

Global environmental consultancy – company questionnaire 2012

Each year, the team at *Environment Analyst* researches the global environmental consultancy market, issuing a report that provides a unique insight and performance benchmarking data into those firms that operate at a global scale. Details of our current report can be found at:

<http://environment-analyst.com/global>

We are now conducting market research for the 2012 report and, if your company has significant global operations, 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 are unable to answer. *Environment Analyst's* global assessment offers critical intelligence to help benchmark your firm against its peers in the global marketplace. But this study will only be as good as the input provided by consultancies themselves, so your assistance would be greatly appreciated. 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	Global company data	Service areas																																																																																							
<p style="text-align: right;">Please X <input type="checkbox"/></p> <p>Tick here if you have also completed the UK questionnaire for your UK operations (you can leave this column blank if the background information is the same as the UK survey)</p> <p>Organisation: _____</p> <p>Contact name: _____</p> <p>Job title: _____</p> <p>Email: _____</p> <p>Tel no.: _____</p> <p>Parent company: _____</p>	<p><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></p> <p>Latest figures apply to period: _____</p> <p>Staff numbers (average for the year, full time equivalents)</p> <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>Global group</td> <td></td> <td></td> </tr> <tr> <td>Global env. services (inc. consultancy)</td> <td></td> <td></td> </tr> <tr> <td>Global environmental consultancy (EC)</td> <td></td> <td></td> </tr> </tbody> </table> <p>Project numbers</p> <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>Global env. consultancy</td> <td></td> <td></td> </tr> </tbody> </table> <p>Global turnover (£, € or \$, please state)</p> <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>Global group</td> <td></td> <td></td> </tr> <tr> <td>Global environmental services</td> <td></td> <td></td> </tr> <tr> <td>Global environmental consultancy (EC)</td> <td></td> <td></td> </tr> </tbody> </table> <p>Operating profit %</p> <table border="1"> <thead> <tr> <th></th> <th>2010/(11)</th> <th>2011/(12)</th> </tr> </thead> <tbody> <tr> <td>Global group</td> <td></td> <td></td> </tr> <tr> <td>Env. services (as above)</td> <td></td> <td></td> </tr> </tbody> </table> <p>No. of branch offices offering environmental consulting; no. of environmental consulting staff and estimate % of global turnover in each region</p> <table border="1"> <thead> <tr> <th></th> <th>No. of branches</th> <th>No. of env. consulting staff</th> <th>% of global env. consulting turnover</th> </tr> </thead> <tbody> <tr> <td>West Europe (inc UK)</td> <td></td> <td></td> <td></td> </tr> <tr> <td>East Europe/FSU</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Africa & Middle East</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Asia/Pacific</td> <td></td> <td></td> <td></td> </tr> <tr> <td>North America</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Latin America</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total:</td> <td></td> <td></td> <td>100%</td> </tr> </tbody> </table> <p>No. of new offices opened in 2011/12 (excl. by acquisition): _____</p> <p>Where? _____</p>		2010/(11)	2011/(12)	Global group			Global env. services (inc. consultancy)			Global environmental consultancy (EC)				2010/(11)	2011/(12)	Global env. consultancy				2010/(11)	2011/(12)	Global group			Global environmental services			Global environmental consultancy (EC)				2010/(11)	2011/(12)	Global group			Env. services (as above)				No. of branches	No. of env. consulting staff	% of global env. consulting turnover	West Europe (inc UK)				East Europe/FSU				Africa & Middle East				Asia/Pacific				North America				Latin America				Total:			100%	<p><i>For the core environmental consultancy disciplines in which you are active, please estimate the proportion of your consultancy's global turnover they each contribute:</i></p> <table border="1"> <thead> <tr> <th>Service areas</th> <th>% of project income</th> </tr> </thead> <tbody> <tr> <td>Climate change & energy</td> <td></td> </tr> <tr> <td>Contaminated site assessment/remediation</td> <td></td> </tr> <tr> <td>EIA & sustainable development</td> <td></td> </tr> <tr> <td>Env. due diligence, management & compliance</td> <td></td> </tr> <tr> <td>Water and waste management</td> <td></td> </tr> <tr> <td>Other services</td> <td></td> </tr> <tr> <td>Total</td> <td>100%</td> </tr> </tbody> </table>	Service areas	% of project income	Climate change & energy		Contaminated site assessment/remediation		EIA & sustainable development		Env. due diligence, management & compliance		Water and waste management		Other services		Total	100%
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<p>Core environmental consultancy (as defined in Appendix) Please X <input type="checkbox"/></p> <p>Compliance assurance/certification <input type="checkbox"/></p> <p>Environmental health services <input type="checkbox"/></p> <p>Environmental equipment or software <input type="checkbox"/></p> <p>Environmental training <input type="checkbox"/></p> <p>Facilities/asset management, O&M (for utilities, etc) <input type="checkbox"/></p> <p>Geotechnical services <input type="checkbox"/></p> <p>Health & safety <input type="checkbox"/></p> <p>Laboratory <input type="checkbox"/></p> <p>Planning (incl transport, town & country) <input type="checkbox"/></p> <p>Plant design & process engineering (waste, water, power, etc) <input type="checkbox"/></p> <p>Research & development <input type="checkbox"/></p> <p>Remediation and/or other environmental contracting <input type="checkbox"/></p> <p>Sustainable building design/services <input type="checkbox"/></p> <p>Other (please state) <input type="checkbox"/></p>	<p>Additionally, are you financed by Please X <input type="checkbox"/></p> <p>Employee shareholding <input type="checkbox"/></p> <p>Private equity or venture-capitalist shareholding <input type="checkbox"/></p>																																																																																								

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. 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