rasheed military campsite into a living symbol of renewal, with thriving mixed-use villages and urban clusters set within an extensive forest.

A series of thematic forests defines the site, each offering tailored spaces for creativity, well-being, play, and community. One million trees on site capture 22,000 metric tons of CO₂ annually, interspersed between tranquil trails and vibrant civic plazas.

The masterplan introduces distinct gateways and lifestyle villages with over 1,500,000 square meters of retail, commercial, and amenity infrastructure. These walkable, mixed-use hubs are designed to support a growing urban population and foster social connections.

Rooted in the land's history and ecological potential, the development positions the city for its next chapter — attracting investment, fostering inclusive growth, rebuilding community ties, and celebrating Baghdad's rich heritage as a centre of creativity and exchange.



HAMDAN BIN RASHID CANCER HOSPITAL

Status: Under construction

Completion: 2026

Scale: 55,000 sqm

Location: Dubai, United Arab Emirates

Continent: Middle East

Use: Healthcare

Role of the London-based team: Architecture and urban design, Professional consulting services, Construction and project management, Technology, product and material knowledge

Project Team:

Client: The Al Jalila Foundation

Architect, Interior Architect, Planning, Project Manager, MEP and Structural Engineering: Stantec

The Hamdan Bin Rashid Cancer Hospital will be Dubai's first integrated comprehensive cancer hospital, combining primary care, diagnosis, and treatment to offer detection and intervention at earlier stages of the patient journey.

The expansive hospital will house 50 clinics, 30 clinical trial areas, 60 infusion rooms, 10 urgent care rooms, five radiotherapy rooms, and 116 inpatient beds to meet current and future demand. Featuring 19 gardens, an abundance of green space will create a healing setting for patients and their families.

The need for a culturally appropriate design that reflected Dubai Health's new brand identity was one of the main design challenges. Stantec's London-based design team led the project, drawing inspiration from the Ghaf tree—the United Arab Emirates' national tree and a symbol of life, peace, and tolerance. The tree's geometry is reflected in the hospital's composition—lower and raised blocks, gently twisting, with a large court as a point of focus and gravity.

The ground floor is designed to meet the cultural need for privacy and intimacy while providing a welcoming and anxiety-reducing environment for patients. The first thing they see is the Serenity Court—a multi-storey open-air courtyard that brings daylight and vegetation deep into the core of the building and furnishes the various departmental reception and waiting areas with elevated internal gardens of their own.

Stantec also crafted a solution that embraces the natural environment as a metaphor for health, resilience, and sustainability. The gentle twist reveals a series of roof terraces with 360-degree views, providing chemotherapy patients with direct access to beautifully curated, healing gardens. The design features a high-performance building envelope, low-carbon design strategies, and rooftop photovoltaics. The deep façade will maximise views while passively managing solar gain and glare. The hospital will be designed to LEED Gold and WELL Building standards.



OSUS GREEN TOWER

Status: Under construction

Completion: 2026

Scale: 34,610 sqm

Location: Riyadh, Saudi Arabia

Continent: Middle East

Use: Commercial

Role of the London-based team: Architecture and urban design, Technology, product and material knowledge

Project Team:

Architect: Benoy

Client: OSUS



Occupying a highly prominent site on King Salman Road, Green Tower commands sweeping views across the evolving cityscape of Riyadh. Benoy was commissioned to create a design that would be instantly recognisable and architecturally bold, while remaining deeply rooted in local traditions and cultural context. Developed in close collaboration with our client, OSUS, the design is inspired by a vision of Riyadh as a garden city. This concept is expressed through a distinctive "garden box" element that spirals upward through the tower, visually and physically connecting the building to its urban surroundings. As occupants move through the tower, panoramic views unfold and transform, creating a dynamic and immersive relationship with the city and the landscape beyond. Guided by sustainable design principles, the scheme prioritises wellbeing, innovation and environmental performance, delivering a forward-looking workplace at the very heart of the city. Benoy's designs were awarded "Best New Concept" at the Design Middle East Awards 2024. The scheme is due to open in 2026.

"OSUS Green Tower sets a new benchmark for workplace design in Riyadh. Our vision was to draw nature into the heart of the building, placing wellbeing, sustainability and innovation at the core of the design. By embracing cutting-edge design technologies, we have been able to push the boundaries of both creativity and functionality. This is not just a building for today, but a workplace designed with the future firmly in mind."

Mike Wilson-MacCormack, Executive Director, Benoy

AMERICAN REPERTORY THEATER AT HARVARD UNIVERSITY

Status: Under Construction

Completion: 2026

Scale: 7,432 sqm

Location: Boston, USA

Continent: North America

Use: Culture & Entertainment

Role of the London-based team: Architecture and urban design

Project Team:

Client: American Repertory Theater and Harvard University

Architects: Haworth Tompkins and Architectural Resources Cambridge (ARC)

Architect of Record: Architectural Resources Cambridge (ARC)

Main Contractor: Shawmut Design and Construction

Acoustics: Charcoal Blue

Planning: Epsilon

Structural Engineers: LeMessurier

Project Manager: Harvard Capital Projects

Sustainability Consultant: Thornton Tomasetti

The David E. and Stacey L. Goel Center for Creativity & Performance, the new home of Harvard's A.R.T., is a sustainable, mass timber arts complex designed to foster creativity, collaboration, and community. It features two adaptable theatres, along with rehearsal studios, teaching spaces, technical workshops, and public areas including a lobby, cafe, and outdoor performance yard. Powered by Harvard's low-carbon energy systems, the centre prioritises regenerative design, wellbeing, and innovation, setting a new standard for sustainable performing arts facilities.



ANCORA 40

Status: Built

Completion: 2021

Scale: 8,000 sqm

Location: Madrid, Spain

Continent: Europe

Use: Commercial

Role of the London-based team: Architecture and urban design

Project Team:

Client: UK & European/Blue Coast Capital

Client: BWRE

Architect: Buckley Gray Yeoman

Local Architect, Quantity Surveyor, Structural Engineer, Services Engineer: Deerns Spain

Landscape Architect: Juan Casla Paisajismo

Ancora 40 is a creative campus in central Madrid, redeveloped from two 1955 buildings into 8,000 sqm of flexible workspace. The design integrates terraces, a central courtyard, and shared amenities including a cafe and event space. Featuring hybrid steel and timber construction, it significantly reduces embodied carbon and was the first of its kind in the Spanish market. Sustainability credentials include pre-certification for LEED Gold, alongside strategies for energy efficiency and low-carbon materials, setting a benchmark for innovative, sustainable urban redevelopment.



DISTRICT ADMINISTRATION EXTENSION — HYBRID TIMBER

Status: Built

Completion: 2025

Scale: 3,500 sqm

Location: Eutin, Germany

Continent: Europe

Use: Commercial

Role of the London-based team: Architecture and urban design

Project Team:

Client: Kreis Ostholstein

Architect: blng studio

Landscape Architect: WES

Structural Engineer: Drewes + Speth

A competition-winning civic workplace that extends a listed ensemble with clarity and care. The CLT wood-hybrid structure and prefabricated elements demonstrate sustainable, low-carbon construction and circular design. Daylight, clear circulation, and a timber-lined stair foster wellbeing, transparency, and connection—combining environmental performance with human-centred design and long-term adaptability.



HUFELANDMARK

Status: Proposed

Completion: Proposal completed in 2023

Scale: 27,170 sqm

Location: Munich, Germany

Continent: Europe

Use: Mixed-use

Role of the London-based team: Architecture and urban design, Technology, product and material knowledge

Project Team:

Client: HUF4, GmbH & Co. Kg

Architects: Morris+Company (London and Copenhagen) with Kirchberger & Wiegner Rohde (Berlin)

Landscape Architect: Bauchplan (Munich)

Structural Engineering & Fire: Bollinger + Grohmann (Berlin)

MEP Engineer: HL – Technik Engineering (Munich)

A new landmark tower — part of the wider BMW masterplan in Munich — comprising retail, 328-key hotel, 10,000 sqm office, plus sky-bar framing panoramic views. Designed as a true pan-European collaboration between Morris+Company's London and Copenhagen offices, together with Kirchberger & Wiegner Rohde in Berlin, for Hammer AG, Munich, the project was initiated during the height of the Corona crisis, with the backdrop of Britain's impending exit from Europe. The scheme creates simple, flexible, future-proofed floorplans and biodiverse terraces externally.



INMADRID

Status: Under construction

Completion: 2026

Scale: 13,267 sqm

Location: Madrid, Spain

Continent: Europe

Use: Commercial

Role of the London-based team:

Architecture and urban design

Project Team:

Client: Revcap

Client: BWRE

Architect: Buckley Gray Yeoman

Local Architect: Alonso Arquitectos

Quantity Surveyor: Mace

Structural Engineer: Valladares

Services Engineer: Deerns Spain

Landscape Architect:

Juan Casla Paisajismo

InMadrid is a net zero carbon office development located in Madrid's Salamanca district which provides 13,267 square meters of office space. Construction began in February 2024 with completion expected in early 2026. The project features sustainable elements including geothermal heating, photovoltaic installations and 95 EV charging spaces. It targets LEED Platinum, WELL, and WiredScore certifications. The development offers over 4,000 square meters of outdoor spaces with courtyards and terraces, plus inclusive amenities like gender-neutral facilities, prayer rooms, and accessibility features for disabled occupants.



SENTOSA SENSORYSCAPE

Status: Built

Completion: 2024

Scale: 13,089 sqm

Location: Singapore

Continent: Asia

Use: Public realm

Role of the London-based team:

Architecture and urban design

Project Team:

Client:

Sentosa Development Corporation

Architects: Serie Architects

Architects: Multiply Architects

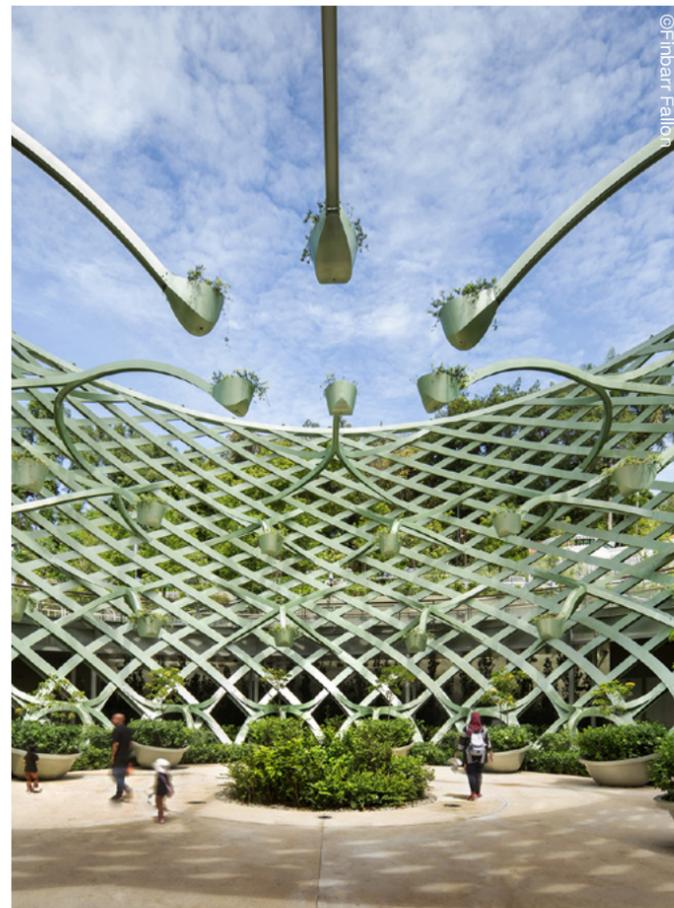
Structural and MEP Engineering:

AECOM

Structural Engineering (Concept and

schematic design): AKT II

The immersive 350 metre walk through Singapore's Sentosa Island offers a multi-sensory experience through a series of six unique gardens. Three woven vessel structures frame gardens designed to activate the senses of touch, smell and sound. At night Sensoryscape is transformed by digital light art and augmented reality installations.



SILK TOWERS

Status: Under construction

Completion: 2029

Scale: 20,000 sqm

Location: Batumi, Georgia

Continent: Asia

Use: Mixed-use

Role of the London-based team:

Professional consulting services

Project Team:

Client: Silk Development

Architect: Kengo Kuma and Associates

Bioclimatic, Envelope, Infrastructure, Structural Engineering: AKT II

Executive structures: Meinhardt

Executive architect: +A

Cost consultant: Silk Road Group

Fire consultant: FLS

Acoustic consultant, MEP / sustainability: Dinamik Proje Muhendislik

Landscape: MASU Planners

A multi-tower development in Batumi, Georgia, combining high and low-rise buildings around a revitalised public realm. Three towers with podiums provide residential, commercial, and recreational spaces along the waterfront.



SKYLIGHT

Status: Built

Completion: 2023

Scale: 8,000 sqm

Location: Madrid, Spain

Continent: Europe

Use: Commercial

Role of the London-based team:

Architecture and urban design

Project Team:

Client: PineBridge Benson Elliot

Client: BWRE

Architect: Buckley Gray Yeoman

Local Architect: Manuel Domenech

Quantity Surveyor: Mace

Structural Engineer: Valladares

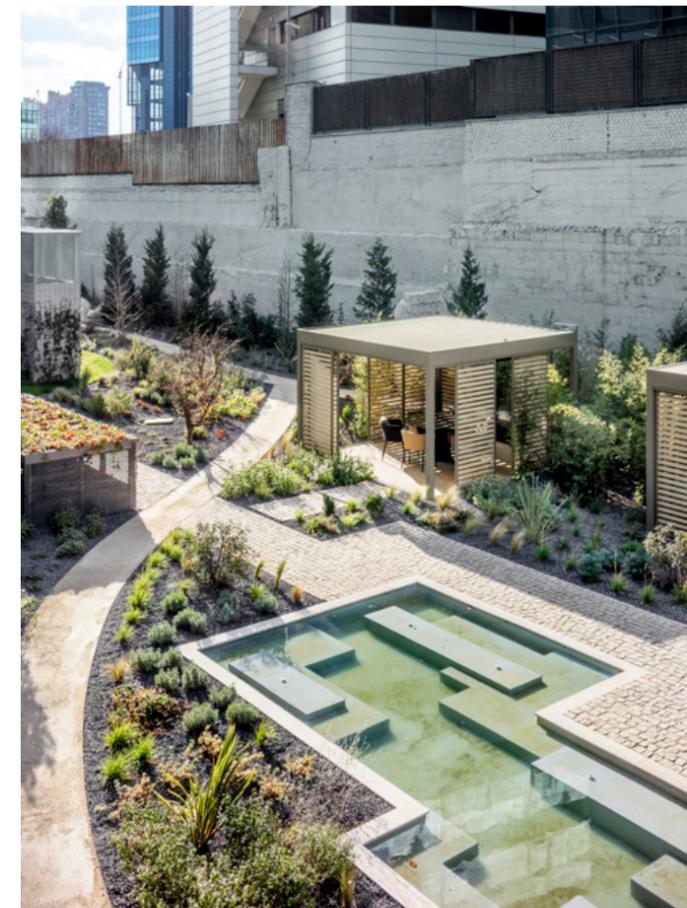
Services Engineer: Deerns Spain

Landscape Architect:

Juan Casla Paisajismo

Contractor: Ferrovial

SkyLight is a Grade A office development in Madrid, offering 27,000 square metres of flexible workspace across seven floors with column-free floorplates and biophilic design. Features include landscaped gardens, roof terraces, smart building technology, and premium amenities such as a cafe, gym, and rooftop padel court. Sustainability credentials include LEED Platinum, WiredScore Platinum, WELL Platinum (pending), Energy Class A, and Net Zero Carbon readiness, with significant reductions in energy and water consumption and high recycled material content.



SUMMIT & RIDGE, SANCTUARY

Status: Planning granted
Completion: 2027
Scale: 47,875 sqm
Location: Sydney, Australia
Continent: Australasia
Use: Residential
Role of the London-based team: Architecture and urban design
Project Team:
Developer: Sekisui House
Architect: Turner Studio

Having developed the masterplan for the precinct, Turner Studio prepared concurrent planning applications for four stages. The London studio took carriage of one of these. The twin-tower/podium composition is developed from a series of interlocking curved forms that rotate and step to present slender edges to each view. The scale is considered viewed from both close proximity and also at an urban scale.



UK PAVILION AT WORLD EXPO OSAKA

Status: Built
Completion: 2025
Scale: 1,760 sqm
Location: Osaka, Japan
Continent: Asia
Use: Culture (Installation)
Role of the London-based team: Architecture and urban design, Professional consulting services, Construction and project management
Project Team:
Architects: WOO architects, Tripod Studios
Engineers: Momentum Engineering, Max Fordham, Structured Environment
Principal Contractor: ES Global

The UK Pavilion at Expo 2025 Osaka is a striking, sustainable structure designed by WOO architects and delivered by ES Global using a 10 metre by 10 metre modular system. Located on the island of Yumeshima, the pavilion embodies the theme "Come Build the Future", celebrating British ingenuity from the Industrial Revolution to the digital age. It was built using ES Global's Global Modular System and lightweight foundation technology.



WELLINGTON COLLEGE INTERNATIONAL SCHOOL, BANGKOK

Status: Under construction
Completion: 2025
Scale: 81,000 sqm
Location: Bangkok, Thailand
Continent: Asia
Use: Education
Role of the London-based team: Architecture and urban design
Project Team:
Architect: Hawkins\Brown
Client: Wellington College

Hawkins\Brown has partnered with Wellington College over the past four years to support its long-term growth. In 2021, the team was commissioned to review the campus and develop a masterplan to accommodate increasing pupil numbers, particularly from the local Thai community. This led to the design of three new buildings, the Crowthorne senior school building, an early years building and a super-sized sports hall. These contemporary buildings reference traditional Thai architecture with its rich language rooted in environmental function—overhanging roofs and verandas for shading and rain protection, open spaces to promote cross ventilation and covered external play areas.



WILMAR HEADQUARTERS SINGAPORE

Status: Built
Completion: 2021
Scale: 19,600 sqm
Location: Singapore
Continent: Asia
Use: Commercial
Role of the London-based team: Architecture and urban design
Project Team:
Client: Perennial Singapore
Architect: Eric Parry Architects
Local Executive Architect: RSP
Landscape Architect: ICN Design
Structural Engineer: Prime Structures
Mechanical Engineer: Squire Mech
Facade Consultant: Inhabit Group
Lighting Design: Nipek
Contractor: Boustead Projects

The new headquarter combines signature architecture with high quality public realm and is set within the tropical garden of Zaha Hadid Architects' One North masterplan. Eric Parry Architects led the design with Singapore based RSP as executive architects. The highly sustainable building is lifted to create a continuous landscape; its organic form and tiered landscaped terraces provide garden aspects to each office level.



TRANSPORT-ORIENTED DESIGN

This theme focuses on how transport infrastructure supports connectivity, accessibility and a city's ability to remain well connected and accessible as it grows. London's public transport network, including the Underground and the Elizabeth line, is widely referenced internationally for the way it supports dense, mixed-use city-making and enables growth to be organised around reliable, high-capacity transit. Recent investments, particularly the Elizabeth line, demonstrate how transport can reinforce spatial coherence across a metropolitan region, improving east-west connectivity, reducing journey times and expanding access to employment, housing and services.

The projects grouped here demonstrate how London-based teams apply this experience internationally, working across transport planning, urban design and infrastructure delivery to help cities organise development around transit corridors and nodes. They illustrate skills in integrating new infrastructure into existing urban fabric, coordinating multiple agencies and funding models, and planning for long-term adaptability as cities grow. What London exports through this work is a connectivity-led approach to city-making: using public transport infrastructure not only to move people efficiently, but to structure development, unlock regeneration, and create well-connected, resilient urban systems that function at both local and metropolitan scales.

SENATE DEPED MASTERPLAN

Status: Proposed

Completion: Masterplan completed in 2025

Scale: 100,000 sqm

Location: Manila, Philippines

Continent: Asia

Use: Mixed-use masterplan

Role of the London-based team:
Architecture and urban design

Project Team:

Project lead: Crossrail International and Transport for London

Architect: Hawkins\Brown

Client: The Foreign and Commonwealth Development Office

Hawkins\Brown was commissioned by the Foreign and Commonwealth Development Office (FCDO) to bring their expertise of master-planning around rail infrastructure to the Philippines. Transit oriented developments are being promoted by the FCDO's Green Cities project to reduce carbon emissions and make best use of land in urban locations around the developing world. Currently, Manila is choked with polluting private vehicle traffic, with few significant public open green spaces, and an urban environment prone to flooding and earthquakes. The project seizes the opportunity to demonstrate how to shift current local development models on a site which will be one of the most transit-connected parts of central Manila. The city also has few examples of historic buildings that have been repurposed for public use. The proposals include the repurposing of designated *Important Cultural Properties* originally designed by National Artist Leandro Loxin. Adaptations to their structures will maximise their functionality and facilitate greater placemaking value. It will show that cultural and public facing elements, though not directly profit-driven, add financial and social value to the whole development and surrounding areas. It will reserve the majority of the site as publicly accessible space, owned and managed by a public body for the benefit of the widest group of people across socio-economic boundaries. It will be designed to minimise "whole place" carbon emissions in its urban form and architectural specification, as well as create an environmentally comfortable setting that builds resilience against climate events.

This project is a vivid demonstration of how London's urban design thinking can be meaningfully transferred to global contexts. Under the management of Crossrail International we've designed a comprehensive development on a super-connected if not the most connected future site in Manila. In a traffic-clogged city with a dearth of public open space and lack of urban greening, our masterplan brings the best qualities of London city-making - richness, generosity, inclusivity and climate resilience, all within a commercially viable proposition that makes best use of publicly-owned land.

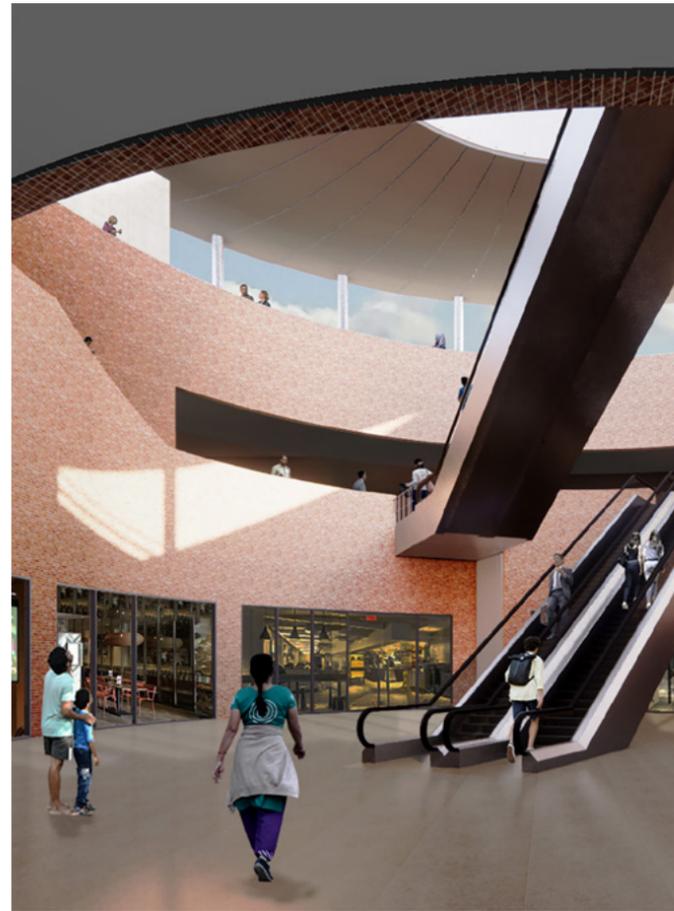
Darryl Chen, Partner & Urban Design Lead, Hawkins\Brown.



DHAKA METRO

Status: Under construction
Completion: 2030
Location: Dhaka, Bangladesh
Continent: Asia
Use: Transport & Infrastructure
Role of the London-based team: Architecture and urban design
Project Team:
Architect: BDP
Engineers: Nippon Koei

BDP are designing nine underground stations for Dhaka Metro Line 5, which will cross the heart of the city from west to east. In collaboration with Nippon Koei, it is their first project in Bangladesh and draws on their experience of designing significant transport projects such as Glasgow Queen Street Station and Whitechapel Station on the Elizabeth line in London.



EGLINTON CROSSTOWN WEST EXTENSION

Status: Proposed
Completion: 2031
Location: Toronto, Canada
Continent: North America
Use: Transport & Infrastructure
Role of the London-based team: Architecture and urban design
Project Team:
Lead designer: WSP Canada
Architect: Hawkins\Brown
JVC: Acciona, Amico, Alberici

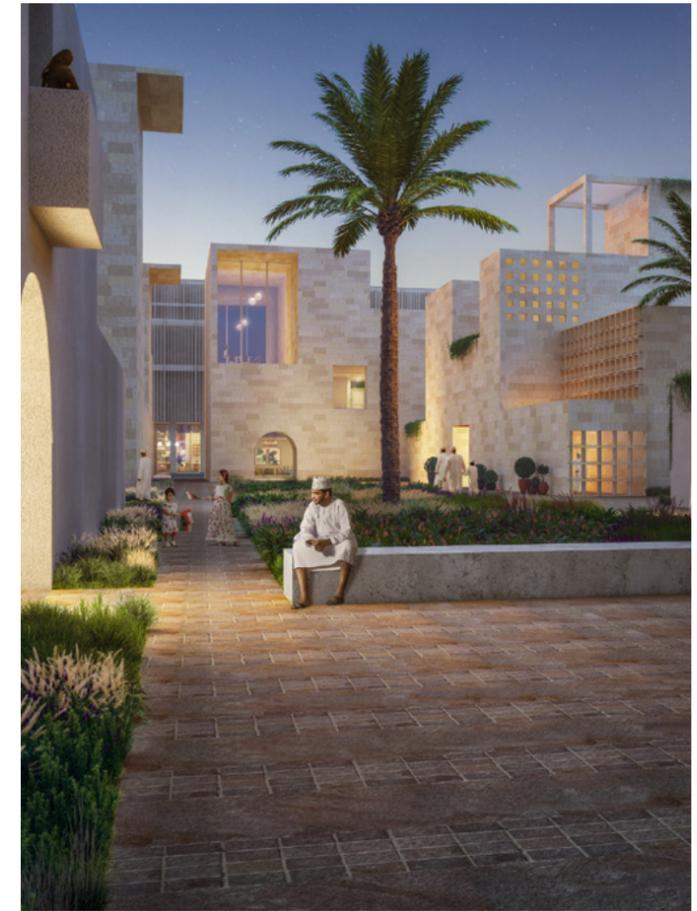
As part of the Trillium Rail Partnership, Hawkins\Brown is designing and delivering the Eglinton Crosstown West Extension in Toronto, Canada. The project will extend the metro network 9.2km west with seven new stations. 37,500 more people will be within walking distance of the new stations, 4,800 of them low-income residents. The extension will mean up to 6.5 million fewer car trips on the road (combined with the Eglinton Crosstown LRT) and a reduction in greenhouse gas emissions of 5,800 tonnes. Hawkins\Brown bring their award-winning Crossrail experience to the design and delivery of Jane, an elevated rail and Martin, an underground station, and are leading the line-wide common design.



NEW CITY IN SOHAR MASTERPLAN

Status: Proposed
Completion: Masterplan completed in 2025
Scale: 7,120,000 sqm
Location: Sohar, Oman
Continent: Middle East
Use: Mixed-use masterplan
Role of the London-based team: Architecture and urban design (e.g. masterplanning, interiors, landscape)
Project Team:
Client: Ministry of Housing and Urban Planning, Oman
Architect, Landscape Architect, Masterplanner: Hassell

The New City in Sohar masterplan, covering over 700 hectares, is designed to embrace the region's ongoing transformation and newly emerging GCC rail infrastructure at its core. Centred around two large district parks that offer expansive view corridors to the existing Sultan Qaboos Grand Mosque, the new city will provide 20,000 new homes and over 200 hectares of green space. In addition, there will be 520,000 sqm of office space, schools, mosques, hospitals, and numerous arts and education infrastructure.



ENDNOTES

1 [NLA \(2020\). London Design Capital: Recovery and London's role as a global design hub](#)

2 [NLA \(2025\). The Built Environment Sector](#)

3 [NLA \(2025\). The Built Environment Sector](#)

4 [Building Design \(2020\). WA100 2020: The big list](#)

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7 [Department for Business and Trade \(2025\). Official statistics: UK trade in numbers \(web version\). Top 5 UK services exports in the 4 quarters to the end of September 2025](#)

8 [GLA Economics Presentation – Built Environment for the Growth Mission Board](#)

9 [GLA Economics Presentation – Built Environment for the Growth Mission Board](#)

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11 [NLA \(2020\). London Design Capital: Recovery and London's role as a global design hub](#)

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13 [City of London \(2024\). Catalysing UK economic growth through financial services foreign direct investment: a call to action](#)

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15 [NLA \(2020\). London Design Capital: Recovery and London's role as a global design hub](#)

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17 [NLA \(2020\). London Design Capital: Recovery and London's role as a global design hub](#)

18 [NLA \(2020\). London Design Capital: Recovery and London's role as a global design hub](#)

19 [UCL \(2025\). Student body](#)

20 [NLA \(2020\). London Design Capital: Recovery and London's role as a global design hub](#)

21 [NLA \(2020\). London Design Capital: Recovery and London's role as a global design hub](#)

22 [David Morris \(2025\). Skilled Worker Visa Minimum Salary 2025](#)

23 [Architecture Social \(2025\). Salary information for Architecture in November, 2025](#)

24 [UK Parliament \(2026\). Churchill and the Commons Chamber](#)

25 [NLA \(2025\). The Built Environment Sector](#)

26 As approaches to collecting economic statistics differ between the UK and the United States precise like-for-like measures were not available, therefore the data in this report is built on a best-possible comparison and supplemented by evidence gathered through interviews with the NLA members.

27 UK sector size is measured using GVA and US sector size using GDP. While these measures are not directly comparable, they both serve as reasonable proxies for relative economic scale in each city.

28 New York City built environment GDP estimates should be treated as conservative. In the absence of official city-level GDP data at the required level of industry detail, estimates are derived using a top-down method that applies national GDP-per-worker ratios to New York City employment by detailed NAICS subsector. While consistent in principle with approaches used by the US Bureau of Economic Analysis, this method assumes national-average productivity and relies on headcount employment rather than earnings. As a result, it is likely to understate GDP in high-wage, knowledge-intensive subsectors such as architecture and engineering. The estimates are therefore indicative and intended to support high-level comparison rather than precise measurement.

29 In London, real estate data is reported under SIC 68 ("Real Estate Activities"), which excludes imputed rent. In the US, the equivalent category (NAICS 531, "Real Estate") includes rent and imputed rent, and these cannot be separated in the published data. To ensure a like-for-like comparison, we therefore add imputed rent to London's real estate total when comparing London with New York.

30 Internal analysis carried out by GLA Economics based on data derived from HMRC and the Inter-Departmental Business Register from the ONS.

ACKNOWLEDGEMENTS

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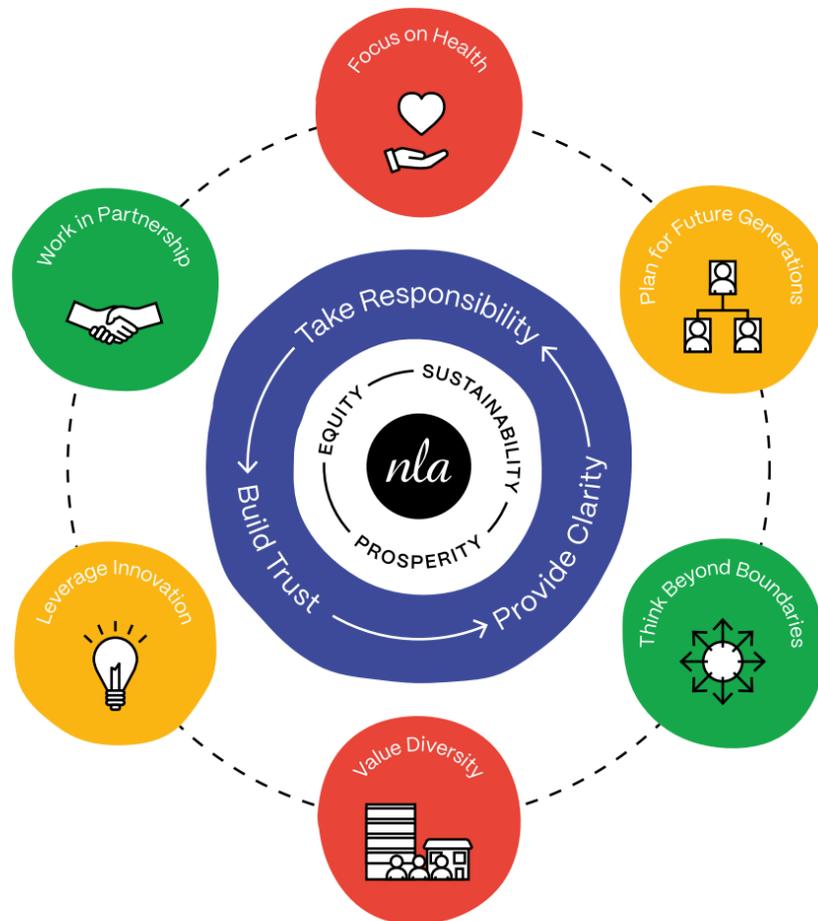
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