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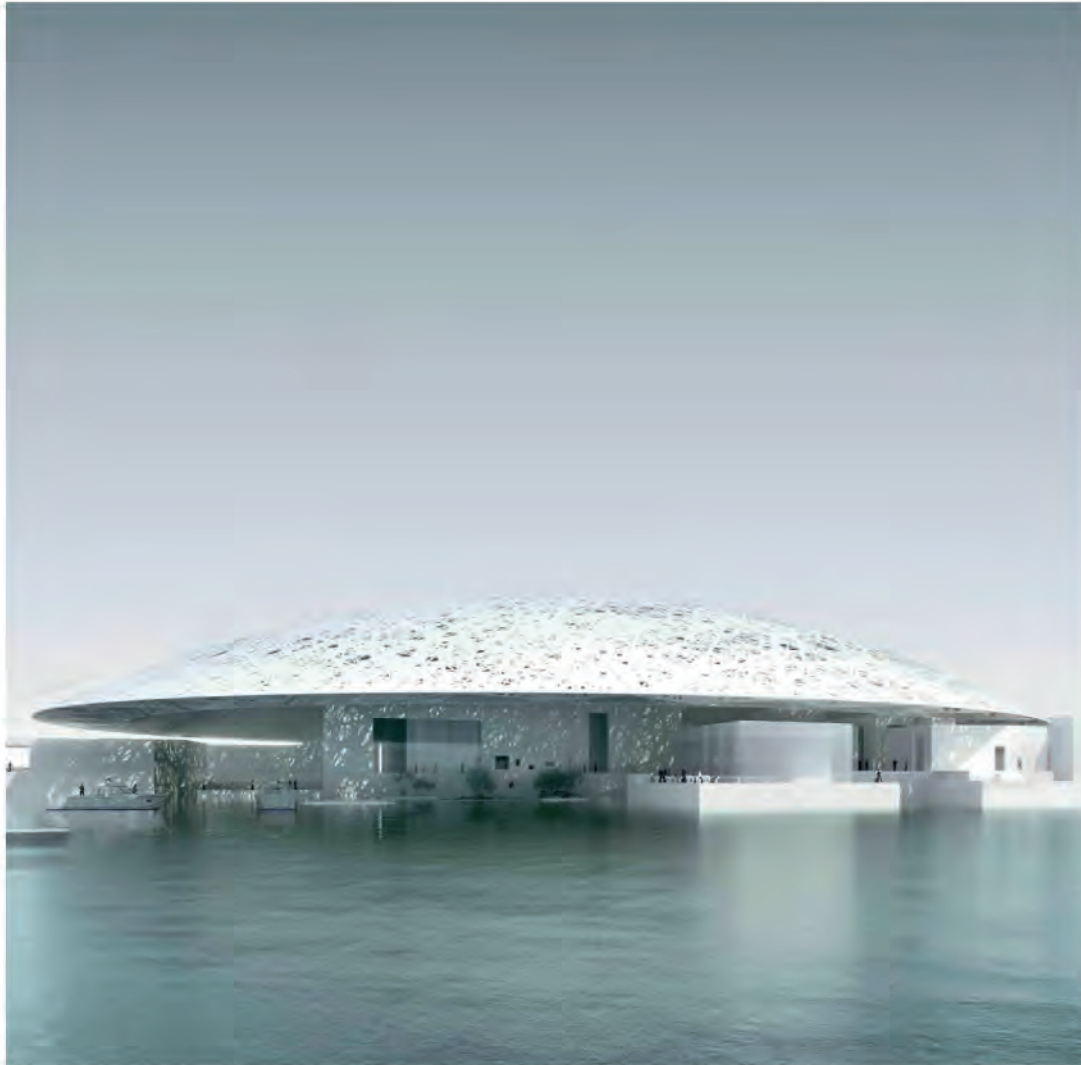
OCEANIA EMEA ASIA AMERICAS



# The value of global capability

Global Review  
6th Edition

RLB | Rider Levett Bucknall



Louvre Abu Dhabi, Abu Dhabi, UAE Cover: South Australian Health and Medical Research Institute, South Australia, Australia

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### OUR VISION

To be the leading global practice in our markets by delivering sustainable competitive advantage to our clients through the passion of our people.

### OUR VALUES

#### People

To invest in people and value their contribution

#### Industry

To be a beacon of best practice and to lead and shape industry in everything we do

#### Community

To be aware of our social responsibilities and to make our contribution to the community

#### Environment

To be conscious of the difference we can make

#### Customers

To challenge the norm, seek fresh ideas and deliver excellence

#### Suppliers

To act with integrity, honesty and fairness in all our relationships

#### Shareholders

To be a self-owned organisation, to be financially robust and to deliver agreed financial plans

Rider Levett Bucknall is an independent global consultancy practice with a commitment to delivering high quality outcomes through advice focused on cost, quality and sustainability within property, infrastructure, construction and facilities.

### SERVICES

Rider Levett Bucknall offers a comprehensive range of complementary cost consultancy, project management and advisory services from conception, through the design and construction and operational performance of facilities to their eventual disposal or reuse. Our clients have rapid access to the latest industry intelligence and innovations, which serve to enhance value and mitigate risk. We provide expert time management of the relationship between value, time and cost from inception to completion.



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Tracing its roots back to 1785, the firm has a long and proud history of offering an extensive range of cost consultancy and advisory services and delivering award-winning landmark projects.

For over 225 years, Rider Levett Bucknall has been at the forefront of innovation as employees embrace global best practice and local know-how to deliver full property solutions for clients across a number of sectors.

## **CORPORATE RESPONSIBILITY**

Corporate Responsibility in all of its four key areas (people, marketplace, environment and community) is a major focus of our company and integral to our sustainability strategy and the way we do business at Rider Levett Bucknall. Our Corporate Responsibility program covers a broad spectrum of activities including the management of our relations with our employees, clients and the community, as well as the management of our performance in respect of standards to business conduct, environment and human rights.

### **People**

Rider Levett Bucknall understands that recruiting and retaining talented people is the most urgent business challenge facing our industry. Creating a culture in which our employees are engaged and committed is one of our top priorities. More than 3,500 individuals in over 120 offices work together to bring innovative solutions to our clients.

At Rider Levett Bucknall we value, respect and leverage the unique contributions of people with diverse backgrounds, experiences and perspectives to provide exceptional customer service to an equally diverse clientele.

We invest in a number of initiatives to help employees grow and excel, such as learning and development opportunities tailored to different life and career stages.

With over 3,500 professionals in more than 120 offices across Asia, Europe, the Middle East, Africa, the Americas and Oceania, Rider Levett Bucknall offers clients access to the highest quality expertise supported by a depth of knowledge and experience few firms can rival.

### **Marketplace**

Rider Levett Bucknall is committed to being one of the world's foremost construction cost consultancies and leading strategic advisors to our clients. To achieve this, our directors engage with the industry to encourage and support its development and strength through exemplary leadership and advocacy. Our innovative business processes, sustainability leadership and overall business success have been rewarded across the globe.

### **Environment**

We recognise that stewardship for the environment is core to sustainable business development and is of ever-growing importance to the Built Environment as a whole.

Sustainability is a key strategic goal at Rider Levett Bucknall, embedded in our vision as the second driver: delivering sustainable competitive advantage. It means more than simply reducing our impact on the environment. To us, Sustainability means improving the quality of human life while living within the carrying capacity of supporting ecosystems.

### **Community**

We understand that corporate social responsibility involves more than making grand promises. Through partnerships with community and not-for-profit organisations, we support the communities in which we live and work. Rider Levett Bucknall believes in doing well by doing the right thing. We go beyond just saying so, and go on to prove it through our actions.

## CORPORATE HIGHLIGHTS

**RLB takes top employer crown**

**UNITED KINGDOM** – RLB was named Britain's top employer for the sixth consecutive year. The firm took the number one spot in the mid-sized category, awarded by the Corporate Research Foundation.

**CITYSCAPE****Cityscape Qatar**

**QATAR** – RLB exhibited at Cityscape Qatar, an exhibition and conference with a series of forums serving as a platform to introduce new projects to an international audience as part of the realisation of Qatar's Vision 2030.

**Pentad receives PMR Africa Award**

**SOUTH AFRICA** – Pentad received the PMR AFRICA 2014 Golden Arrow Award in the category of Medium Sized Quantity Surveyor firm after a national survey was conducted on quantity surveyors in South Africa. This award has been received by Pentad for 11 consecutive years.

**RLB projects pick up accolades**

**SINGAPORE** – RLB sponsored the World Architecture Festival for a third consecutive year in 2013. Two RLB projects were shortlisted for Future World Building of the Year. Singapore Sports Hub won the leisure-led development category and Brisbane Ferry Terminals won the infrastructure category.

**A****First Rung Programme**

**UNITED KINGDOM** – The programme provides support to young people from West Midlands University Technical College (pictured) to help them to develop a successful career in the construction industry

**B****RLB alliance opens in Cape Town**

**SOUTH AFRICA** – RLB's African alliance opened a third office in Cape Town. RLB entered the African market in 2013 after signing an alliance agreement with Pentad.

**C****Mandela Day**

**SOUTH AFRICA** – In conjunction with Child Welfare Tshwane, Pentad handed out 100 food parcels to children at the Mamelodi Child Welfare Centre.

**D****Al Moltaka**

**DUBAI** – Al Moltaka (The Dubai Society for Construction Professionals) networking group, cofounded by RLB in Dubai, continues to grow into its third year.





#### Hearts of All Ages

USA – RLB’s Denver office sponsored the Hearts of All Ages 2014 Carnival benefiting the University of Colorado Hospital, Department of Orthopedics.



#### CHICOS Conference

DOMINICAN REPUBLIC – RLB sponsored the 2013 Caribbean Hotel Investment Conference and Operations Summit. The conference brings global investors, operators and local Caribbean decision-makers together to discuss hotel and resort investment and trends.



#### RICS International Conference

BRAZIL – The firm supported the RICS International Conference for a third consecutive year. With a desire to help establish and strengthen the RICS international presence, RLB UK chief executive Lance Taylor was appointed to the RICS Global Governing Council in late 2013.



G

#### Run for a reason

HONG KONG – RLB employees were among 73,000 runners in the 18th Standard Chartered Hong Kong Marathon 2014.

H



#### Investment in infrastructure

AUSTRALIA – RLB supported Infrastructure Partnerships Australia’s Annual Infrastructure Orator and the 2014 National Infrastructure Awards, drawing together more than 550 of Australia’s most senior political, public sector and business leaders.

E

#### Kwong Wai Shiu Carnival

SINGAPORE – RLB sponsored a food stall and rallied 40 staff members as volunteers for the annual carnival, which raises funds for the underprivileged and elderly patients of Kwong Wai Shiu Hospital.

F

#### RLB director recognised

AUSTRALIA – RLB Sydney director Stephen Ballesty (pictured right with RLB Canberra director Mark Chappe left), collected the Lifetime Achievement and Professional of the Year Awards and Professional of the Year Awards at the 2013 Infinite Value Awards.

G

#### New Maui office

USA – RLB’s North America practice opened a new office on the island of Maui. The new office is the fourth in the state of Hawaii.

H

#### National Gallery of the Cayman Islands

CARIBBEAN – RLB Caribbean chairman Martyn Bould served as chairman of the building committee and founding board member of the recently completed National Gallery of the Cayman Islands.





## PROJECT HIGHLIGHTS



### ASB North Wharf

AUCKLAND, NEW ZEALAND

ASB North Wharf was awarded the top honour at the Property Council New Zealand Rider Levett Bucknall Property Industry Awards 2014. The project received the coveted Supreme Award as 'the best of the best' at the prestigious annual commercial property development awards. The cutting edge structure also snapped up the best in category award within the Commercial Office Property Award category, and a merit in the Green Building Property category.

[Read more → Pg 18](#)

### Brookfield Place

PERTH, AUSTRALIA

Brookfield Place Perth won three awards including the Australian Development of the Year at the Property Council of Australia Rider Levett Bucknall Innovation & Excellence Awards 2014. The premium-grade, 45-level office tower, which incorporates the latest in workplace design and a unique heritage retail area, was also presented with the Award for Best Office Development and the Award for Best Heritage Development.

[Read more → Pg 20](#)

### Baha Mar

NASSAU, THE BAHAMAS

Baha Mar is the largest single-phase luxury resort project in the history of the Caribbean, and the most substantial currently in development in the Western Hemisphere. The US\$3.5 billion development, slated to open in December 2014 in Nassau, The Bahamas, will create a grand experience of sophisticated luxury and leisure. [Read more → Pg 28](#)







## Jockey Club Innovation Tower, The Hong Kong Polytechnic University

HONG KONG

Jockey Club Innovation Tower at PolyU was officially opened in March 2014. Asia's first design institute dedicated to social innovation will focus on articulating creative and alternative solutions to the complex challenges in the fields of urban sustainability, ageing population, family and youth, and enabling technology for disabled.

[Read more → Pg 47](#)

## Baku Games

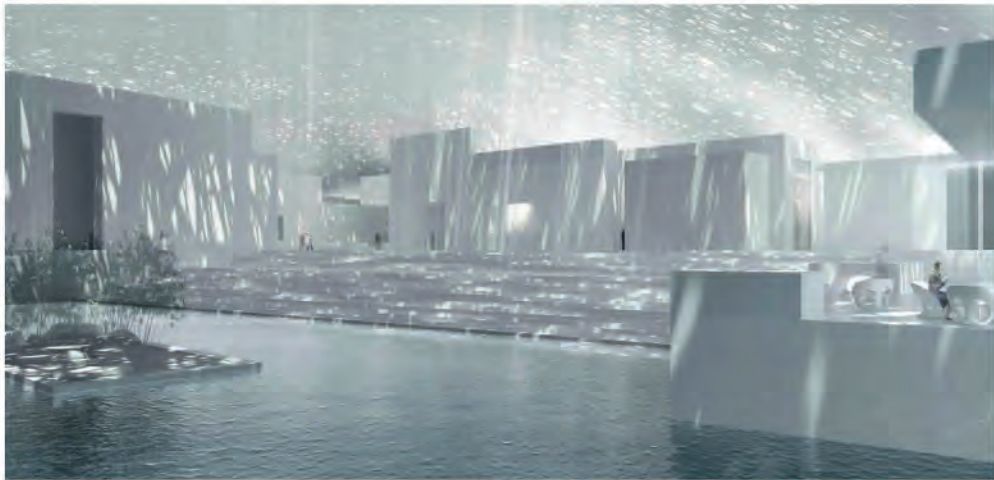
BAKU, AZERBAIJAN

The First European Games will take place in Baku, Azerbaijan in June 2015. It follows an appointment to the Rio 2016 team in 2013 with Rider Levett Bucknall providing costs for the temporary overlay installations for all 30 competition venues for the Olympic and Paralympic Games. This series of contracts follow Rider Levett Bucknall's role in London 2012 where it supported the delivery of the entire temporary overlay for the London Games over a six-year period. This incorporated more than 150 competition and non-competition venues.

[Read more → Pg 58](#)



## PROJECT HIGHLIGHTS



## Louvre Abu Dhabi

ABU DHABI, UAE

The museum, located at the heart of the Saadiyat Cultural District, received the Green Building Award at The Green Middle East Awards for Environmental Excellence at the Expo Centre Sharjah. The achievement illustrates how environmental sustainability can be integrated into large-scale projects.

**Read more** → Pg 43

## Menlyn Maine Central

PRETORIA, SOUTH AFRICA

Menlyn Maines' new head-office for Sage VIP was announced Winner – Office Development Commercial by the South African Property Owners Association (SAPOA), at their last conference in 2013. All Menlyn Maine's buildings must achieve a minimum of a Four-Star Green Star rating by the Green Building Council of South Africa (GBCSA). The streets, residential developments, office buildings, retail outlets, dining establishments, commercial facilities as well as all other public spaces are being designed to promote responsible, healthy lifestyles in a sustainable city precinct.

**Read more** → Pg 37





## Metropolis

LOS ANGELES, USA

The ground breaking for the long-awaited Metropolis development in February 2014 was a lot more exciting than shovels in the dirt because it also included a big reveal of never-before seen conceptual renderings and models. The megaproject will rise on a 6.33-acre site spanning two blocks and is Greenland's first significant real estate deal in the United States.

[Read more → Pg 38](#)

## The Address Residence Fountain Views

DUBAI, UAE

The Address Residence Fountain Views, Downtown Dubai, is the latest milestone to Emaar's pioneering spirit. The Address Residence Fountain Views is a luxury hotel and serviced apartment development in Dubai with spectacular, unobstructed views of Burj Khalifa, the world's tallest building, and The Dubai Fountain.

[Read more → Pg 29](#)

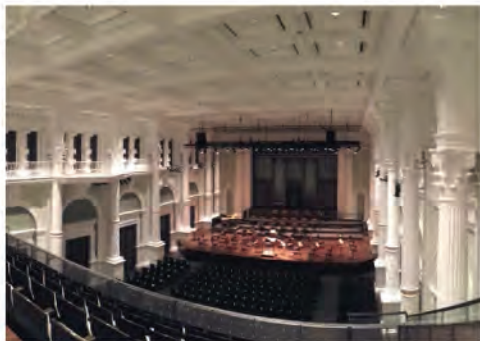


## Victoria Theatre and Concert Hall

SINGAPORE

The newly refurbished grand dames of the Singapore performing arts scene, the Victoria Theatre and Victoria Concert Hall, will host one of its first major events, the 2014 Singapore International Festival of Arts, in August 2014. Rider Levett Bucknall has extensive experience in the conservation and refurbishment of landmark historic buildings across the globe.

[Read more → Pg 45](#)





## INVESTING IN INNOVATION AND KNOWLEDGE

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Rider Levett Bucknall is committed to seeking solutions for our clients, with a dedicated global research and development team in place to ensure our market leadership. While we conduct research across a wide range of issues, we are investing considerable resources in particular areas where we feel we can make a difference. This involves building our existing strengths in fields where we are already a world leader, as well as identifying emerging challenges and opportunities.

### COST REPORTS

Rider Levett Bucknall produces multiple international and regional reports providing timely snapshots of market conditions and construction cost movements around the world, via commentaries from Rider Levett Bucknall directors in key locations.





## RIDERS DIGEST

First issued in 1973, Riders Digest is an annual compendium of regional and international industry information. Along with indicative construction costs by building type and region, Riders Digest contains reference material on development considerations, estimating benchmarks, sustainability and life cycle issues.



## RLB INTELLIGENCE

Rider Levett Bucknall developed the world's first construction cost related smartphone app., which gives users a new platform to access data and analytics in 2011. Features include global cost comparison, inter-city and regional indexation and worldwide construction market analysis and commentary.



## RLB CRANE INDEX™

Rider Levett Bucknall's RLB Crane Index™ published biannually, tracks the number of cranes in the significant centres of mainland Australia and New Zealand. The count gives a simplified measure of the current state of the construction industry's workload in each of these locations.



## EUROPEAN ALLIANCE

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Rider Levett Bucknall delivers services across Europe from its own offices and an established network of partner organisations under the RLB Euro Alliance.

This consists of 22 independent specialist consultancy firms across Europe covering the markets of Central and Eastern Europe as well as the main Western countries.

Rider Levett Bucknall's global board members are photographed with European Alliance affiliates. The 2015 conference will be held in Berlin.



This commitment to delivering high quality services at a local level ensures our clients benefit from local expertise underpinned by the service approach and track record from our offices throughout the world.

Many projects have been delivered in this way, in sectors as diverse as energy, sport, hotels and commercial.

For two years the global board has coincided their UK meeting with the European Alliance Conference. The bonding and progress has been magnificent.

This year, we formalised our relationships with all our affiliates to deliver the depth of governance and structure expected by our clients. This governance creates a platform for a co-ordinated approach to service delivery and sharing of expertise, increasing the breadth and depth of capability and capacity offered by Rider Levett Bucknall.

The relationship with our European partners is further demonstrated through the production of European Construction Costs Reports.





Rider Levett Bucknall has been evolving continuously for more than 225 years – and we will keep on developing to remain a vital part of the solution for our long-standing clients.

### **THIS IS THE 6TH GLOBAL REVIEW FOR RIDER LEVETT BUCKNALL**

It's a great privilege to be writing my first message as Rider Levett Bucknall's chairman – especially since I started my career with Rider Levett Bucknall in 1981 after graduation from university. Given my long-standing connection with Rider Levett Bucknall, I have a genuine affinity with the brand and a strong belief in the company's ability.

### **THE VALUE OF GLOBAL CAPABILITY**

Our strategy is very much focused on adapting to global practice connectivity across the world to support global clients and international projects.

I believe the interregional collaboration taking place amongst our staff and offices is what continues to drive our success and is the key factor that sets us apart from our competitors. This increased connectivity not only strengthens our team but also allows us to continue to provide our clients with the highest level of service.

We remain committed to achieving our three core strategic goals by:

1. Offering independence, innovation and commitment to quality service delivery
2. Leading the way with best practice in sustainability, reducing impacts and increasing value
3. Calling on our commitment and expertise across the globe.

We made marked progress towards these strategic goals on a number of fronts this year.

### **BUILDING ON OUR HISTORY**

Rider Levett Bucknall is an independent company with a long history of achievement, and we are working hard to realise our vision of becoming the leading global practice in our markets.

We've grown with our clients since 1785, continually developing our services to suit their ever-changing needs. Throughout the years, we've steadily expanded into new communities to provide support for our growing client base.

We've evolved our services continually over the past two centuries by adopting many advances in technology. These advances have enabled us to deliver our services more efficiently – and meet the increasing expectations of our clients.



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Against that backdrop, we continue our focus on two constants that have guided us through our history.

The first is the significance of what we do. The major projects showcased in this review underscore the property industry's contribution to the built environment. Rising living standards depend on economic growth, and we aim to use our leadership and expertise to deliver advanced projects of great complexity required to support economic growth.

The second is how we operate. This is outlined in our vision and values on page two and in the highlights section on pages four and five.

## INVESTING IN TECHNOLOGY

Today, we're as determined as ever to invest in technology and unlock its potential.

Our renewed focus on innovation and technology has the potential to improve Rider Levett Bucknall's profitability and competitiveness. We continue to develop new in-house capabilities to add value to the services we provide.

The firm is harnessing new technologies such as Building Information Modeling (BIM) to deliver game-changing results in terms of cost savings. We utilise interoperable estimating software, which allows the seamless travel of digital information between members of the design team promoting collaboration and leveraging collective expertise and experience.

## INVESTING IN GROWTH OPPORTUNITIES

This year we announced our cost management role on the A\$11 billion proposed WestConnex project that will be the largest infrastructure project to be completed in Australia. This appointment builds on our capacity to connect teams – physically and digitally – to deliver results.

It's also been an important year of transformation and progress. But whilst we're changing, we remain relevant and steadfastly committed to ensuring our clients remain at the heart of everything we do.

Many of our offices recently participated in award-winning projects, setting high standards for quality and heightening our reputation and global presence.

## EXPANDING OUR GLOBAL PORTFOLIO

Driven by our world-class capabilities, we are committed to expanding our portfolio thereby enhancing recognition and consideration for high-value commissions. And, we continue to seek to expand our portfolio in order to generate future growth opportunities for the company.

Our African alliance partner Pentad recently opened an office in Cape Town, South Africa. We established new business in Malaysia and further consolidated new business across the Middle East and Caribbean underpinning our strategy of broad development through a combination of organic, acquisitive and allying growth.

The Hong Kong practice opened the second office and added staff to keep up with their increased business. The Americas practice moved their Chicago office into a larger space and opened a new office on the island of Maui located in Kihei, Hawaii.

The RLB Euro Alliance continues to go from strength to strength. There are now 22 countries signed up to the RLB Euro Alliance, which ensures we have a solid platform to deliver services throughout the region in partnership with local businesses.

Activity is now increasing in Europe and we are working on projects in places including Turkey, Germany, Netherlands and Scandinavia.

## OUR STRATEGIC PLAN

We strive to put our clients' long-term best interests first, providing solutions from staff who feel valued and have exciting career opportunities. Our shareholders can have confidence that we are well managed, ambitious, strategic and, over the cycle, provide reasonable returns.

Our business encourages diversified growth and recognises the mutual importance of all our stakeholders: clients, staff, shareholders and society.

We remain focused on strengthening our relationships with clients, governments and communities to ensure we are the partner of choice, ensuring our vision of delivering sustainable, competitive advantage through the passion of our people is attained.

During 2013-14, Rider Levett Bucknall's value-led, disciplined approach ensured we took key steps to achieve our vision of delivering sustainable competitive advantage.

We made significant progress with the three elements of our 2012-17 Group Strategy: maximising our core business; leveraging our proven capabilities; and growing our portfolio.

In line with the first element, Rider Levett Bucknall is working on many prominent projects around the world – many with famous international designers. Our involvement in the Football Club Barcelona (FC Barcelona) Stadium and the Singapore Sports Hub continues to further our sports capabilities, while our work on Unionsun Plaza in China and the Metropolis project in Los Angeles will expand our iconic projects portfolio.

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## PEOPLE

As the company strives to be a global leader within property, construction, infrastructure and facilities, internally we focus on building our employees' own leadership capabilities. We continue to offer staff training and development opportunities, to engage and inspire our workforce, and to establish leadership succession planning.

In 2013 one acknowledgement of the success of this focus was winning the mid-sized category in the list of 'Britains Top Employers' for a sixth consecutive year.

Our pool of talented individuals with technical and leadership expertise continues to grow through our successful graduate and trainee programs.

## MARKETPLACE

In 2013-14 we continued to engage with the industry to encourage and support its development and strength through exemplary leadership and advocacy.

We established a number of global best practice teams, providing continuous improvement in a number of key sectors and committed to ongoing sponsorship of important events on the world stage such as the World Architecture Festival (WAF) and RICS International Conference.

## ENVIRONMENT

In line with our aspiration to be a partner of choice, in 2013-14 we continued to focus on achieving world-class environmental performance, we aspired to lead the way with best practice in sustainability, reducing impacts and increasing value and to be conscious of the difference we can make.

With market conditions leading to a focus on more efficient use of built environment assets, several green building projects were advanced in 2013-14 such as the Menlyn Maine 'Green Precinct' project in Pretoria, Africa.

Rider Levett Bucknall was one of the sponsors for 36th Hong Kong Green Run organised by the Hong Kong Distance Runners Club (HKDRC) with an aim to promote eco-friendly ways for a better living.

## COMMUNITY

In terms of social investment, we are aware of our responsibilities to the communities in which we live and work, and support philanthropic programs and organisations throughout the world.

As part of our Corporate Responsibility framework, we strive to be an integral part of our communities, making a positive difference at the local, regional, and national level. Our volunteering initiatives, such as the Kwong Wai Shiu Hospital Carnival in Singapore, aim to support the communities in which we live and work.

The notion of community service is ingrained in the daily operations of our business. It isn't peripheral to what we do. Community service is core business.

## THANK YOU

Thank you to the many people who have made my appointment as chair of Rider Levett Bucknall such a pleasure. I would like to acknowledge the hard work and commitment of my fellow directors and the Global Board – as well as the thousands of colleagues and business partners who are the face of our wonderful brand throughout the world.

Against a backdrop of increasing competition, in 2015 Rider Levett Bucknall will continue to live by our corporate strategy. We also look forward to celebrating our company's 230th anniversary. As always, we remain focused on delivering superior project outcomes for our clients to reinforce our position as a global leader in our markets.



**Philip Lo**  
Chairman

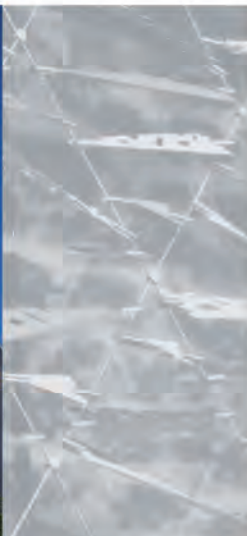
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# Project Capability

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## COMMERCIAL AND FITOUT



### ASB North Wharf

AUCKLAND, NEW ZEALAND



CLIENT KIWI INCOME PROPERTY TRUST AND ASB

ARCHITECT BLYTH VOLLER NIELD AND JASMAX

SERVICES COST MANAGEMENT

By providing innovative facilities for a healthier and more productive workplace environment; a building fabric seamlessly integrated with advanced operational systems technology; and by reflecting a long-term commitment to nurturing a sustainable community within Wynyard Quarter, ASB North Wharf exemplifies a transformational development initiative that also offers an eye-catching landmark building to Auckland City's waterfront.





## Barangaroo South Development

SYDNEY, AUSTRALIA

CLIENT LEND LEASE

SERVICES DUE DILIGENCE, RISK ASSESSMENT,  
COST MANAGEMENT, INDEPENDENT CERTIFICATION

Plans for the A\$6 billion Barangaroo development include a 6.7-hectare Headland Park designed by Peter Walker and 7.5-hectare Barangaroo South development which will comprise a 160-metre-high hotel built on a pier in the harbour, a host of towers and a number of other residential and commercial office buildings.



## Basing View

HAMPSHIRE, UNITED KINGDOM

CLIENT MUSE DEVELOPMENTS

ARCHITECT BROADWAY MALYAN

SERVICES QUANTITY SURVEYING, CONSTRUCTION DESIGN MANAGEMENT  
COORDINATION

Basing View is being redeveloped into a modern 21st century business destination to promote and stimulate new investment in the area. The regeneration of this business district is of vital importance to the commercial future of the region. The planned vision for Basing View will include a mix of new office space, a business class hotel, and other supporting facilities to ensure Basing View is a first-class destination.



The Moment it Clicks Pty Ltd

## COMMERCIAL AND FITOUT



### Brookfield Place

PERTH, AUSTRALIA



**CLIENT** BROOKFIELD OFFICE PROPERTIES AND  
BROOKFIELD MULTIPLEX

**ARCHITECT** HASSELL AND FITZPATRICK & PARTNERS

**SERVICES** COST MANAGEMENT

Brookfield Place Perth is one of Australia's most significant commercial developments. Located in the heart of Perth's CBD, the development's centrepiece is a premium-grade 45-storey office tower at 125 St Georges Terrace, incorporating the latest in workplace design.



## Novartis Offices

JOHANNESBURG, SOUTH AFRICA

CLIENT ATTACQ WATERFALL INVESTMENT COMPANY (PTY) LTD

ARCHITECT AEVITAS GROUP / EMPOWERED SPACES ARCHITECTS

SERVICES FULL SCOPE OF QUANTITY SURVEYING

Novartis is a healthcare products company which provides healthcare solutions that address the evolving needs of patients and societies. They are a world leader in healthcare, with core businesses in pharmaceuticals, consumer health, animal health, eye care and generics.

The new Novartis Offices located in Johannesburg, South Africa, comprise 16,200-square-metres total construction area including three office floor levels and three basement levels.

## Sasol Corporate Head Office

SANDTON, SOUTH AFRICA

CLIENT ALCHEMY PROPERTY DEVELOPMENTS AND PROJECTS

ARCHITECT PARAGON ARCHITECTS

SERVICES FULL SCOPE OF QUANTITY SURVEYING

Construction of a new multi-million rand head office is for the South African firm Sasol, an international integrated energy and chemical company. The 150,000-square-metre project will consist of 10 floors and nine basement levels, and aims to achieve a 5 Star Green rating by the Green Building Council of South Africa (GBCSA).





## COMMERCIAL AND FITOUT



### Snowhill Development

BIRMINGHAM, UNITED KINGDOM

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CLIENT VARIOUS

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ARCHITECT SIDELL GIBSON

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SERVICES QUANTITY SURVEYING, EMPLOYER'S AGENT

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Snowhill is one of the largest city centre office developments outside London to be completed in the last five years. It is also one of the most successful commercial schemes having secured pre-lets to KPMG, Barclays and Wragge Lawrence Graham & Co and post-completion lettings to DWF and i2. Rider Levett Bucknall acted as quantity surveyor at One Snowhill for KPMG and Barclays and as quantity surveyor and employer's agent for Wragge Lawrence Graham & Co at Two Snowhill.

### 5 Murray Rose

SYDNEY OLYMPIC PARK, AUSTRALIA

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CLIENT THE GPT GROUP

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ARCHITECT TURNER & ASSOCIATES

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SERVICES COST MANAGEMENT

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5 Murray Rose sets a new benchmark in what can be achieved in innovative, sustainable design of suburban commercial buildings. The building achieved a 6 Star Green Star – Office Design v2 certified rating and is targeting a 5 Star NABERS energy and water rating. 5 Murray Rose is the first speculative business park development of this scale designed to achieve such a remarkable sustainability outcome and one of the first 6 Star Green Star-rated commercial buildings in Sydney.





## CONVENTION CENTRES

a unique  
opportunity for  
renewal and  
revitalisation

### Sydney International Convention, Exhibition and Entertainment Precinct

SYDNEY, AUSTRALIA

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**CLIENT** LEND LEASE

**ARCHITECT** FJMT / HASSELL + POPULOUS / LEND LEASE DESIGN /  
DCM / AJC

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**SERVICES** COST MANAGEMENT

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The development of Sydney's new international convention, exhibition and entertainment precinct (SICEEP) signifies an exciting era of change and evolution for the city. The International Convention Centre Sydney (ICC Sydney) will be a central element of the precinct and will feature a diverse range of convention, exhibition and entertainment event spaces, allowing the city to host multiple mega events simultaneously.



## HEALTHCARE

### Clinical Services Building Middlemore Hospital

AUCKLAND, NEW ZEALAND

CLIENT COUNTIES MANUKAU DISTRICT HEALTH BOARD

ARCHITECT KLEIN ARCHITECTS

SERVICES COST MANAGEMENT

The new Clinical Services Building at Middlemore Hospital was constructed over two stages to ensure the hospital remained fully operational. Featuring the latest in hospital design, the 35,000 square metre building services the needs of patients and staff in one of New Zealand's busiest and biggest hospitals.

HDR Architecture, Inc. © 2013 All Rights Reserved



### Samuel Simmonds Memorial Hospital

BARROW, UNITED STATES OF AMERICA

CLIENT ARCTIC SLOPE NATIVE ASSOCIATION

ARCHITECT RIM ARCHITECTS, HDR, INC.

SERVICES COST CONSULTANCY, PROJECT MANAGEMENT, SCHEDULING

The collaborative effort between Arctic Slope Native Association (ASNA), and the Indian Health Service (IHS) was very challenging replacing an existing hospital with a new 100,000-square-foot, state-of-the-art, critical care facility to provide the villages of the North Slope of Alaska with advanced healthcare services.

A destination for  
the community,  
promoting  
quality care and a  
place to heal



## South Australian Health and Medical Research Institute

ADELAIDE, AUSTRALIA

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**CLIENT** SAHMR

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**ARCHITECT** WOODS BAGOT

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**SERVICES** COST MANAGEMENT, VALUE MANAGEMENT,  
CONTRACT ADMINISTRATION, ASSET EVALUATION

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A world-class precinct of medical research and clinical application, with state-of-the-art laboratories and equipment in a purpose-built, iconic, 25,000-square-metre facility, adjacent to the site of the new Royal Adelaide Hospital.





Angus Fife, Rice Ferguson Miller

## The Orthopaedic Center

SILVERDALE, UNITED STATES OF AMERICA

CLIENT RICE FERGUSON MILLER

ARCHITECT RICE FERGUSON MILLER

SERVICES COST CONSULTANCY

The three-storey 54,000-square-foot Orthopaedic Center features four of the region's most advanced operating rooms and is designed around the needs of the patient. The center boasts 24 spacious, private rooms, large, well-equipped inpatient and outpatient rehabilitative facilities and an outdoor garden and rehabilitation trail.

Serving the needs  
of the community.  
Inspired by  
the environment





## University of Colorado Hospital Anschutz Inpatient Pavilion 2

AURORA, UNITED STATES OF AMERICA

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CLIENT UNIVERSITY OF COLORADO HOSPITAL

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ARCHITECT HDR, INC.

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SERVICES COST CONSULTANCY

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The US\$400 million 734,000-square-foot expansion program consists of a 12-storey inpatient tower accommodating 144 beds, additional parking, rooftop helipad and dedicated trauma elevators and a 42,000-square-foot addition to the Anschutz Cancer Pavilion. Four shell floors allow for future expansion of the facility.

## HOTELS AND LEISURE



### Baha Mar

NASSAU, THE BAHAMAS

CLIENT THE EXPORT IMPORT BANK OF CHINA

ARCHITECT AECOM

SERVICES PROJECT MONITORING

Rider Levett Bucknall's role as project monitor for the US\$3.5 billion resort followed an enquiry through the firm's Beijing office from The Export Import Bank of China who were seeking a company with experience in the construction of Caribbean resorts coupled with proficiency in Chinese language and culture. The Rider Levett Bucknall team consists of multi-skilled professionals including cost engineering, diverse legal expertise including contract advice, scheduling and overall development strategy.

### Gemstone Business Bay Tower

DUBAI, UAE

CLIENT GEMSTONE REAL ESTATE

SERVICES PRE AND POST CONTRACT COST MANAGEMENT SERVICES

The project is located in the high-end and distinct precinct of the Burj Khalifa. It is a 65-storey building designed for approximately 800 serviced premium luxury hotel apartments of various sizes and will include ancillary facilities such as an amenity level, back of house, restaurant, café, and retail outlets. Externally the project will also include for road works, landscaping, porte cochere and parks.





## Pan Pacific Services Suites Beach Road

SINGAPORE

CLIENT PAN PACIFIC HOTELS GROUP LIMITED

ARCHITECT DP ARCHITECTS PTE LTD

SERVICES QUANTITY SURVEYING

Designed by DP Architects Pte Ltd, the Pan Pacific Serviced Suites is strategically located in the vibrant enclave of Beach Road and Arab Street, just a stone's throw from various local tourist attractions. The 20-storey development comprises 180 suites in sleek and contemporary style, a fitness centre and a rooftop swimming pool overlooking the city.

Photograph courtesy of Pan Pacific Serviced Suites

## The Address Residence Fountain Views

DUBAI, UAE

CLIENT EMAAR PROPERTIES

ARCHITECT DEWAN ARCHITECTS & ENGINEERS

SERVICES POST CONTRACT COST MANAGEMENT

The Address Residence Fountain Views is a luxury development in Dubai with spectacular, unobstructed views of Burj Khalifa, the world's tallest building, and The Dubai Fountain. The project comprises a 65-storey high-rise, high-end hotel and serviced apartment tower and two 59-storey, high-end serviced apartment towers. The towers are built over a 15-storey mixed-use podium comprising retail and parking levels together with a link bridge connection to the adjacent Dubai Mall.





## HOTELS AND LEISURE



The Langham, Chicago

### The Langham Chicago

CHICAGO, UNITED STATES OF AMERICA

CLIENT GREAT EAGLE DEVELOPMENT & PM LTD

ARCHITECT GOETTSCHE PARTNERS, INC.

SERVICES COST CONSULTANCY

Chicago's newest five-star luxury hotel comprises 316 guestrooms within the 52-storey landmark riverfront AMA, the last skyscraper designed by Mies van der Rohe. Given the building's iconic status, the conversion of 13 of its floors into a luxury hotel involved the work of six architects and designers.

### Zhongshan Park Mixed Development

SINGAPORE

CLIENT HH PROPERTIES PTE LTD

ARCHITECT DP ARCHITECTS PTE LTD

SERVICES QUANTITY SURVEYING

Developed by HH Properties Pte Ltd, a joint venture between Hui Ho and SuperBowl Group, this integrated hotel-by-the-park development spans over 190,000-square-feet and comprises two hotels, Ramada Hotel and Days Hotel, an office block and the Zhongshan Mall. Managed by Wyndham Hotel Group, the two independently owned hotels offer 789 rooms. Unique to this development is a 0.46-hectare public park named 'Zhongshan Park' which was built and managed by the developer.

Photograph courtesy HH Properties Pte Ltd







## Brisbane River Ferry Terminals

BRISBANE, AUSTRALIA

CLIENT AURECON

ARCHITECT COX RAYNER

SERVICES DESIGN COMPETITION ADVICE, COST CONSULTANCY

Construction of nine new, flood resilient Brisbane River Ferry Terminals at current locations and one new location at Milton. The cutting-edge design integrates technical innovation, flood resilience and elegant form to deliver terminals that will be iconic features of Brisbane City. The project won the future projects category for infrastructure at the 2013 World Architecture Festival.



## Point Resolution Bridge

AUCKLAND, NEW ZEALAND

CLIENT AUCKLAND CITY COUNCIL

ARCHITECT WARREN AND MAHONEY

SERVICES COST MANAGEMENT

A new pedestrian footbridge to replace the aging 1930s structure, this contemporary bridge features a series of three sculpted arches, which cradle a concrete pedestrian deck. Each arch was designed as a three-dimensional sculptural element – an exoskeleton to support the pedestrian deck sections.

## Magnox Trawsfynydd

NORTH WALES, UNITED KINGDOM

CLIENT MAGNOX

SERVICES DESIGN MANAGEMENT SERVICES

A major nuclear framework contract to provide civil engineering and structural consultancy design management services to Magnox, who operate Trawsfynydd nuclear site in North Wales. The firm is working alongside Arup as part of a four-year framework contract.





## Staatsolie Oil Refinery Expansion

PARAMARIBO, SURINAME

CLIENT BALLAST NEDAM INFRA SURINAME

ENGINEER SAIPEM

SERVICES CONTRACT ADMINISTRATION, QUANTITY SURVEYING

Rider Levett Bucknall continues its excellent relationship with Dutch contractor Ballast Nedam by providing on-site commercial management expertise for civil works in the expansion of the oil refinery.

## Wiri Electric Train Depot

AUCKLAND, NEW ZEALAND

CLIENT AUCKLAND TRANSPORT

ARCHITECT OPUS ARCHITECTURE

SERVICES COST MANAGEMENT

The Wiri Electric Train Depot is a state-of-the-art maintenance and stabling facility for Auckland Transport's new fleet of electric trains. Built on reclaimed quarry land at Wiri adjacent to the North Island main trunk line, the 8,000-square-metre purpose-built facility houses specialised maintenance plant and equipment to service the new trains.







## Barons Quay Redevelopment

CHESTER, UNITED KINGDOM

CLIENT CHESHIRE WEST AND CHESHIRE COUNCIL

ARCHITECT BROADWAY MALYAN

SERVICES PROJECT MANAGEMENT

This historic town centre will be transformed by the riverside development comprising a multi-screen cinema, major food stores, hotel, restaurants, bars and shops plus approximately 100 car parking spaces.

Creating a  
unique visitor  
destination  
with references to an  
industrial heritage





## Debenhams Oxford Street

LONDON, UNITED KINGDOM



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CLIENT BRITISH LAND

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ARCHITECT INGENIUM ARCHIAL LTD

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SERVICES QUANTITY SURVEYING

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Trading continued throughout the refurbishment of the 370,000-square-foot store in one of the most well-known buildings on the UK's premier retail high street. The design team worked closely with acclaimed artist, Ned Kahn, to produce the unique façade design.



## MIXED-USE AND RETAIL



### Hamilton Harbour

BRISBANE, AUSTRALIA

CLIENT DEVINE / LEIGHTON PROPERTIES

ARCHITECT COX RAYNER ARCHITECTS

SERVICES COST MANAGEMENT

Hamilton Harbour is a prestigious modern mixed-use precinct delivering its workers and residents a highly desirable working and living environment. The development has provided a catalyst for the sustained growth of the area.

### Horizon Residence and Office Towers

MAPUTO, MOZAMBIQUE

CLIENT RANI INVESTMENT

ARCHITECT DSA ARCHITECTS

SERVICES FULL SCOPE OF QUANTITY SURVEYING

Scheduled for completion in 2015, Horizon Residence and Office Towers is a US\$150 million (2014 value) project. With a total construction area of 74,000 square metres, it comprises a 20,000-square-metre (18 storey) tower of serviced apartments and a 24,000-square-metre (14 storey) commercial office tower, above a three-storey podium level of parking, incorporating 3,500 square metres of retail space.

## Menlyn Maine Central Square Development

PRETORIA, AFRICA

CLIENT MENLYN MAINE INVESTMENT HOLDINGS (PTY) LTD

ARCHITECT BOGGERTMAN + PARTNERS ARCHITECTS

SERVICES COST MANAGEMENT

Pentad Quantity Surveyors, Rider Levett Bucknall's alliance partner in Africa, is playing a key role in Menlyn Maine, which is a 3.2 million-square-foot 'green city precinct' development, the first in Africa. The 1.45 million-square-foot Central Square project will form the core of the development and will create a new city centre and meeting place for Pretoria.





## MIXED-USE AND RETAIL

### Metropolis

LOS ANGELES, UNITED STATES OF AMERICA

CLIENT GREENLAND GROUP

ARCHITECT GENSLER

SERVICES QUANTITY SURVEYING

The downtown Los Angeles skyline is about to change with the addition of four new gleaming mixed-use towers developed by the Shanghai-based Greenland Group. This Gensler designed project is predicted to be the largest of its type on the West Coast and will comprise a 350-bed, four-star hotel tower, and three condominium towers with over 1,400 units as well as parking for 2,300 cars and ground floor retail.

Promoting a  
dynamic, urban  
downtown lifestyle





## Nakheel Mall and Hotel

DUBAI, UAE

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**CLIENT** RSP ARCHITECTS

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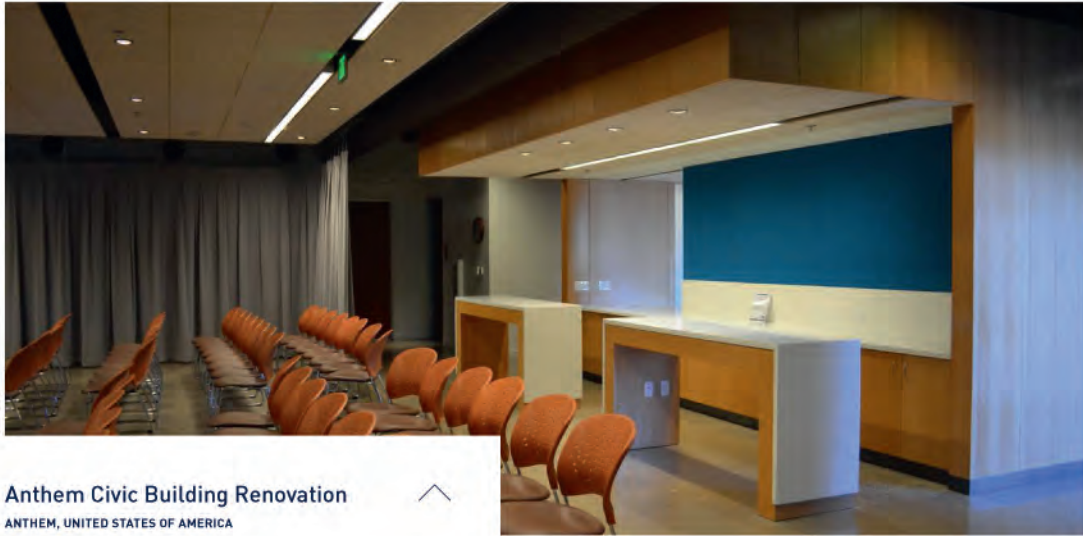
**ARCHITECT** RSP ARCHITECTS

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**SERVICES** FULL PRE AND POST COST MANAGEMENT SERVICES

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The project comprises 437,000 square metres of retail mall complete with three levels of basement parking, three levels of retail space and an open roof plaza containing food and beverage outlets, and various decorative landscape and water features. Integrated into the footprint of the Mall is a five-star, high-rise hotel tower of approximately 45 storeys. Built on the trunk of the world-famous Palm Jumeirah, The Nakheel Mall aims to offer a destination shopping and dining experience with cinema, retail and healthcare offerings, as well as supermarkets and fashion chain retailers.



Holly Street Studio

## Anthem Civic Building Renovation

ANTHEM, UNITED STATES OF AMERICA

CLIENT ANTHEM COMMUNITY COUNCIL

ARCHITECT HOLLY STREET STUDIO

SERVICES PROJECT MANAGEMENT

The 36,500-square-foot community meeting facility occupies an existing two-storey office building. Maximising space through multi-purpose design, the facility also serves as office space for council staff.

## At-Turaif

RIYADH, KSA

CLIENT BIURO HAPPOLD

SERVICES COST MANAGEMENT, PLANNING

This property was the first capital of the Saudi Dynasty, situated in the heart of the Arabian Peninsula, north-west of Riyadh. Originally founded in the 15th century, the site gained full UNESCO World Heritage Listing in 2010. The property is being fully restored to its original state over eight years using traditional construction methods.







a civic destination with a  
distinct architectural  
identity

## Flinders Street Station

MELBOURNE, AUSTRALIA



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**CLIENT** MAJOR PROJECTS VICTORIA

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**ARCHITECT** HASSELL + HERZOG AND DE MEURON

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**SERVICES** COST MANAGEMENT

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Rider Levett Bucknall was selected as part of the winning design team for the redesign of Flinders Street Station. The new railway station will be a civic destination with distinctive architecture, large public plaza, exhibition spaces and courtyards along with education facilities, event spaces, workshops, a library, theatre, and lecture hall.





## Institute of Diplomatic Studies and Consular Affairs

RIYADH, KSA

Commissioned to expand the Ministry's facilities, the new 46,000-square-metre Diplomatic Studies and Consular Affairs Department building will house basement car parking, an auditorium, lecture halls, library, classrooms, a large hall for visa applications and office space.

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**CLIENT** MINISTRY OF FOREIGN AFFAIRS SAUDI ARABIA

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**ARCHITECT** HENNING LARSEN

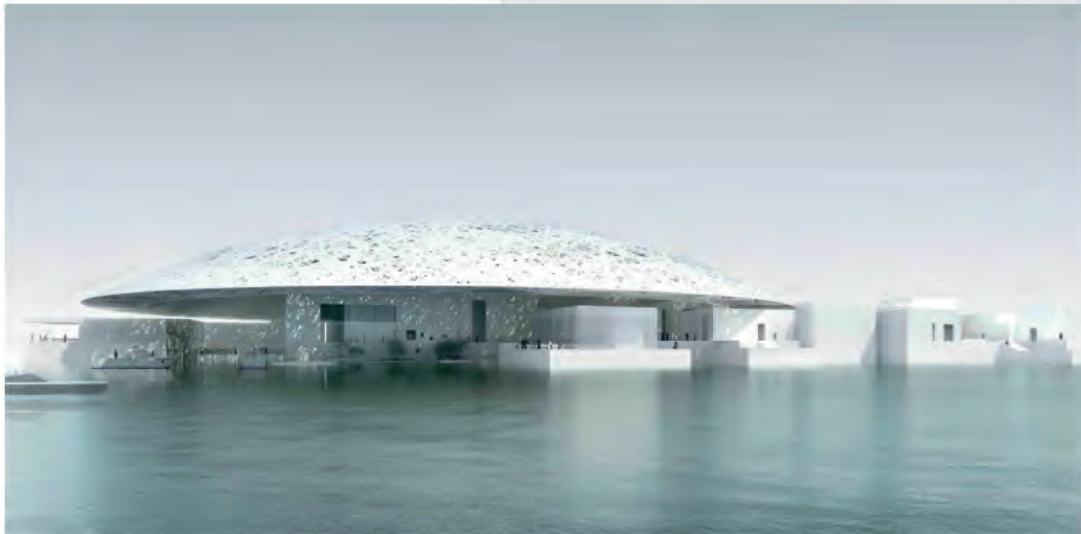
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**PROJECT MANAGER / ENGINEER** BURO HAPPOLD

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**SERVICES** CONSTRUCTION PHASE COST MANAGEMENT

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## Louvre Abu Dhabi

ABU DHABI, UAE

CLIENT TOURISM DEVELOPMENT & INVESTMENT COMPANY (TDIC)

ARCHITECT JEAN NOUVEL

SERVICES POST CONTRACT COST MANAGEMENT

The striking and innovative Louvre Abu Dhabi building was designed by Pritzker Prize-winning architect Jean Nouvel. Combining modern architecture with inspiration drawn from the region's traditions, the design reflects the desire to create a universal museum in which all cultures are brought together.

A 180-metre-wide white dome, an emblematic feature of Arabian architecture, covers two-thirds of the museum. The dome's seemingly random, but carefully designed arrangement of geometric openings was inspired by the interlaced palm leaves traditionally used as roofing material in the Emirates.

Louvre Abu Dhabi will display works of historical, cultural and sociological significance from ancient times to the contemporary era and will encompass 9,200-square-metres of art galleries.

## Park Russia

MOSCOW, RUSSIA

CLIENT RUSSIA GEOGRAPHIC SOCIETY AND MOSCOW REGION GOVERNMENT

ARCHITECT GILLESPIES

SERVICES QUANTITY SURVEYING

Park Russia is an ambitious 1,000-hectare tourist destination located 30 kilometres outside Moscow. The large-scale, long-term scheme heralds a new era of tourism and culture for Russia worldwide. The firm secured its role as part of the Cushman & Wakefield consortium, which won the Park Russia design and development contest set by the Russia Geographic Society and Moscow Region Government.





## Qur'anic Botanic Garden

DOHA, QATAR

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**CLIENT** MEINHARDT MENA

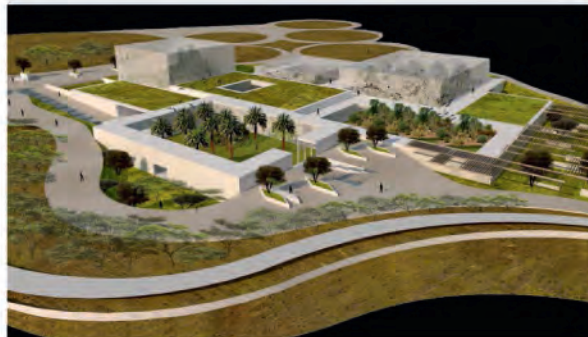
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**SERVICES** PRE CONTRACT INTEGRATED DESIGN MANAGEMENT,  
COMMERCIAL MANAGEMENT

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The mission of the Qur'anic Botanic Garden is to promote knowledge of the plants, botanical terms, and conservation principles mentioned in the Holy Qur'an and Sunnah. This will be achieved by translating the central concepts of aesthetics, knowledge and ethics into an architectural landscape. On completion this will result in a facility that connects nature with ethics, maintaining spiritual meaning for reconciliation and meditation, yet providing an educational facility that is open and accessible to all.

The Qur'anic Botanic Garden will form part of the open space within the Oxygen Park and represents a key amenity within Qatar Foundation's Education City development in Doha.



## Sydney Opera House

SYDNEY, AUSTRALIA

CLIENT SYDNEY OPERA HOUSE TRUST

ARCHITECT JØRGN UTZON AND OVE ARUP /  
EMINENT ARCHITECTS PANEL (VAPS)

SERVICES COST MANAGEMENT

Rider Levett Bucknall's partnership with the Sydney Opera House dates back more than 40 years. In recent years the firm has been a key adviser to the Sydney Opera House Vehicle and Pedestrian Safety project – a State-funded capital works program to enhance tourist and visitor safety.

The A\$152 million Vehicle Access and Pedestrian Safety Project (VAPS) is the largest single capital works program undertaken at the Sydney Opera House since it opened in 1973.

## Victoria Theatre and Concert Hall

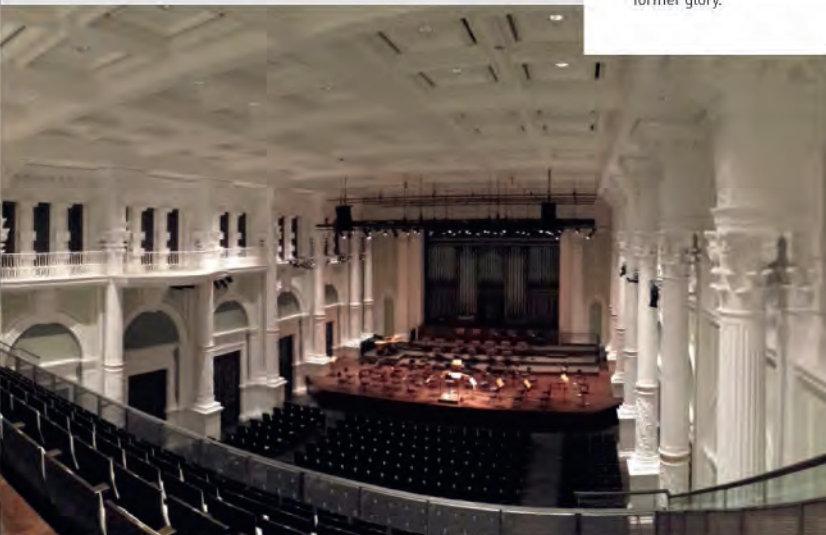
SINGAPORE

CLIENT NATIONAL ARTS COUNCIL

ARCHITECT W ARCHITECTS PTE LTD

SERVICES PROJECT MANAGEMENT, QUANTITY SURVEYING

Designed by W Architects, the refurbished Victoria Theatre and Victoria Concert Hall will be a blend of the old and new, with improved facilities and performance spaces alongside the buildings' original historic elements. Set to achieve optimal environmental sustainability standards, the new theatre will seat 614 while the new concert hall will have 673 seats. Both the Clock Tower and Central Atrium will also be reinstated to their former glory.





## Dr Chau Chak Wing Building, University of Technology

SYDNEY, AUSTRALIA

CLIENT UNIVERSITY OF TECHNOLOGY

ARCHITECT GEHRY PARTNERS LLP

SERVICES COST MANAGEMENT

A key component of the University of Technology (UTS) City Campus Master Plan is to provide teaching, learning, research and office accommodation for the UTS Business School. UTS appointed Rider Levett Bucknall to work with Gehry Partners LLP in the conception of the world-class business school.

## Integrated Teaching Building, Chinese University of Hong Kong

HONG KONG

CLIENT THE CHINESE UNIVERSITY OF HONG KONG

ARCHITECT ARCH DESIGN ARCHITECTS LIMITED IN ASSOCIATION WITH  
LLEWELYN-DAVIES HONG KONG LIMITED

SERVICES QUANTITY SURVEYING

An Integrated Teaching Building in The Chinese University of Hong Kong accommodates innovative teaching facilities as well as provisions for staff and communal space to meet practical needs for general teaching, and specific teaching facilities. The building began with Louis I. Kahn's idea of a 'school' with an exchange of ideas underneath a tree. This is manifested by the creation of a folding 'common ground' within an atrium space thereby becoming the heart for the school where various learning activities can take place. The multi-storey platforms and link bridges create an open, highly flexible and permeable space promoting different uses and configurations.

The project received The Hong Kong Institute of Architects – Merit Award of Hong Kong 2012 and the FuturArc Green Leadership Award 2013.



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## Jockey Club Innovation Tower, The Hong Kong Polytechnic University

HONG KONG

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**CLIENT** THE HONG KONG POLYTECHNIC UNIVERSITY

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**ARCHITECT** ZAHA HADID ARCHITECT

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**SERVICES** QUANTITY SURVEYING

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Construction of a 15-storey building, which houses the School of Design for the Hong Kong Polytechnic University and the Hong Kong Jockey Club Design Institute for Social Innovation. Facilities include a lecture hall, 10 classrooms, design studios and workshops, offices, a design museum, exhibition galleries and a common viewing lounge.

The tower has a construction floor area of 27,500-square-metres and is designed to maximise space within a constrained site. Its unique façade features a curved profile curtain wall system.



## RESEARCH AND EDUCATION



### King's College London

CHAMPION HILL, UNITED KINGDOM

CLIENT KING'S COLLEGE LONDON

ARCHITECT GWP ARCHITECTS

SERVICES PROJECT MANAGEMENT, QUANTITY SURVEYING

Construction of the £40 million Champion Hill redevelopment comprising 720 student residences across four new-build blocks and the renovation of a Grade II listed building which accommodates the student social hub and support services.

### Middlesex University

LONDON, UNITED KINGDOM

CLIENT MIDDLESEX UNIVERSITY

ARCHITECT VARIOUS

SERVICES PROJECT MANAGEMENT

The university has invested more than £200 million to consolidate much of its teaching and research onto the flagship campus in Hendon, North London. Works include refurbishments, adaptations, modifications, new build and upgrade of existing facilities.



## National Automotive Innovation Centre, The University of Warwick

COVENTRY, UNITED KINGDOM

CLIENT THE UNIVERSITY OF WARWICK

ARCHITECT CULLINAN STUDIO

SERVICES PROJECT MANAGEMENT

Rider Levett Bucknall is part of a design team alongside Cutlinan Studio, Arup and Buro Four for the multi-million pound development of the National Automotive Innovation Campus (NAIC) alongside Warwick Manufacturing Group (WMG) at The University of Warwick. NAIC will create and develop technologies to reduce the dependency on fossil fuels and to reduce CO<sub>2</sub> emissions. In addition to other work on the latest advances in automotive technology, it will also develop a stronger supplier base in the UK.



## Peterborough City Council Schools Framework

PETERBOROUGH, UNITED KINGDOM

CLIENT PETERBOROUGH CITY COUNCIL

ARCHITECT VARIOUS

SERVICES PROJECT MANAGEMENT, ADVISORY

The £250m long-term schools capital investment program with the most recent project the £7 million expansion of Gladstone Primary School in Peterborough. Plans for Gladstone include the development of a new building on a nearby second site enabling the school to increase enrolment capacity.





## RESEARCH AND EDUCATION

### The Braggs

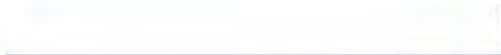
ADELAIDE, AUSTRALIA

CLIENT UNIVERSITY OF ADELAIDE

ARCHITECT BLYTH VOLLER NIELD / HAMES SHARLEY

SERVICES COST MANAGEMENT AND CONTRACT ADMINISTRATION

The Braggs houses the Institute for Photonics and Advanced Sensing (IPAS) and an undergraduate teaching facility at the University of Adelaide. It incorporates research, undergraduate laboratories, and a 420-seat lecture theatre. The building enables researchers from different scientific disciplines to come together to facilitate a multidisciplinary approach to research and support formal and informal collaboration.





Buildings that  
attract the  
best thinkers  
by fostering formal and  
informal collaboration

## University of Manchester Framework

MANCHESTER, UNITED KINGDOM

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CLIENT UNIVERSITY OF MANCHESTER

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SERVICES CONSTRUCTION DESIGN MANAGEMENT COORDINATION

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Having been employed on a framework with the university since 2007, Rider Levett Bucknall has delivered over 50 projects ranging from small-scale maintenance, up to large refurbishments. The firm is currently working on the campus-wide fire remedial works to the value of £1.5 million, and the external decoration of buildings across campus, valued at £2 million.

## RESEARCH AND EDUCATION



Joseph Parnis, 2013

### University of Oregon Lewis Integrative Science Building

EUGENE, UNITED STATES OF AMERICA

CLIENT UNIVERSITY OF OREGON

ARCHITECT HDR, INC., THA ARCHITECTURE INC.

SERVICES COST CONSULTANCY, SPECIAL STUDIES, VALUE ENGINEERING

A five-storey 103,000-square-foot building located on the University of Oregon campus is the new home to research facilities for studies related to the human brain, nanotechnology, neuroscience, green materials chemistry, molecular biology and solar energy. Featuring a large atrium that acts as a collaborative meeting space, the facility uses 58% less energy than conventional buildings of similar size and function and is designed to achieve LEED Platinum-certification.

### University of Reading Malaysia Campus at EduCity

BANDAR NUSAJAYA, MALAYSIA

CLIENT UNIVERSITY OF READING

ARCHITECT SCOTT BROWNRIDD

SERVICES QUANTITY SURVEYING

Johor Bahru is a 27,000-square-metre development designed to deliver the University of Reading experience in Asia. Up to 2,500 students will attend the university, which is designed to recreate Reading's parkland style campus in Malaysia.







A world-class place  
to gather for study, learning or  
simply to meet friends

## Victoria University of Wellington Campus Hub

WELLINGTON, NEW ZEALAND

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**CLIENT** VICTORIA UNIVERSITY OF WELLINGTON AND VUW STUDENTS' ASSOCIATION

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**ARCHITECT** ATHFIELD ARCHITECTS AND ARCHITECTUS

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**SERVICES** COST CONSULTANCY

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Victoria University of Wellington, in partnership with the Students' Association Trust, created a vibrant new central heart for its Kelburn Campus. The Hub combines cafés, food outlets and shops with specially designed areas for socialising and informal learning spaces.

## RESIDENTIAL

## Flintshire Framework

NORTH WALES, UNITED KINGDOM

CLIENT WALES &amp; WEST HOUSING ASSOCIATION

SERVICES QUANTITY SURVEYING, CONSTRUCTION DESIGN MANAGEMENT  
COORDINATION

A £5.5 million residential scheme in Greenfield, Flintshire comprising 58 new homes and a £5.3 million extra care and supported living complex in Newtown, Powys. The latter comprises a mix of 39 one- and two-bed apartments in addition to communal facilities and nine apartments providing accommodation for residents with low level support needs.



## Settlers Beach Hotel

BARBADOS

CLIENT TRADEWINDS HOTELS LTD.

ARCHITECT GILLESPIE &amp; STEEL ASSOCIATES LTD

SERVICES COST CONSULTANCY

Rider Levett Bucknall has been appointed cost consultants on this multi-million dollar residential scheme on the west coast of Barbados, which comprises the redevelopment of the existing Settlers Beach Hotel into ultra-modern oceanfront luxury residences. The development consists of 12 large luxury villas with private 20-foot pools and gardens together with other facilities arranged around a 118-foot communal pool with extensive contemporary landscaping.



## Soleil

BRISBANE, AUSTRALIA

CLIENT MERITON APARTMENTS PTY LTD

ARCHITECT DBI DESIGN PTY LTD

SERVICES COST MANAGEMENT

Soleil was Meriton's first foray into the Queensland capital and, upon completion, became the tallest residential tower in Brisbane. This landmark tower is an architectural masterpiece, impressing with its sheer beauty and offering an exceptional lifestyle that offers awe-inspiring views. The iconic tower boasts superb luxury apartment living rising 74 floors into the Brisbane CBD skyline.





Championing an environmentally conscious build, replete with renewable resources

## The Tembusu

SINGAPORE

CLIENT WINSMART INVESTMENT PTE LTD

ARCHITECT ARC STUDIO ARCHITECTURE + URBANISM

SERVICES QUANTITY SURVEYING

Developed by Wing Tai Holdings Limited, The Tembusu is a high quality freehold condominium project built on the developer's former headquarters, approximately 500 metres from Kovan MRT station. The 338-unit development comprises five blocks of one- to four-bedroom typical units, dual key and penthouses and includes several sustainable features.



## Arizona State University Polytechnic Campus Sun Devil Fitness Complex

MESA, UNITED STATES OF AMERICA

CLIENT ARCHITEKTON

ARCHITECT ARCHITEKTON

SERVICES COST CONSULTANCY

A 62,000-square-foot building designed to meet the recreation and health services needs of the ASU Polytechnic Campus. The facility features cardio and weight training and mixed martial arts, gymnasiums and courts. Transparent surfaces maximise interior views within the facility and exterior views outside the building.

Attracting students  
into a program that will lead  
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Don Baldwin - MA Architecture Photography



## Baku Games

BAKU, AZERBAIJAN

CLIENT EUROPEAN GAMES OPERATION COMMITTEE

ARCHITECT VARIOUS

SERVICES QUANTITY SURVEYING

Rider Levett Bucknall is delivering quantity surveying services to the inaugural European Games, which is being hosted in Baku in 2015. Using teams from its London and Sydney offices Rider Levett Bucknall will be responsible for appraisals of all venues, including drafting overlay estimates and budgets and providing gap analysis reviews.

## Football Club Barcelona Stadium

BARCELONA, SPAIN

CLIENT ICON VENUE GROUP

SERVICES QUANTITY SURVEYING

FC Barcelona are set to redevelop the existing stadium structure with an estimated project cost of €600 million. The proposed design increases stadium accessibility and capacity and features improved hospitality and VIP facilities.



## Oregon State University Basketball Practice Facility

CORVALLIS, UNITED STATES OF AMERICA

CLIENT HNTB

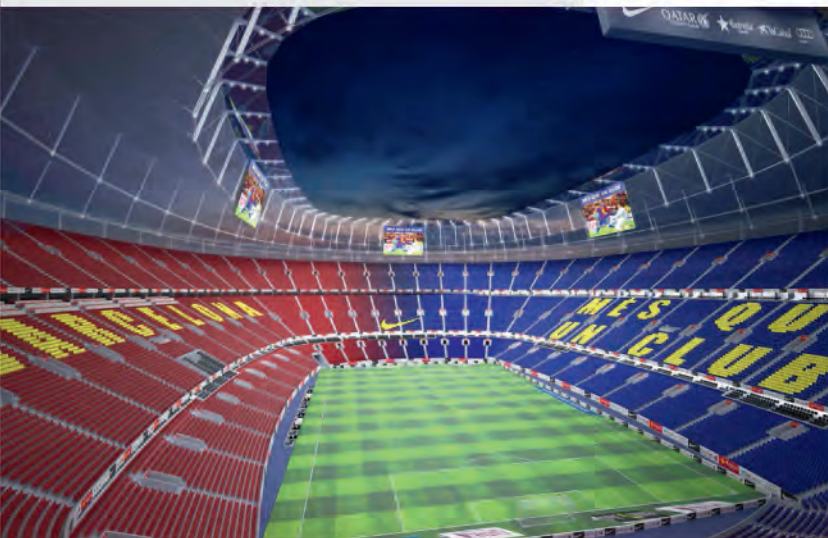
ARCHITECT HNTB

SERVICES COST CONSULTANCY

Occupying more than 40,000 square feet, the two-level building was established as part of an Athletic Master Plan. Site constraints meant the two courts needed to be stacked on top of one another. Each court is approximately 9,600 square feet with administration and coaching facilities in close proximity.



Rendering courtesy HNTB



## SPORT

### Qatar Handball Association Complex

DOHA, QATAR

CLIENT REDCO CONSTRUCTION AL MANNA

ARCHITECT IGH

SERVICES CONSTRUCTION PHASE COST MANAGEMENT

The primary function of this multi-function hall is to host indoor sports and in particular the World Handball Championships in 2015. The facility consists of a 5,350-seat indoor stadium, two practice courts with 500 seats and back of house facilities suitable for hosting international sports events. In addition the facility will also house 60 rooms for player accommodation and a 25-metre-four lane swimming pool.



Touted to be one of the  
most advanced  
handball complexes ever built

### Singapore Sports Hub

SINGAPORE

CLIENT SINGAPORE SPORTS COUNCIL

ARCHITECT DP ARCHITECTS AND ARUP ASSOCIATES

SERVICES COST CONSULTANCY

The Singapore Sports Hub is one of the world's largest sports facilities infrastructure Public-Private-Partnership (PPP) projects comprising elite sports, leisure, entertainment, community and commercial facilities. Located on a 35 hectare site next to the city centre, the Sports Hub will comprise a 55,000-capacity National Stadium; 6,000-capacity indoor Aquatic Centre; 3,000-capacity Multi-Purpose Indoor Arena; Water Sports Centre featuring dragon boating, kayaking and canoeing; 41,000 square metre retail and waterfront; the Singapore Indoor Stadium; Sports Museum; Sports Library; and daily community facilities and activities. The project won the future projects category for leisure at the 2013 World Architecture Festival.



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# Market Review

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## AFRICA



The South African construction industry has, of late, undergone a sustained period of inactivity following the 2010 FIFA World Cup, throwing the industry into a mini recession. This is as a result of a decrease in public and private spending as business recovers from the budgetary stresses of recession, as well as a decrease in foreign investments.

During 2012 and the first half of 2013 many of the smaller (and the so-called 'speculation') construction companies have had no choice but to decrease their rates by as much as 30%, resulting in companies either struggling or being liquidated in some cases as they fail to compete with the low rates in the market.

The general economic outlook for the South African economy, remains sensitive following a downward forecast by the South African Reserve Bank of the 2014 GDP, with the economy expecting to grow between 2% and 2.5%. Although conditions in the US may have shown some recovery in 2013, the Eurozone remains depressed. Consumer inflation in South Africa is currently just below the 6% mark (the upper target limit of the Reserve Bank) but a weaker currency and the steady increase in fuel prices since November 2013 continue to pose an upside risk to inflation.

The residential property market in South Africa has strengthened. The first five months of 2013 saw levels of residential building activity rising by more than 10% compared with a year ago. The volume of building plans for new housing approved by local government institutions increased by 11.3% year to year, and the construction phase of new housing saw growth of 8.6% year to year both largely driven by the segment for apartments and townhouses. The improvement in the number of square metres of approved plans for the private sector is more encouraging. This increase



was mostly for the construction of non-residential buildings.

The retail industry has grown over the past years, supported by an increase in both the supply of retail space and the number of shopping centres in the country. The industry grew by an annual average of 3% in the past eight years. The country has seen a boom in shopping centre development and townships have also benefited from this.

On the public sector front President Zuma announced in his 2013 State of the Union speech allowance for a number of new infrastructure projects. This included mining-related, roads and highway networks, agricultural and industrial projects as well as electrical infrastructure for a total infrastructure budget of R827 billion over the next three years. The civil engineering industry is hopeful that some of these funds will become available during 2014.

The industry has shown more than healthy signs of recovery over the past 12 months. South Africa's increased role in the BRIC's group of countries as well as its position as gateway to Africa will strengthen its economic status over the long term which will result in increased investment in the country which in turn is good for the

construction industry. It is estimated that the infrastructure projects pipeline is valued at R4 trillion over the next 20 years, which indicates positive growth lies ahead. Infrastructure is the essence of economic development and it is important that South Africa's public and private sectors work together constructively.

On the commercial side there was a sudden increase in business during the second half of 2013. This was mostly for big commercial projects to be constructed and all of the larger South African professional quantity surveying, architectural and engineering practices are currently extremely busy. The improvement in the number of square metres of approved plans for the private sector is more encouraging. This increase was mostly for the construction of non-residential buildings.

It is expected that this positive growth will continue during 2014 and even further in the future as the economy moves out of the recession of the past.



## UNITED STATES OF AMERICA

2013 saw the United States continue its crawl out of 'The Great Recession'. GDP growth was relatively modest at 1.9%, inflation (as measured by the CPI) was also low at 1.5% but unemployment remained stubbornly high at 7.4%. Nevertheless it managed to maintain its position as the world's largest, single, national economy with GDP of US\$16.8 trillion.

The construction industry continued to show improvement during 2013, but at a slow and uneven pace as it has for last several years. In line with the uneven increases, the Architectural Billings Index (ABI) wavered throughout the year. During the first and second quarters of 2013 the ABI remained just below 52 but increased in the third quarter to 54.3. And in the fourth quarter, the ABI dropped to 48.5. Despite the ABI fluctuation, the US Department of Commerce reports that construction put in place during December 2013 was estimated at a seasonally adjusted annual rate of \$930.5 billion which is 5.3% above the December 2012 estimate of \$883.6 billion. The total value of construction in 2013 was \$898.4 billion, 4.8% above the same period in 2012. With construction increasing in 2013, construction unemployment fell from 14.7% in the first quarter to 11.4% in the fourth quarter.

In the major cities where Rider Levett Bucknall provides a survey on the Construction Activity Cycle, the construction industry continued to show an uneven recovery. The greatest increases were seen in Boston, Chicago, Honolulu, New York and Washington, DC with escalation between 4.7% and 7.7%. The cities with a more modest annual increase between 1% and 3.5% were Denver, Los Angeles, Phoenix, Portland, San Francisco and Seattle. Las Vegas is continuing to recover; however, it has the lowest annual increase at 0.9%.

Housing continued to lead the construction industry expansion and according to the National Association of Home Builders (NAHB) housing starts increased to 924,000 in 2013 and is expected to increase in 2014 to approximately 1.15 million. Despite the increase, housing starts remain less than the perceived long-term requirement to keep up with the population growth.

Other sectors that saw an increase in 2013 include hospitality, education and institutional buildings and manufacturing. Commercial buildings also saw an increase but more noticeably in the cities where vacancy rates were the lowest like New York and less quickly in cities with higher vacancy rates such as Atlanta and Phoenix. With the improved forecasts, General Contractors' optimism is once again being fuelled and many firms are planning to start hiring again. The Bureau of Labor Statistics reports that the construction sector is projected to gain 1.6 million new jobs over the 2012-22 decade. Despite the expected increase in new construction jobs, there may be periods of labor shortages within the timeframe as many workers left the construction industry during the recession.



The construction industry continued to show improvement during 2013, but at a slow and uneven pace as it has for last several years.

In 2013, the government saw its share of turmoil. At the beginning of the third quarter, the infamous Federal Government shutdown took place and ran from October 1 to October 16. Although the shutdown apparently damaged nothing more than the already tatty reputations of the United States Congress and the Administration, it did temporarily dampen consumer confidence, which had slowly risen throughout the year and only really made a recovery in December. While there was a dearth of Federal Government projects in 2013, Rider Levett Bucknall observed a modest increase in city, county and education projects and was delighted to be able to assist its clients with these.

In regards to private sector work, the North American practice continued to win projects across a variety of sectors and building types some which include public assembly, hospitality and commercial. Although consumer confidence took a dip in the beginning of the third quarter due to the Federal Government shutdown, it has continued to increase which has allowed for a number of opportunities in both new-builds and renovations within the hospitality and commercial sectors. As we look to the coming year, our focus will be on expanding our work in all sectors but especially in healthcare, hospitality, public assembly and education.

## CARIBBEAN

The IMF reports tepid growth in most of the Caribbean. It is expected to average 3% in both 2014 and 2015, up slightly on 2013. The tourism-dependent economies are expected to grow on average by 1.4% in 2014 and the commodity exporters by 3.2%. Reducing high public debt levels remains a key challenge in much of the Caribbean along with further efforts to address long-standing competitiveness problems, notably in the tourism-dependent economies. Strongest prospects are for Dominican Republic and Haiti (both expected to grow by at least 4% in both 2014 and 2015), while others – including St Lucia, Grenada and Barbados – will struggle to exceed 1% growth in either year.

Foreign Direct Investment flows to the Caribbean increased for the fourth consecutive year in 2013, with 54 new projects. The hotel and tourism sector was a major beneficiary. Dominican Republic again led the way, followed by Trinidad and Tobago and Haiti. Spain and the US were the main investors.

The number of Caribbean visitors increased by 1.8% in 2013 to 25 million, although this growth rate was behind a number of other regions and the 4.9% increase in 2012. The US, which supplies almost half its visitors, saw a 2.9% increase.

The improvement in the hotel industry continues. In the first three months of 2014, occupancy was up 1.3% on the previous year at 67.1% and the critical revPAR (revenue per available room) was up by 6.1% at \$128. In the luxury hotel category, occupancy was up by 3.2% to 64% and revPAR up 8.3% to \$245.

The hotel pipeline shows 11,000 rooms under construction at March 2014 – up from 10,000 at March 2013 – with a further 15,500 at the planning stage. The luxury end accounts for 3,700 (33%) of the total rooms under construction.

There are some US\$17 billion of pipeline infrastructure projects in the region most of which expect to be procured using the PPP route.

As reported in the Caribbean Report Q4 2013 RLB is of the opinion that there has been a small rise in construction prices over the past 12 months with a continuation of that trend for the next year or so.

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Reducing high public debt levels remains a key challenge in much of the Caribbean along with further efforts to address long-standing competitiveness problems, notably in the tourism-dependent economies.

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## CHINA

China has set its GDP growth target for 2014 at 7.5%, the same as for 2013.

Despite a slower growth rate than in previous years, the China construction market is still expected to grow by over 10% every year until 2016. Such growth is the result of the country's need to increase housing supply, as well as the development of infrastructure networks for fostering large-scale urbanisation.

The Central-East region, home to about one-third of the country's total population and economic output, supports the largest regional construction market and will account for the majority of total construction spending in China. Construction expenditures in the Northwest region are expected to enjoy the fastest growth, benefiting from the government's 'Great Western Development' strategy and rising personal incomes, which will result in relatively stronger increases in construction spending on infrastructure and manufacturing facilities and housing.

China's red-hot property market, while still strong, is expected to become moderate in 2014. Because of stringent measures taken in 2011-12 and the burst of pent-up demand in 2013, home sales and home prices grew at their fastest pace in 2013 since 2009. The previous government led by the former Premier Wen Jiabao imposed tightening measures right before he left office in March 2013. The new government however decided not to implement those measures, and thus partially contributing to the release of pent-up demand.



China's leaders have been walking a fine line regarding the real estate market. While rapid price growth is putting home ownership farther out of reach for most Chinese and fuelling social discontent, the government is reluctant to cool down the market too dramatically. The property sector accounts for about 15% of GDP, and heavily indebted local governments rely on land sales to fund costly infrastructure projects.

National new home sales in GFA surged 20.5% year-over-year in the first 11 months of 2013. The national average sale prices (ASP) of new homes rose by 9.3% during the same period.

In 2013, the home prices in Tier-1 cities like Beijing and Shanghai surged by 23% year-over-year. In lower tier cities such as Wenzhou, the home prices were even dwindling. For 2014, the home prices in Tier-1 cities will be rising faster than the national average and Tier-3/4 cities will still fall behind.

The introduction of the two-child policy and rural land reforms are likely to boost housing demand. It is expected to increase the annual housing demand by around 62 million square metres.

Inflation-adjusted non-residential building construction expenditures are forecast to post the best annual gains through 2017. Strong advances in industrial building construction will lead growth. The manufacturing sector in China will continue to expand quickly, benefiting from robust increases in consumer spending for manufactured goods, accommodative government policies, and foreign direct investment.

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The introduction of the two-child policy and rural land reforms are likely to boost housing demand.

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## HONG KONG

Hong Kong's overall economic performance improved in 2013, with real GDP expanding moderately by 2.9%. For 2014, the economy is forecast to grow by 3-4%. For 2013 as a whole, the total gross value of construction works performed by main contractors amounted to HK\$174.9 billion, an increase of 9% in nominal terms compared with 2012.

The gross value of construction works performed at private sector sites totalled HK\$49.4 billion in 2013, whilst the gross value of construction works performed in public sector totalled HK\$62 billion. The construction costs in Hong Kong are expected to rise sharply over the next two to three years because of an increase in infrastructure and residential development and a shortage of labour resources.

Higher wages, a result of construction labour shortage, are another factor driving construction costs higher. The number of skilled workers in the industry remained unchanged at around 100,000 last year. However this number still falls short of number needed to fulfil the workload.

With the booming construction market in Hong Kong already awash with large-scale construction projects, it would be reasonable to assume there would be a natural decrease in the level of construction activity before long. However there seems to be very little evidence of things having any chance of slowing down anytime soon.

The HKSAR Government has a housing target of 470,000 units over the next decade, with public housing accounting for 60%. A number of measures will be taken by the government, such as over 150 sites will have to be rezoned for residential use and made available over the next five years, to increase the development density of the existing residential areas, to develop Pok Fu Lam and Hung Shui Kiu, etc.

All in all, with a steady influx of new construction projects in Hong Kong, the market will remain very active in the coming two to three years.

## SINGAPORE

Riding on the improved global macro-economic conditions, the Singapore economy in 2013 grew by 3.9%, from 2.5% in 2012. Growth was mainly attributed to the strong expansion in the service producing industries, which grew by 5.3% in 2013 from 2.8% in 2012. For 2014, the Ministry of Trade and Industry (MTI) expects externally-oriented sectors to continue to recover and provide support to growth, in tandem with the recovery in global demand. However, tight labour conditions are expected to weigh on growth in labour-intensive domestically-oriented sectors. MTI projects the Singapore economy to grow by 2% to 4% in 2014.

The property market has felt the effects of the several rounds of cooling measures and property valuations started to slide in the last quarter of 2013. The decline in prices has affected many in the real estate industry and developers have called for a relaxation of the cooling measures imposed to date. However, the government expressed during the Singapore 2014 Budget debate that it is too early to do so given the run-up in prices over the last four years. The government will continue to monitor the property market and adjust the measures when necessary.

The construction sector experienced a moderation in expansion, growing by 6.1% in 2013 down from 8.6% in 2012 due to a slowdown in both private and public construction activities. Based on preliminary estimates by the Building and Construction Authority (BCA), construction demand in 2013 reached a total of S\$35.8 billion, higher than the S\$30.8 billion recorded in 2012. For year 2014, BCA forecast construction demand to be between S\$31 and S\$38 billion. Private sector construction demand in 2014 is projected to decline to between S\$12 and S\$16 billion, a significant fall from the S\$21 billion recorded in 2013. Public sector project construction demand for 2014, on the other hand, is forecast to reach S\$19 to S\$22 billion, up from S\$14.8 billion in 2013.



Construction costs for 2013 continued to experience upward pressures from the impact of regulatory changes. These include the higher buildability and constructability scores, the balcony bonus GFA scheme, reduction in Man-Year Entitlement allocations, increased foreign worker levies and general resource shortage. As a result of the difficulty in labour resourcing, contractors have generally become more selective in the participation of tenders. For 2014, construction costs are expected to rise following the government's introduction of further regulations to improve construction productivity. Barring any unforeseen change in market conditions, we anticipate construction cost escalation for 2014 to be in the order of 4% to 6% given the present market conditions.



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However, what is most encouraging for 2014 is that optimism is spreading beyond housing. Overall, construction is expected to grow 4.3% per annum between now and 2025 across a number of sectors.

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## UNITED KINGDOM

Despite the continued effects of the recession, 2013-14 was a successful period for Rider Levett Bucknall UK. Work has been secured in two core areas: opportunities overseas by supporting our existing customers and supply chain; and an increase in renovation and maintenance works to replace the reduction in new-build in the UK.

On the international front, we have worked more closely with our European partners via the RLB Euro Alliance, delivering projects in Germany, Turkey and Scandinavia in the last 12 months.

The Euro Alliance comprises 30 countries, enabling us to deliver services utilising local knowledge and expertise, and has helped us to develop a pan-European understanding of construction costs which we have used as the springboard for European Construction Costs – a subscription-based product which enables users to compare costs of 100 building types throughout the region and build bespoke cost models (see 2013-14 highlights for more detail).

The new partnership with South African quantity surveying firm Pentad, has led to work in Johannesburg and Mozambique, in the first three months of the agreement.

Likewise, we have utilised existing offices and increased our activity in the Middle East and Caribbean, whilst helping our global colleagues to deliver projects in the UK on behalf of international investors.

On the UK construction side, we have worked closely with investors and asset owners who see the potential in repurposing existing stock, managing it better and creating greater efficiencies, both in the building fabric and in its use.

In particular, we have seen a big increase in the public sector – delivering strategic estate rationalisation projects and utilising a Government Soft Landings approach to ensure that design and construction is fully allied with the client's ultimate goals and operational requirements.

Opportunities also exist due to the mandate that all centrally procured government contracts will require Building Information Modelling (BIM) from 2016, and the QS is in an enviable position as experts in construction costs.

This combination of expanding our overseas offering and focusing on key sectors in the UK has left us well placed to continue to grow our business and benefit from the slowly returning optimism in the market.

Positive signs are in place for further growth in the next year. The publication of the Government Construction Strategy 2025 demonstrated the importance the sector has in terms of the overall economic health of the UK, and to that end the sector has profited from the added focus.

In particular, housing benefited from a number of Government interventions in 2013, including the Help to Buy scheme, which made it easier for first-time buyers to obtain a mortgage and removed some of the risks for house builders and mortgage providers.

However, what is most encouraging for 2014 is that optimism (and most importantly workload) is spreading beyond housing. Overall, construction is expected to grow 4.3% per annum between now and 2025 across a number of sectors.

This includes the commercial sector, which is now picking up after a relatively static period. There was 5% more work in the final quarter of 2013 than in 2012. Non-housing repair and maintenance work is delivering almost the same level of growth, and infrastructure provided almost 3% more work in 2013 than in 2012.

Away from the private sector, the government has also earmarked £1 billion for various infrastructure works throughout the UK. These include repairs and improvements to the road network, a £270 million guarantee for the Mersey Gateway bridge and £140 million for flood defences.





## EUROPE

Forecasters expect construction in Europe to recover throughout 2014 after six years of either decline or minimal growth.

The forecasting network Euroconstruct has predicted 0.9% construction growth this year across its 19 participating countries with annual growth of 1.8% and 2.2% to follow. Although this is positive, we should expect to see upward price pressures on the building tender prices and costs as various countries move out of recession.

The forecast adds that the recovery will take time to gather pace and it isn't until 2016 that construction activity is expected to be rising in all 19 countries.

Northern Europe shows the greatest levels of growth with Scandinavia leading the way in part due to the healthy activity in the oil industry and a large number of infrastructure projects, including major roads projects. Norway and Sweden are predicting growth of over 3.5% in contrast to Spain and Portugal who are forecast to see further contraction.

Eastern Europe is mixed. The cost of development in Russia is high, with shopping centres and hotels in particular costing more per square metre than other European cities. The market is extremely competitive because there is sufficient work around, making it difficult to negotiate significant discounts.

On the opposite side of the scale, countries such as Hungary are experiencing far slower levels of growth in a much more volatile marketplace. However, there is evidence the country is in recovery mode; the market has seen a slight increase in costs of between 2-3% over the last twelve months, which is an improvement from the previous year. Material prices are gradually increasing, in particular imported materials. Most materials are locally sourced with only specialist and sophisticated materials being imported. Labour conditions in the country are stable; a projected upturn in the construction industry will help reduce unemployment.

Norway and Sweden are predicting growth of over 3.5% in contrast to Spain and Portugal who are forecast to see further contraction.

A lack of manpower and resource is impacting heavily in Germany, which has seen the cross-section of contractors change from a market comprising many bigger general contractors towards a market of many smaller companies specialised in their field. Fewer projects are constructed under a general contractor agreement and single package tendering to smaller companies with a high amount of subcontractors is becoming more common.

Despite these difficulties Germany remains one of the leading economies, growing more in comparison to other countries in the central Europe region with infrastructure and residential projects fuelling this growth. For example, in Berlin high quality developments are being delivered at lower cost when compared with other leading markets, such as London, Paris and Moscow, making it increasingly attractive to investors.

Meanwhile, construction in southern Europe however remains pretty much in recession with countries like France, Italy, Portugal and Spain expected to see activity falling this year.



## MIDDLE EAST

The Middle East continues to provide a diverse range of opportunities and challenges across the region. The sustained growth of the Gulf Cooperation Council (GCC) countries contrasts greatly with the continued economic and political challenges among most other major markets in the region. The Kingdom of Saudi Arabia (KSA), United Arab Emirates (UAE), Qatar and Oman have been transformed by significant investment across all sectors particularly in Infrastructure and public works. Dubai continues to be a highly attractive market in the region for investors compared to the instability of other major countries such as Egypt, Syria and Iraq.

The regional construction and development market remains dominated by KSA, UAE, Qatar and Oman, as these hydrocarbon rich states continue to reinvest their significant wealth into their local economies and across the region.

Although the global economic crisis in 2008 caused a harsh decline in all sectors of the economy, and while many countries struggled with internal challenges and changes marked by the Arab Spring and its aftermath, the regional construction sector has returned to growth with \$71 billion of contract awards made in 2013, a level not seen since 2008.

According to the Bruce Shaw Knowledge Centre publication, the current value of five projects in the region, excluding schemes that have been postponed or delayed, is \$1.3 trillion, with \$935 billion in execution, \$83 billion out to tender, \$162 billion in design phases and \$110 billion under study.

Within the GCC countries particularly, the aim to promote a wider diversification in the economy and reach a balanced and sustainable development, has started to shift its focus to the medical, residential and hospitality sectors, which registered the biggest growth in 2013-2014 and count for over half of the construction and development market. These sectors are followed closely by continued investment in the commercial, educational, and retail sectors.

Highlighted within the 2014 Global Infrastructure Investment Index (GIII), the UAE and Qatar are highly ranked among the world's 40 most dynamic countries with greatest potential for growth and investment in infrastructure.

With the award of the 2022 FIFA World Cup to Qatar and the 2020 World Expo to Dubai, there is great optimism that will bring multi-billion dollar investment opportunities to the region.

The outlook for the Middle East region's construction sector is one of continued optimism within selected markets. The main focus of the region, particularly the GCC states, is the continued diversification of the economy. Rider Levett Bucknall maintains its commitment to the Middle East region with continued growth in the business across all locations and a positive outlook into 2015 and beyond.

## UNITED ARAB EMIRATES

The UAE economy has continued to strengthen over 2013 and into 2014 with the IMF predicting growth in GDP in excess of 4.5% for the coming year. This is generally driven by the increase in global oil prices and the continued growth in Dubai tourism. Investment in the UAE market continues to grow outside of the hydrocarbon sector as investors look for the relative 'safe haven' the UAE offers in comparison to other economies in the region.



Significant uplift in the Dubai real estate market has driven up confidence. According to the information published by the Dubai Land Department (DLD), the total amount of real estate transactions recorded in Dubai for the first quarter of 2014 exceeded AED 61 billion in property deals – an increase of 38% over the same period last year of AED 44 billion. Some concerns have been raised of the potential for a new 'bubble' increasing the risk of another downturn. However, the award of Expo 2020 and the continued increase in tourism enables an overall positive outlook for the construction and development market.

Continuing its plans to become an international investment hub, the UAE has re-launched many projects that were put on hold during the economic crisis in 2008 and has pushed forward major infrastructure and residential/non-residential projects. The construction industry of UAE is expected to double its contract awards in 2015, especially with the disclosure of some of the preparations for the city's hosting of Expo 2020. The awarding of the event to Dubai has already raised confidence and the Dubai authorities, and local Developers, have announced a number of new projects to a rapidly increasing pipeline.

**QATAR**

Qatar continues to experience year on year growth with the IMF predicting over 5.2% growth in GDP for 2014. This continued growth maintains Qatar's position as a market of significant potential and opportunity. Income from the hydrocarbon sector remains dominant however the Qatar authorities have shown a strong willingness to diversify the economy to provide longer-term stability. The 2030 vision remains on course as population figures continue to rise and a range of major projects are released to the market.

With the continued rise in project awards and increase in the expatriate population, concerns continue to develop regarding the increase in inflation. Availability of housing and construction resources remains under constant pressure as the market begins to deal with the significant increase in demand. The local Authorities are actively addressing these issues in an attempt to restrain inflation. Construction costs are expected to rise steadily over the short term with the longer-term outlook uncertain, but likely to involve significant price increases, due to the huge pipeline of planned projects.

With Qatar's 2030 vision, the number and sizes of projects currently planned or underway is staggering. The Qatari Government is investing heavily in capital and infrastructure developments as their 2030 strategy continues its push towards positioning Qatar as 'a world class hub with deep cultural roots', further placing the country on the world map.

Ashghal (Public Works Authority), Qatar Rail and the Supreme Committee for the 2022 FIFA World Cup have released a number of major projects, which has spurred growth particularly in the infrastructure and public works sectors. Retail, health and education are sectors also heavily in development with a number of opportunities for international companies to pursue.

**KINGDOM OF SAUDI ARABIA**

The Kingdom of Saudi Arabia (KSA) economy has shown strong economic performance in 2013-2014 as its significant hydrocarbon based income continues to shield it from the instability in the surrounding region. The IMF has predicted GDP growth of around 4% for 2014 with increasingly strong investment by the KSA Government in all major sectors of the economy.

The Government of KSA aims to shift the country from dominant hydrocarbon based economy to one more reliant on manufacturing and services. According to the BTI 2014 published report, education and healthcare sectors have risen noticeably in the past couple of years and remain the priority, accounting for a quarter of the national budget in recent years and reaching close to 10% of GDP. KSA has plans to develop significant religious tourism and is investing heavily in major infrastructure projects.

The build up of significant reserves from its hydrocarbon income has enabled local authorities to carry out its investment plans with a significant buffer from any major outside economic impacts. KSA has prioritised an increase in employment opportunities for its nationals, an increase in the availability of quality housing and the provision of world-class education. A strong commitment to economic reform and job creation provides a stable basis for continued confidence in the KSA market.

In addition to significant Government spending, an increasingly active private sector within KSA offers further reason for confidence in the continued growth of the construction and development market. This offers a number of opportunities for local and international firms.

**OMAN**

The Oman economy has registered impressively consistent growth over the past few years with the IMF predicting an increase in GDP of 3.4% for 2014. This growth is enabled by further income from the hydrocarbon sector along with a significant increase in economic input from non-hydrocarbon sectors – particularly tourism. The Government of Oman continues its policy of maintaining openness to outside investment and trade.

Increases in oil outputs from the utilisation of enhanced recovery methods added to the development of the Khazzan gas fields continues to fuel optimism in the economic outlook for Oman. Investment in infrastructure – such as the airport and the planned rail network – continues to contribute significantly to the construction and development market.

Relatively to its size and population, the construction industry in Oman remains strong with a number of planned projects to be implemented in the short term. Public sectors remain the largest beneficiaries of the Government investment with significant spending planned on education and transportation.

Continued Government support in 2014, is expected to assist the construction and development market to achieve an increase in contracts awarded. Growth in economic diversity, and a continued increase in tourism investment, enables confidence in the Oman markets ability to provide a number of opportunities into the future.





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Engineering construction was the key winner in the surge in mining investment over the past 10 years. This means that it will also be the area where the largest contraction in activity will occur.

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## AUSTRALIA

There were no interest rate surprises from the Reserve Bank of Australia (RBA) at their last meeting in April 2014. The decision to leave the cash rate unchanged at 2.5% was universally expected by most analysts.

The RBA highlighted in their meeting statement that:

- They forecast a modest pick-up in global growth this year.
- There are indicators that the domestic growth transition needed to offset the downturn in mining capital expenditure has commenced.
- Continued expansion in housing construction is underway, consumer demand is strong, exports are rising and general business confidence has improved.
- Inflation rates are expected to be consistent with the 2-3% pa inflation target over the medium term.

Even though the RBA is confident in the current state of the Australian economy there remains potential forces, which could undermine the current equilibrium.

- The exchange rate remains at an elevated level, which could adversely affect the rising non-mining export trend.
- There has been growing speculation about Chinese debt and its 'shadow' banking system, which has prompted several analysts to downgrade their Chinese outlook over the next couple of years, which could affect investment in Australia and domestic demand for raw materials with a tightening of bank lending.
- Rapidly rising house prices threaten to compromise the bank's desire for low interest rates by adding pressure on short-term rate increases to cool down the heat in the housing market.

Engineering construction was the key winner in the surge in mining investment over the past 10 years. This means that it will also be the area where the largest contraction in activity will occur. Because of the long tail of mining-related work that exists in the pipeline, engineering construction activity will decrease over the next few years, but it will not collapse. Currently the engineering construction pipeline is dominated by large multi-year LNG projects. The majority of these mega-LNG projects will be completed in 2015. The completion of these projects will see engineering construction slow significantly over the latter part of 2015 and into 2016. Both Western Australia (WA) and Queensland (Qld) have seen extensive engineering construction because of their high exposure to resource investment. Almost 70% of all engineering construction work done was in both WA and Qld. WA engineering construction is trending down faster than construction in Qld as iron ore projects reach completion.

Current activity in non-mining engineering is low. But the pipeline of work yet to be done remains significant as these projects are also multi-year projects. Activity in the future will be concentrated in the transport activity sector. The Federal Government has indicated the focus will be on infrastructure spending, having allocated an additional \$4.7 billion of public money to infrastructure projects over the next four years, with the majority of this money going to major road projects.

Building approvals in the non-engineering sectors are showing trends of growth over most of the country. Total Australian building approvals in 2013 increased \$11.1 billion from 2011 levels, some 19%. Total approvals for 2013 highlight that the Apartment, Office and Retail & Wholesale sectors have increasing levels of approvals over the past two years. Apartment approvals have grown \$4.6 billion since 2011, Office approvals by \$3.1 billion and Retail & Wholesale by \$1.8 billion. Residential houses have increased only \$1.3 billion in the same time period.

Construction work done has increased 12% from 2011 levels and 32% from 2009 seasonally adjusted. These increases are mainly due to the Engineering sector where work done has increased from an annual value of \$78 billion in 2009 to \$127 billion in 2013. Building work has decreased from \$83 billion in 2009 to \$80 billion in 2013, mainly due to the BER and associated Federal Government stimulus packages delivered during the GFC period.

Construction costs around Australia are rising albeit lower than inflation. Continued pressure on cost rises is being seen in all offices where the market is competitive and contractors are focused on continuity of work. This 'pipeline build' is being transmitted to sub-contractors and suppliers, ensuring that inventory levels are maintained and work forces are available. Australian RLB offices are predicting construction cost increases of between 1.5% and 4% for 2014.

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Building approvals in the non-engineering sectors are showing trends of growth over most of the country.

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Whilst remaining volatile, building activity is seeing a strong and positive upturn.

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## NEW ZEALAND

The New Zealand economy is in good stead. Economic growth in 2014 will be the best in seven years. There will be boosts from surging Canterbury reconstruction and a rebound in farming from the 2013 summer drought. The recovery is also broadening across sectors and regions. Households, rather than businesses, have driven much of the recovery.

The economy continues to grow with strong economic recovery in Christchurch and Auckland. GDP is forecast to increase by 3% in 2014 with the re-build of Christchurch contributing one-third of this growth. Growth in other regions is occurring, albeit at a slow pace with building seismic strengthening work helping to underpin construction activity in the regional centres. The Reserve Bank recently raised interest rates by 0.25% to cool forecast inflation pressures. The New Zealand dollar also remains comparatively high and this interest rate rise will help to sustain this.

Households are becoming more confident, and they are spending, borrowing and investing more. Some of this spending is funded from debt. A clampdown on highly geared borrowing by the RBNZ may slow things, but not in earnest until 2014.

Whilst remaining volatile, building activity is seeing a strong and positive upturn. Both residential and non-residential sectors are expected to continue to improve, influenced heavily by the turnaround in investment activity.

The recovery in non-residential building activity has been carried by Canterbury thus far, although other regions are now following suit.

Non-residential building consents have risen over the past year, but the growth has been uneven across sectors. Some large one-off projects, such as a new prison in Auckland, had a big impact. Other public sector work in health and education is patchier now, compared to very strong growth during the recession. There is still growth in the education sector work, but health sector work has peaked.

In the private sector, there is growth in storage and in farm building, but there is little growth in other segments. As the economy recovers, there will be broadening demand across sectors.

Secular growth in logistics will support storage and industrial building, particularly in metropolitan areas. Residential activity is also very healthy at the moment with Canterbury leading the charge once again.

Construction cost inflation will increase, driven largely by labour costs in the first instance. There are signs of broader pressures in construction costs. These pressures will increase over the forecast horizon as the pace of building work accelerates.

To date, the increases in activity and pricing pressures have been concentrated in Canterbury. But the economic and construction recovery is broadening to other regions and prices pressure will also follow.



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