

Global company information

Environmental consultancy survey 2010

The environmental consultancy market is becoming increasingly globalised as consultancies follow their corporate clients into new territories and also seek new opportunities to reduce reliance on their home markets.

Providing independent expert analysis and commentary, *Environment Analyst's Market Assessment* offers critical intelligence to help benchmark you firm against its peers in the global marketplace. But this study will only be as good as the input provided by consultancies themselves, which is why we would be very grateful if you or the appropriate person(s) within your organisation would complete this brief survey – providing estimates or leaving blank any questions you are unable to answer.

This questionnaire asks for the core information about your organisation that is partially published in our online Company Directory and Market Assessment report, with your permission. This information is essential to help us provide an accurate and informed view of the market and will form the basis of EA's unique analysis, including various tables of main players in each work area and client sector.

Please complete this survey – directly in Word may be easiest – and return by email to liz.t@environmentanalyst.com, by fax to 01743 818 121 or by post to Environment Analyst Survey 2010, London House, Town Walls, Shrewsbury SY1 1TX. If you require any assistance or have any queries please contact us on t: 01743 818 296 or email.

In March/April 2010, EA will be running a complementary snapshot survey looking at industry trends more generally. Please keep your eye out for this – we would be thankful of your response.

Participation benefits

Complete and return questionnaire by 12 March 2010 and receive:

- Free summary of research findings.
- Free listing in our online Company Directory, with logo.
- £100 discount voucher on products from Environment Analyst*.
- Free: your opportunity to shape our research agenda and editorial programme.

Further details at: http://environment-analyst.com/market_survey

* Offer must be taken up before 31 August 2010 and may not be used in combination with any other offers

Key global information			
Organisation			
Contact name			
Job title			
Email			
Tel no.			
Website URL			
Global head office address			
Parent company			
Primary business of your organisation <small>Please X one only</small>			
Environmental consultancy			
Management/strategy consultancy & accountancy			
Consulting engineering, planning & design			
Energy services			
Assurance, certification, risk management			
Construction services/contracting			
Other (please state)			
Ownership structure of your organisation <small>Please X</small>			
Public limited company (or subsidiary of PLC)			
Private limited company			
Private partnership, LLP or sole trader			
Employee shareholding			
Private equity or venture-capitalist shareholding			
No. of branch offices offering environmental consulting; no. of environmental consulting staff and estimate % of global turnover in each region			
	No. of branches	No. of staff	% of global turnover
West Europe (inc UK)			
East Europe/FSU			
Africa & Middle East			
Asia/Pacific			
North America			
Latin America			
Total:			100%
No. of new offices opened in 2009 (excl. by acquisition):			
Where?			

Environmental services provided by your firm or parent company globally: <small>Please X</small>		
Core environmental consultancy (as defined in Appendix)		
Compliance assurance/certification		
Environmental health services		
Environmental equipment or software		
Environmental training		
Facilities/asset management, O&M (for utilities, etc)		
Health & safety		
Laboratory		
Planning (incl transport, town & country)		
Plant design (waste, water, power, etc)		
Remediation and/or other environmental contracting		
Sustainable building design/services		
Other (please state)		
For the following, if you do not have these figures available for 2009, please estimate or use the most recent 12 month figures you have available, stating the time period here:		
Global turnover (£ or \$, please state)		
	2008	2009
Global group		
Env. services (as above)		
Environmental consultancy		
Operating profit (£ or \$, please state)		
	2008	2009
Global group		
Env. services (as above)		
Staff numbers		
	2008	2009
Global group		
Global env. services (incl consultancy)		
Global env. consultancy		
Project numbers		
	2008	2009
Global env. consultancy		
Biggest environmental consultancy contract value		
Service areas		
For the core environmental consultancy disciplines in which you are active, please estimate the proportion of your consultancy's global turnover they each contribute:		
Service areas	% of project income	
Climate change & energy		
Contaminated land		
EIA & sustainable development		
Env. due diligence, management & compliance		
Water and waste management		
Other services		
Total	100%	

Clients	
Please estimate the proportion of your consultancy's global turnover that the following client sectors each contribute:	
	% of project income
Government & regulators	
Energy & utilities (incl waste)	
Mining, manufacturing & process industries	
Infrastructure & development (incl property, transport)	
Financial, professional & service sector	
Other	
Total	100%
Please list your environmental consultancy's top ten global non-confidential clients:	
2009 key global business developments	
Please list key events in 2009 (such as mergers & acquisitions, joint ventures, restructuring, new services, etc)	
Key countries	
Please list your top 5 countries in terms of environmental consultancy project income	
	% of global income
1	
2	
3	
4	
5	
All other countries	
	100%

APPENDIX – CORE ENVIRONMENTAL CONSULTANCY SERVICES DEFINITIONS

Air quality

Includes: air quality/pollution impact assessments, best available technique (BAT) assessments, dispersion modelling, dust and odour assessments, emissions inventories, EIA support, expert witness, forecasting, health risk assessment, incident investigation, mitigation, monitoring, local air quality management (LAQM), permitting support (under the EPA part B industrial processes, IPPC, LAPC), process/end-of-pipe consultancy, regulatory compliance, risk assessments

Climate change & energy

Climate change – carbon allowance tracking, carbon due diligence, carbon footprinting, carbon management (strategy and implementation), carbon offsetting advice, carbon reduction projects (assessment & design), carbon trading, climate change mitigation, policy, risk & strategy, greenhouse gas management, emissions reduction targets [associated with: building regulations, climate change agreements (CCAs), EU/UK emissions trading schemes, pollution prevention & control regulation, etc], emissions trading strategy

Energy management – greening energy supply, energy efficiency, policy and strategy (public and private), programme management, utility resource management

Renewable energy [biomass, combined heat & power (CHP) geothermal, energy from waste, solar, wave, wind, tidal] – contract negotiation, economic policy & analysis, technical and financial feasibility analysis, investment due diligence, planning support, project management support, technology evaluation

Excludes: stand-alone oil & gas exploration consultancy

Contaminated land

Includes: desk studies; decommissioning; environmental due diligence and land transaction support; expert witness and litigation support; feasibility studies; groundwater remediation and treatment systems design; hydrogeological evaluations and modelling; incident investigations; IPPC site condition assessment; phase I environmental assessment (desk and walkover studies); phase II intrusive soil/groundwater investigations; radioactive contamination; remediation, reclamation and regeneration strategies, design and monitoring, plus on-site management and validation; regulatory authority negotiations; sustainable remediation solutions; risk assessment

Excludes: remediation contracting and geotechnical engineering

Ecological/landscape services

Includes: baseline surveys; biodiversity action plans (BAPs); consultation/negotiation with regulators and stakeholders; ecological impact assessment; expert witness; fisheries & forestry management; geographical information systems (GIS); habitat creation, restoration, management; integrated land management plans; land use surveys; landscape planning & design; nature conservation management plans; regulatory compliance; visual appraisals

Environmental assessment (EIA) & sustainable development

Includes: assistance with planning and permitting applications (IPPC, etc); baseline surveys; expert witness; feasibility studies; impact assessment (including air/water/soil quality, archeological, biological, ecological, geotechnical, heritage, hydrogeological, landscape, noise and vibration, public health, odour and dust, social/cultural, visual, wildlife); master-planning; mitigation measures (identification, evaluation and monitoring); preliminary scoping and screening; preparation/review of environmental statement (ES); project management; stakeholder communications, engagement and public consultation; strategic environmental assessment (SEA); sustainable construction; sustainability assessments, appraisals and statements

Excludes: stand-alone town & country planning

Environmental liabilities, risks and hazards

Includes: COMAH (control of major accident hazards) reports; corporate risk assessment; chemical portfolio risk analysis; crisis management and emergency planning; dispersion modelling; ecotoxicological risk assessment; environmental asset/liability assessment; environmental audits (audit protocols, audit reporting); environmental due diligence (EDD); environmental risk mapping, management and evaluation; hazard analysis (HAZAN) studies; hazard and operability (HAZOP) studies; health risk assessment; litigation support; REACH (Registration, Evaluation and Authorisation of Chemicals) compliance; site assessments, site monitoring plans; transaction support; quantitative/qualitative risk assessment

Environmental management (systems) & compliance

Includes: environmental management audits, benchmarking, compliance management; key performance indicators, preparatory review, policy development, objectives and targets, operational records and monitoring, reporting and communications; review, supply chain evaluation and training; EMS assurance/verification; legislation inventories; regulatory compliance assessments (e.g. COMAH, ELV, IPPC, packaging regulations, REACH, WEEE, WFD); resource management/audits

Environmental noise & vibration

Includes: baseline site surveys (incl. for PPC permitting); environmental noise & vibration monitoring and impact assessment; expert witness; modelling and prediction; design and specification of abatement measures; mitigation monitoring; regulatory compliance

Environmental/sustainability policy & strategy

Includes: action plans; best practice benchmarking; brand management; corporate social responsibility & environment; corporate (CSR) reporting strategy and verification; green procurement; environmental economics and cost benefit analysis; key performance indicators; market research; policy formulation and implementation; public affairs; stakeholder communications & investor relations; supply chain management; strategic positioning; sustainability appraisal/strategy; sustainable business

Waste management/recycling

Includes: best practicable environmental option (BPEO) and best value assessments; collection, disposal, recovery (recycling & composting) and treatment options; contract procurement and implementation; energy recovery (EFW); feasibility studies; hazardous, clinical and radioactive wastes; landfill (assessment, design, leachate and gas management, remediation, restoration); market development; planning and consents support (permits and licensing); regulatory compliance; stakeholder engagement; waste audits; waste minimisation; waste policy and strategy; waste science and technology evaluation and sourcing

Excludes: waste plant design

Water quality and resource management

Includes: abstraction management strategies; aquatic & marine ecology; best practicable environmental option (BPEO); catchment management; coastal processes and sediment transport monitoring/modelling; discharge monitoring/management; dispersion modelling; ecological assessment; environmental and social cost-benefit analysis of water resource / asset management plans; effluent treatment; expert witness; feasibility studies; flood risk assessment; impact assessment; incident investigation; hydraulics modelling; hydrological & hydrogeological assessments; pollution control, monitoring, mitigation and remediation; managed retreat & coastal realignment; oil spill response; process consultancy; quality analysis and toxicity testing; regulatory compliance; resource management (incl. demand and supply forecasting); riverine and coastal defences engineering design; sustainable urban drainage systems; water audits, conservation, recycling and efficiency programmes

Excludes: stand-alone network management, leakage detection, process / structural engineering, plant design

Other services

Other environmental consultancy services and technical disciplines which do not fit under any of the above headings, e.g. product stewardship, eco-design and life-cycle analysis

Environment Analyst

Environment Analyst is a publishing and business research organisation with a remit to track performance and opportunities within the environmental services sector, with a particular focus on the environmental consulting and support services market. We also publish the *Chemical Watch* information service, focusing on chemicals management and control.

Our core product is our Market Intelligence Service. In 2009, this included:

- Market Assessment of the UK Environmental Consulting Sector 2009
- Market Assessment - Executive Presentation
- Top 30 UK Environmental Consulting Companies 2009: Competitor Analysis
- Environment Analyst Market Briefing (our bi-monthly newsletter)
- Environment Analyst online news service; updated throughout the week

In collaboration with recruitment consultant Allen & York, we recently published the 2009 Environmental Professionals Career and Salary Survey. This provides the most accurate record to date of average real salaries across the environmental services industries, together with a snapshot of how the environmental industry is coping with the recession and the current state of the profession.

Our researchers and editors have been continuously analysing and reporting on the environmental services sector and policy developments since the early 1990s. The track record and expertise of our team - coupled with our unrivalled dataset on the environmental consulting market - make *Environment Analyst* the first port of call when it comes to the analysis of the sector. The team is also available for bespoke market research projects, including the compilation of tailored business news, datasets, presentations and reports, in line with your business development or investment interests.

More information is available at www.EnvironmentAnalyst.com

T: (0)1743 818 008

E: enquiries@environment-analyst.com