

UK environmental consultancy – company questionnaire 2012

Each year, with your help, *Environment Analyst* compiles the only market assessment of the UK environmental consultancy sector. This provides critical independent market intelligence to business owners, directors and investors to help their business planning and investment decisions.

We build our comprehensive picture of the market from an analysis of as many consultancies as possible, small and large. We call on a wide range of information sources and employ various checks and balances, but the data submitted on this form is critical for our research, helping us provide a more accurate and informed market view. We would be very grateful if you or the appropriate person(s) within your organisation would complete this 2012 survey – providing estimates or leaving blank any questions you cannot answer. In return, we offer **three direct benefits** (see below).

Please complete this survey – directly in Word may be easiest – and return by email to ross@environmentanalyst.com, by fax to 01743 818 121 or by post to Environment Analyst Survey 2012, 140b Longden Coleham, Shrewsbury, SY3 7DN, United Kingdom. If you require any assistance or have any queries please contact us on t: 01743 818 008 or email.

3 PARTICIPATION BENEFITS IN 2012

Complete and return this questionnaire by 31 March 2012 and receive:

- **Free listing in our online Company Directory**, with logo at: www.environment-analyst.com/directory. This questionnaire asks for the core information about your organisation that is partially freely published in the Company Directory in order to give potential clients an overview of your company's key business details.
- **Free top-line summary** of these research findings.
- **Up to 5 free job advertisements*** (worth £225) for one month on EA's recruitment web pages and weekly email, sent to almost 6,000 environmental professionals. You may pass on this benefit to your HR manager.

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

* Offer must be taken up before 31 August 2012 and may not be used in combination with any other offers

EA is also running a complementary market trends snapshot survey looking at industry trends more generally. Please keep your eye out for this – we would be thankful of your and your team's response.

Background information	UK company data	Service areas																																																																														
Organisation _____ Contact name _____ Job title _____ Email _____ Tel no. _____ Parent company _____ Do you have env. consulting offices outside of the UK? <input type="checkbox"/> Please X <i>If you have a significant global office network, please complete the supplementary global sheet (or forward to the appropriate person)</i>	<i>For the following, if you do not have figures available for 2011 (or FY 2011/12), please estimate or use the most recent 12 month figures you have available, stating the time period here:</i> <i>Latest figures apply to period:</i> _____ Staff numbers (average for the year, full time equivalents) <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>UK group</td> <td></td> <td></td> </tr> <tr> <td>UK env. services (incl. consultancy)</td> <td></td> <td></td> </tr> <tr> <td>UK environmental consultancy</td> <td></td> <td></td> </tr> </tbody> </table> Project numbers <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>UK environmental consultancy</td> <td></td> <td></td> </tr> </tbody> </table> UK turnover (£m) <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>UK group turnover £</td> <td></td> <td></td> </tr> <tr> <td>UK environmental services £</td> <td></td> <td></td> </tr> <tr> <td>UK environmental consultancy (EC) £</td> <td></td> <td></td> </tr> </tbody> </table> % of UK EC turnover derived from overseas projects _____ % Operating profit (%) <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>UK group</td> <td></td> <td></td> </tr> </tbody> </table>		2010/(11)	2011/(12)	UK group			UK env. services (incl. consultancy)			UK environmental consultancy				2010/(11)	2011/(12)	UK environmental consultancy				2010/(11)	2011/(12)	UK group turnover £			UK environmental services £			UK environmental consultancy (EC) £				2010/(11)	2011/(12)	UK group			For the core environmental consultancy disciplines in which you are active, please estimate the number of UK professional staff (full-time equivalents) skilled in these areas* and the proportion of your consultancy's UK turnover they each contribute: <table border="1"> <thead> <tr> <th>Service areas</th> <th>No. of UK staff</th> <th>% of project income</th> </tr> </thead> <tbody> <tr> <td>Air quality</td> <td></td> <td></td> </tr> <tr> <td>Climate change & energy</td> <td></td> <td></td> </tr> <tr> <td>Contaminated land/remediation</td> <td></td> <td></td> </tr> <tr> <td>Ecological/landscape services</td> <td></td> <td></td> </tr> <tr> <td>EIA & sustainable development</td> <td></td> <td></td> </tr> <tr> <td>Env. liabilities, risks & hazards</td> <td></td> <td></td> </tr> <tr> <td>Env. management & compliance</td> <td></td> <td></td> </tr> <tr> <td>Env. noise/vibration</td> <td></td> <td></td> </tr> <tr> <td>Env./sustainability policy & strategy (incl. CSR)</td> <td></td> <td></td> </tr> <tr> <td>Waste management/recycling</td> <td></td> <td></td> </tr> <tr> <td>Water quality & resource management</td> <td></td> <td></td> </tr> <tr> <td>Other services</td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td></td> <td>100%</td> </tr> </tbody> </table>	Service areas	No. of UK staff	% of project income	Air quality			Climate change & energy			Contaminated land/remediation			Ecological/landscape services			EIA & sustainable development			Env. liabilities, risks & hazards			Env. management & compliance			Env. noise/vibration			Env./sustainability policy & strategy (incl. CSR)			Waste management/recycling			Water quality & resource management			Other services			Total		100%
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Primary business of your organisation <input type="checkbox"/> Please X one only Environmental consultancy (EC) _____ Management/strategy consultancy and/or accountancy _____ Consulting engineering, planning & design _____ Energy services _____ Assurance, certification, risk management _____ Construction services/contracting _____ Other (please state) _____	Environmental services provided by your firm or parent company: <input type="checkbox"/> Please X 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) _____ Geotechnical services _____ Health & safety _____ Laboratory _____ Planning (incl transport, town & country) _____ Plant design & process engineering (waste, water, power, etc) _____ Research & development _____ Remediation and/or other environmental contracting _____ Sustainable building design/services _____ Other (please state) _____	<h3 style="background-color: #0056b3; color: white; text-align: center;">Clients</h3> Please estimate the proportion of your consultancy's UK turnover that the following client sectors each contribute: <table border="1"> <thead> <tr> <th>Client sector</th> <th>% of project income</th> </tr> </thead> <tbody> <tr> <td>Public sector</td> <td></td> </tr> <tr> <td>Central government (incl. UK/EU agencies & regulators)</td> <td></td> </tr> <tr> <td>Local government</td> <td></td> </tr> <tr> <td>Regulated industries</td> <td></td> </tr> <tr> <td>Energy - oil, gas & nuclear</td> <td></td> </tr> <tr> <td>Waste firms</td> <td></td> </tr> <tr> <td>Water utilities</td> <td></td> </tr> <tr> <td>Other private</td> <td></td> </tr> <tr> <td>Chemical & pharmaceutical</td> <td></td> </tr> <tr> <td>Construction/property</td> <td></td> </tr> <tr> <td>Financial & professional</td> <td></td> </tr> <tr> <td>Manufacturing</td> <td></td> </tr> <tr> <td>Extractive (mining, quarrying) & metals</td> <td></td> </tr> <tr> <td>Renewable energy</td> <td></td> </tr> <tr> <td>Retail & leisure</td> <td></td> </tr> <tr> <td>Technology & communications</td> <td></td> </tr> <tr> <td>Transport (airports, highways, ports, rail, shipping)</td> <td></td> </tr> <tr> <td>Other</td> <td></td> </tr> <tr> <td>Total</td> <td>100%</td> </tr> </tbody> </table> % of turnover from FTSE 350/multinational clients _____ %	Client sector	% of project income	Public sector		Central government (incl. UK/EU agencies & regulators)		Local government		Regulated industries		Energy - oil, gas & nuclear		Waste firms		Water utilities		Other private		Chemical & pharmaceutical		Construction/property		Financial & professional		Manufacturing		Extractive (mining, quarrying) & metals		Renewable energy		Retail & leisure		Technology & communications		Transport (airports, highways, ports, rail, shipping)		Other		Total	100%																																						
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Ownership structure of your organisation <input type="checkbox"/> Please X Public limited company (or subsidiary of PLC) _____ Private limited company _____ Private partnership, LLP or sole trader _____	No. of branch offices offering environmental consulting East Anglia _____ East Midlands _____ London _____ North East _____ North West _____ Northern Ireland _____ Scotland _____ South East _____ South West _____ Wales _____ West Midlands _____ Yorkshire & Humberside _____ Total _____ No. of new UK offices opened in 2011 (excl. by acquisition) _____ Where? _____	<h3 style="background-color: #0056b3; color: white; text-align: center;">Key corporate developments</h3> Please list key events in 2011/12 (such as mergers & acquisitions, joint ventures, restructuring, new services, major contract wins, etc) _____ _____ _____																																																																														

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. Our core product is our Market Intelligence Service. In 2011, this included:

- **Market Assessment of the UK Environmental Consulting Sector 2011**
- **Market Assessment - Executive Presentation**
- **Top 32 UK Environmental Consulting Companies: Competitor Analysis**
- **Environment Analyst Market Briefing (our regular topic-based briefings)**
- **Environment Analyst online news service; updated throughout the week**

We have separately issued other groundbreaking reports including:

- **Global Environmental Consulting Strategies and Competitor Analysis 2011**
- **Marine Environmental Services 2011**
- **Sustainability Careers and Salary Survey Benchmarking Report 2010**

This latter report, in collaboration with recruitment consultant Allen & York, provides the most accurate record to date of average real salaries across the environmental services industries.

Our market analysts 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:
 W: www.Environment-Analyst.com
 T: (0)1743 818 008
 E: enquiries@environment-analyst.com

APPENDIX – CORE ENVIRONMENTAL CONSULTANCY SERVICES DEFINITIONS	
<p>Air quality</p> <p>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</p>	<p>Ecological/landscape services</p> <p>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</p>
<p>Climate change & energy</p> <p>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</p> <p>Energy management – greening energy supply, energy efficiency, policy and strategy (public and private), programme management, utility resource management</p> <p>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</p> <p>Excludes: stand-alone oil & gas exploration consultancy</p>	<p>Environmental assessment (EIA) & sustainable development</p> <p>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</p> <p>Excludes: stand-alone town & country planning</p>
<p>Contaminated land</p> <p>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</p> <p>Excludes: remediation contracting and geotechnical engineering</p>	<p>Environmental liabilities, risks and hazards</p> <p>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</p>
	<p>Environmental management (systems) & compliance</p> <p>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</p>
	<p>Environmental noise & vibration</p> <p>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</p>
	<p>Environmental/sustainability policy & strategy</p> <p>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</p>
	<p>Waste management/recycling</p> <p>Includes: best practicable environmental option (BPEO) and best value assessments; collection, disposal, recovery (recycling & composting) and treatment options; contract procurement and implementation; energy recovery (Ew); 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</p> <p>Excludes: waste plant design</p>
	<p>Water quality and resource management</p> <p>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</p> <p>Excludes: stand-alone network management, leakage detection, process / structural engineering, plant design</p>
	<p>Other services</p> <p>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</p>