

Major international law firms in Singapore

Singapore has been attracting significant attention from international law firms in Asia recently. SSQ has analysed the latest Singapore Legal Services Regulatory Authority (LSRA) data from the major US/UK-headquartered international law firms' perspective. Hopefully this information will assist our clients, as well as the international legal community in general, to better assess whether and how to establish a Singapore presence, as well as how to maintain and grow any existing operations.

An overview of the law firms and lawyers in Singapore

According to the LSRA's record, there are currently 1,152* active law firms and 7,429* lawyers registered in Singapore. Following the local rules governing the legal profession and the practice of law in Singapore (the Legal Profession Act, or LPA) we categorise these as follows:

Types of Law Practices (Abbreviations)	Number of Firms	Size of firms*	Areas of Practice Allowed
Singapore Law Practice (SLP)	996	24	Large
		164	Medium
		808	Small
Foreign Law Practice (FLP)	138	8	Large
		40	Medium
		90	Small
Qualifying Foreign Law Practice (QFLP)	9	8	Large
		1	Medium
		0	Small
Joint Law Venture (JLV)	9	5	Large
		4	Medium
		0	Small
In total	1,152	45	Large
		209	Medium
		898	Small
Formal Law Alliance (FLA)	9		SLP and FLP/QFLP remain distinct entities, practicing what they are respectively allowed to practice
Representative Office (RO)	13		Liaison or promotional work only - not allowed to practice law or conduct any business activities in Singapore
Group Practice (GP)	8		A grouping of law practices, member law practices remain distinct entities practicing what they are respectively allowed to practice

*1,152 and 7,429 are figures collected from LSRA in early May 2023. Due to the frequent changes and updates, these numbers may vary.

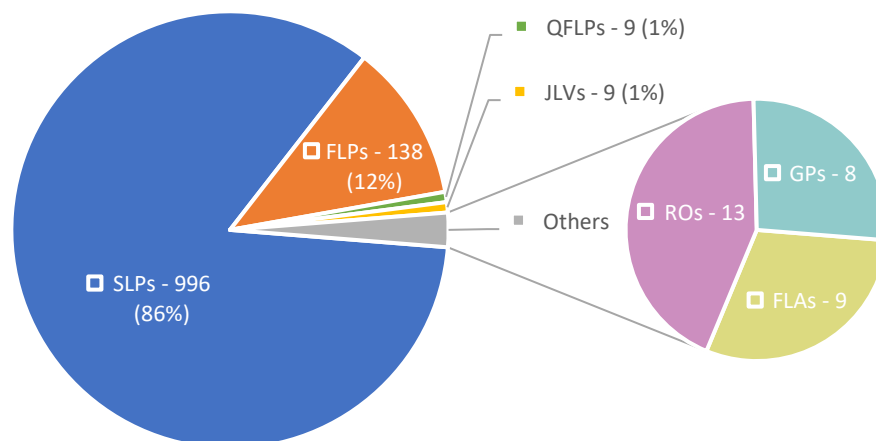
*The categorisation of law firms into “Large”, “Medium” and “Small” refer to firms with (a) 1 to 5 lawyers, (b) 6 to 30 lawyers and (c) 31 or more lawyers, respectively.

*The “permitted areas of legal practice” in Singapore include banking law, corporate law, intellectual property law and maritime law but exclude domestic areas of litigation and general practice such as criminal law, family law, retail conveyancing and constitutional law.

The majority of law firms in Singapore are SLP or FLP, which, in total, accounts for 98% (1,134 out of 1,152). The other two standalone law firm entities, QFLP and JLV, are just 18 combined in number (9 for each) which represents only 2% of the market.

Furthermore, SLPs are the dominant players in the market, representing 86% of all firms (996), while FLPs share only 12% (138). There are a further 3 types of law practice in Singapore: FLA, RO and GP – but they are not recognized as standalone law firm entities and therefore cannot practice law on their own.

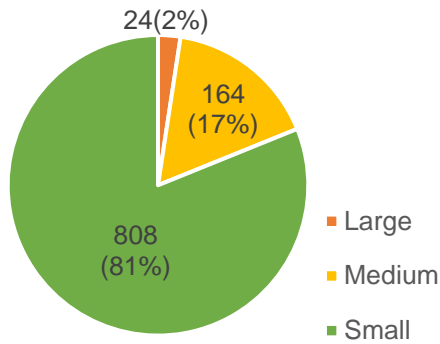
Shares of different types of law practices in Singapore



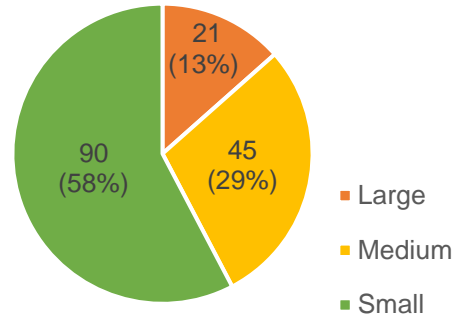
Only 45 of these 1,152 are large firms (more than 30 lawyers), less than 4%. These 45 firms include 24 SLPs, 8 FLPs, 8 QFLPs and 5 JLVs. It is interesting to note that there is a much larger percentage of foreign law firms (namely, FLPs, QFLPs and JLVs) being large or medium-sized than that of SLPs.

100% of QFLPs and JLVs are large/medium-sized and the large/medium-sized FLP/QFLP/JLV firms account for 42% (21+45 of 156), while SLPs of large/medium size account for only 19% (24+164 of 996) and over 80% SLPs (808 of 996) are small sized - either sole proprietorships or firms of less than 5 lawyers.

Shares of different-sized SLPs



Shares of different-sized foreign law firms

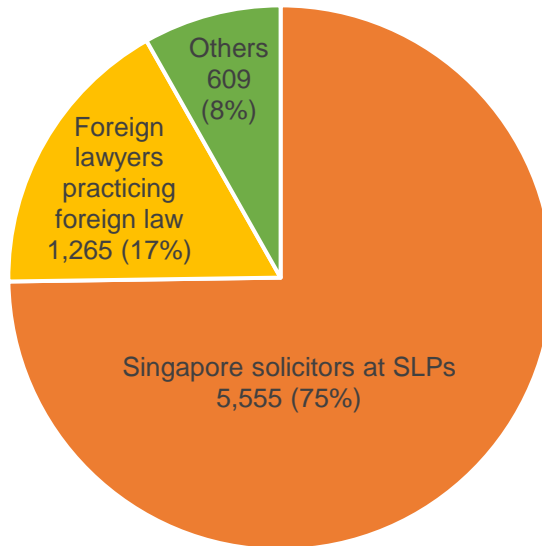


The current 7,429 lawyers in Singapore, according to their types or certificates registered under the LPA, are categorized as follows:

Lawyer Type	Number of Lawyers		Registration Type	Description	Types of Law Permitted to Practice
Singapore solicitor	6,113	5,555	Singapore Practicing Certificate	A Singapore solicitor practicing Singapore law (and/or foreign law) in a SLP	Singapore law; and/or foreign law
		558	LPA – 36E	A Singapore solicitor practicing Singapore law (and/or foreign law) in a FLP, QFLP or JLV	Foreign law; and/or Singapore law in the “permitted areas of legal practice”
Foreign lawyer	1,316	40	LPA – 36B	A foreign lawyer practicing Singapore law and/or foreign law in any licensed law practice (but Foreign Practitioner Examinations required)	Foreign law; and/or Singapore law in the “permitted areas of legal practice”
		1,265	LPA – 36C	A foreign lawyer practicing foreign law in any licensed law practice	Foreign law
		11	LPA – 36D	A foreign lawyer who does not practice in Singapore but is registered as a director, partner or shareholder in a SLP	None

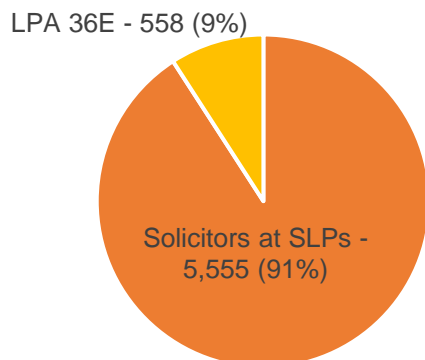
Like the pattern of law firm types above, where most are either purely local SLPs or purely foreign FLPs, the majority of lawyers in Singapore are either Singapore solicitors working at SLPs, the number of which is about 5,555, representing 75% of the whole market; or foreign lawyers who practice foreign law only, the number of which is 1,265, representing 17% of the market.

Ratio of Singapore and foreign lawyers

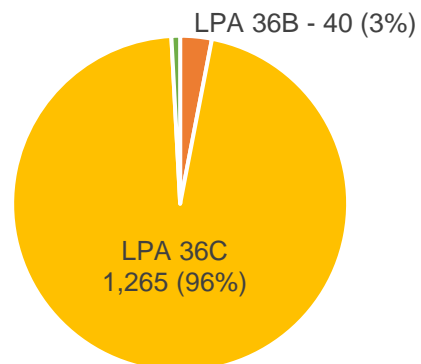


Approximately 9% of Singapore solicitors (558 out of 6,113) are registered to practice local law but through foreign law firms (namely, FLPs, QFLPs and JLVs). Obviously, many in this group made such a choice because of the stronger network and capabilities the FLPs, QFLPs and JLVs possess when compared to the SLPs. In addition, approximately 3% of foreign lawyers (40 out of 1,316) have successfully qualified to practice local Singapore law. 18 of these work at SLPs while 12, 5 and 5 work at FLPs, QFLPs and JLVs, respectively.

Ratio of Singapore Solicitors



Ratio of foreign Lawyers



Major international law firm operating structures and sizes

From SSQ's latest research, we understand there to be 57 US/UK-headquartered, major international law firms already operating in Singapore. Their Singapore offices vary in size and are made up of various legal structures including SLP, FLP, QFLP, JLV or RO.

Types of Law Practices	Number of firms	Size of firms (number)	Firm Name
FLP	33	Large (8)	FRESHFIELDS BRUCKHAUS DERINGER SINGAPORE PTE LTD
			HERBERT SMITH FREEHILLS LLP
			HOLMAN FENWICK WILLAN SINGAPORE LLP
			KING & SPALDING (SINGAPORE) LLP
			LAWYERS ON DEMAND (SINGAPORE) PTE. LTD.
			REED SMITH PTE LTD
			STEPHENSON HARWOOD LLP
			WATSON FARLEY & WILLIAMS LLP
		Medium (21)	ADDLESHAW GODDARD LLP
			AKIN GUMP STRAUSS HAUER & FELD LLP
			ASHURST LLP
			BAKER BOTTS (SINGAPORE) LLP
			BRYAN CAVE LEIGHTON PAISNER LLP
			CMS CAMERON MCKENNA NABARRO OLSWANG (SINGAPORE) LLP
			COOLEY SG LLP
			DAC BEACHCROFT LLP
			DECHERT (SINGAPORE) PTE. LTD.
			DLA PIPER SINGAPORE PTE LTD
			GOODWIN PROCTER (SINGAPORE) LLP
			GREENBERG TRAURIG SINGAPORE LLP
			GUNDERSON DETTMER SINGAPORE LLP
			HILL DICKINSON LLP
			MCDERMOTT WILL & EMERY SINGAPORE LLP
			MILBANK LLP
			MISHCON DE REYA LLP (SINGAPORE BRANCH)
			MORRISON & FOERSTER (SINGAPORE) LLP
			SHEARMAN & STERLING LLP
			SKADDEN, ARPS, SLATE, MEAGHER & FLOM (SINGAPORE) LLP
			SQUIRE PATTON BOGGS SINGAPORE LLP
		Small (4)	LITTLER ASIA LLP
			O'MELVENY & MYERS LLP
			ORRICK, HERRINGTON & SUTCLIFFE (SINGAPORE) PTE. LTD.
			PENNINGTONS MANCHES COOPER SINGAPORE LLP
QFLP	9	Large (8)	ALLEN & OVERY LLP
			CLIFFORD CHANCE PTE LTD
			GIBSON, DUNN & CRUTCHER LLP

			LATHAM & WATKINS LLP
			LINKLATERS SINGAPORE PTE LTD
			NORTON ROSE FULBRIGHT (ASIA) LLP
			SIDLEY AUSTIN LLP
			WHITE & CASE PTE LTD
		Medium (1)	JONES DAY
JLV	9	Large (5)	BAKER & MCKENZIE.WONG & LEOW
			CLYDE & CO CLASIS SINGAPORE PTE LTD
			HOGAN LOVELLS LEE & LEE
			MAYER BROWN PK WONG & NAIR PTE. LTD.
			PINSENT MASONS MPILLAY LLP
		Medium (4)	DUANE MORRIS & SELVAM LLP
			KENNEDYS LEGAL SOLUTIONS PTE LTD
			RPC PREMIER LAW PTE LTD
			SIMMONS & SIMMONS JWS PTE. LTD.
SLP	5	Large (5)	BIRD & BIRD ATMD LLP
			DENTONS RODYK & DAVIDSON LLP
			K&L GATES STRAITS LAW LLC
			MORGAN LEWIS STAMFORD LLC
			WITHERS KHATTARWONG LLP
RO	1		NIXON PEABODY LLP (SINGAPORE REPRESENTATIVE OFFICE)
In total	57		

The majority of these major US/UK firms (58%, so 33 out of 57) take the structure of FLP in Singapore. FLP is the easiest to set up and provides opportunities for further growth via conversion to more local structures such as QFLP, JLV or FLA. However, under FLP, the practice area is limited to foreign law which may not meet all law firms' business needs, especially for those whose practice often requires local advice. For those firms who focus their business on cross-border matters, happy to just work on offshore law, the FLP structure is more sustainable.

To achieve other more local structures such as QFLP, JLV, FLA or shareholding in an SLP, the foreign law firm (and the local co-operation firm if required by regulations) usually needs to meet some basic threshold requirements including team size, ratio between local and foreign lawyers, history with foreign and local firms. One guiding principle is that the foreign interest should never exceed one third. In addition, the QFLP route has been suspended for a few years by the local authority, and there are no details yet regarding when it will be re-opened for new applications.

26 of these 57 US/UK international law firms in Singapore are large, including 8 FLPs, 8 QFLPs, 5 JLVs and 5 shareholding/partnering in SLPs. This accounts for around 58% of all the large-sized law firms in Singapore (26 out of 45). However, each of the 'Big Four' Singapore firms (namely, Rajah & Tann, Allen & Gledhill, WongPartnership and Drew & Napier) employ 300-400 lawyers which is far more sizable than every large US/UK firm's Singapore presence, whose lawyer headcounts usually stand between 30 and 60. These 'Big Four' Singapore firms together employ more than 1,200 lawyers from a total of around 7,000 in the city-state. Therefore, in terms of size, these foreign firms are dwarfed by the local Singapore players.

In addition, 8 US/UK international law firms have formed FLAs with local SLPs:

FLA	Constituent FLP/QFLP	Constituent SLP
ASHURST ADTLAW	ASHURST LLP	ADTLAW LLC
CLIFFORD CHANCE ASIA	CLIFFORD CHANCE PTE LTD	CAVENAGH LAW LLP
CMS HOLBORN ASIA	CMS CAMERON MCKENNA NABARRO OLSWANG (SINGAPORE) LLP	HOLBORN LAW LLC
HERBERT SMITH FREEHILLS PROLEGIS	HERBERT SMITH FREEHILLS LLP	PROLEGIS LLC
NORTON ROSE FULBRIGHT ASCENDANT	NORTON ROSE FULBRIGHT (ASIA) LLP	ASCENDANT LEGAL LLC
REED SMITH RESOURCE LAW ALLIANCE	REED SMITH PTE LTD	RESOURCE LAW LLC
STEPHENSON HARWOOD (SINGAPORE) ALLIANCE	STEPHENSON HARWOOD LLP	VIRTUS LAW LLP
WFW & WTL	WATSON FARLEY & WILLIAMS LLP	WONG TAN & MOLLY LIM LLC

The major US/UK international law firms account for approximately 35% of all foreign law firms in Singapore (56 out of 161, excluding the ROs but including the 5 SLPs with foreign shareholding/partnership). The remaining 105 foreign law firms are all FLPs and operate as small/medium sized. Some of them are leading players in their home jurisdictions in Asia and Europe, including Japan, South Korea, China, India, Australia, France and Germany. Major offshore law firms have also set up their branches in Singapore. A non-exhaustive list of these leading brands in Singapore is as follows:

Country of Origin	Law Firm Name	Size of Firms
Australia	ALLENS SINGAPORE PTE LTD	Small
China/Australia	KING & WOOD MALLESONS LLP	Medium
China	HAN KUN LLP	Small
	JINGSHI LAW FIRM SINGAPORE LLP	Small
Japan	ANDERSON MORI & TOMOTSUNE (SINGAPORE) LLP	N.A
	MORI HAMADA & MATSUMOTO (SINGAPORE) LLP	Medium
	NAGASHIMA OHNO & TSUNEMATSU SINGAPORE LLP	Medium
	NISHIMURA & ASAHI (SINGAPORE) LLP	Medium
	TMI ASSOCIATES (SINGAPORE) LLP	Medium
South Korea	BAE, KIM & LEE SINGAPORE PTE. LTD.	N.A
	KIM & CHANG (SINGAPORE) PTE. LTD.	Medium
	SHIN & KIM (SINGAPORE) PTE. LTD.	Small
India	CYRIL AMARCHAND MANGALDAS (SINGAPORE) PTE. LTD.	Small
	JEROME MERCHANT & PARTNERS PTE. LTD.	Small
France	DS AVOCATS	Small
	LPA SINGAPORE PTE. LTD.	Medium
Germany	LUTHER LLP	Medium
	ROEDL & PARTNER FOREIGN LAW FIRM	Small
Offshore	CONYERS DILL & PEARMAN PTE. LTD.	Small
	HARNEY WESTWOOD & RIEGELS SINGAPORE LLP	Medium
	MAPLES AND CALDER (SINGAPORE) LLP	Medium
	WALKERS (SINGAPORE) LIMITED LIABILITY PARTNERSHIP	Medium



Having operated on the ground in Asia for over a decade, SSQ has a strong local team of consultants in our Singapore, Hong Kong and China offices working seamlessly with our colleagues around the world. Our Asia team is currently assisting with a number of international and regional law firms entering the Singapore market, including the establishment of different law practice structures and the acquisition of strategic legal talents. Please reach out to Felix Lee, Alex Harris, Shawn Chen, or your usual SSQ contact if you have any enquires or need our assistance in relation to the Singapore legal market.



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