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Assistant Editor and Senior Analyst
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Director

Thanks to the environmental consulting firms that have assisted us by responding to our surveys, participating in email/phone/face-to-face interviews and verifying/commenting on their company profiles.

Great care has been taken to ensure the accuracy of the information in this edition of the report at the time of publishing; however, changes may have occurred since then. Environment Analyst cannot accept liability for errors or omissions of any kind. We are undertaking an ongoing process of verification of the content – if you do wish to pass on any updated company information or discuss any aspect of the report, please contact Environment Analyst (details above).

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1.1 Environment Analyst

Environment Analyst (EA) 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 (EC) and the associated professional & technical support services market. Our two core products are:

**Market Intelligence Service – Global**

**Market Intelligence Service – UK**

These subscription services include many reports issued throughout the year, and around 60 competitor profiles. Additionally, they include environmental services business news (global and UK channels) and Market and Company Insight articles.

For more information, please visit [www.environment-analyst.com](http://www.environment-analyst.com).

*Environment Analyst* also provides a UK-focused Development + Infrastructure service (including the *Brownfield Briefing* newsletter). We also run conferences, awards and other events in the environmental services sector. For more information, please visit [www.environment-analyst.com/dis](http://www.environment-analyst.com/dis).

1.2 Report methodology and definitions

For details about the methodology and definitions used to compile this report and others in the Global Market Intelligence Service, please download the Definitions and Methodology (Global) document from the EA website.

Our research methodology allows for continuous adjustment of market totals and market forecasts in light of the revised company performance data, economic growth projections, and policy and other announcements impacting on the fortunes of the environmental consultancy sector.

1.3 Acknowledgements

We are very grateful to the environmental consultancy firms that have assisted us by completing our surveys, participating in email/phone/face-to-face interviews and verifying/commenting on their company profiles. Our thanks go to all who have helped.

1.4 Accessing other reports and profiles in the series

Subscribers to the EA’s Global Market Intelligence Service can also download the accompanying Global Environmental Consulting Strategies & Market Assessment, Definitions & Methodology and other reports in this series separately from the download page [www.environment-analyst.com/global-mis](http://www.environment-analyst.com/global-mis).

For details of how to access, please contact Faye Heslin-Jones at ea.sales@environment-analyst.com or call (0)1743 818 008.
Advisian/Worley

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Global HQ: Level 12, 141 Walker Street, North Sydney, New South Wales 2060, Australia
Tel: +61 2 9923 6886
Fax: +61 2 9923 6877
Directors: John Grill (Chairman and Non-Executive Director), Andrew Wood (Chief Executive Officer), Adrian Smith (Group Managing Director, Advisian); Steven Whittal (Global Managing Director, Environment, Advisian)
Ownership: Listed on Australian stock exchange, Worley provides life-cycle design, engineering and project services to the resources, energy and complex process industry sectors
Founded: 1971 (as Whittan Grill and Partners)

VITAL STATISTICS*

<table>
<thead>
<tr>
<th></th>
<th>2014/15</th>
<th>2015/16</th>
<th>2016/17</th>
<th>2017/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proportion of group turnover in environmental consulting</td>
<td>3.7%</td>
<td>3.9%</td>
<td>3.8%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Turnover (gross), group*</td>
<td>US$5,533.0m</td>
<td>US$4,371.0m</td>
<td>US$3,534.0m</td>
<td>US$3,354.0m</td>
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<tr>
<td>Turnover 3 year growth, group</td>
<td>-4.3%</td>
<td>-47.2%</td>
<td>-42.6%</td>
<td>-42.6%</td>
</tr>
<tr>
<td>Turnover, environmental services (inc EC) [EA estimates]</td>
<td>US$272.3m</td>
<td>US$301.5m</td>
<td>US$230.2m</td>
<td>US$120.5m</td>
</tr>
<tr>
<td>Turnover, environmental consulting (as defined by EA)*</td>
<td>US$296.6m</td>
<td>US$187.3m</td>
<td>US$182.4m</td>
<td>US$107.6m</td>
</tr>
<tr>
<td>Turnover 3 year growth, environmental consulting</td>
<td>-28.0%</td>
<td>-61.1%</td>
<td>-61.3%</td>
<td>-61.3%</td>
</tr>
<tr>
<td>Operating profit (EBITA), group</td>
<td>US$156.7m</td>
<td>US$162.6m</td>
<td>US$167.3m</td>
<td>US$192.7m</td>
</tr>
<tr>
<td>Operating margin, group (% of gross turnover)</td>
<td>2.8%</td>
<td>3.5%</td>
<td>3.8%</td>
<td>3.8%</td>
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<tr>
<td>Staff, group</td>
<td>31,400</td>
<td>24,900</td>
<td>24,900</td>
<td>24,900</td>
</tr>
<tr>
<td>Staff, environmental services (inc EC) [EA estimates]</td>
<td>1,222</td>
<td>1,222</td>
<td>1,222</td>
<td>1,222</td>
</tr>
<tr>
<td>Staff, environmental consulting</td>
<td>1,072</td>
<td>1,072</td>
<td>1,072</td>
<td>1,072</td>
</tr>
<tr>
<td>Turnover per head, environmental services</td>
<td>US$804.6m</td>
<td>US$1,259.2m</td>
<td>US$1,259.2m</td>
<td>US$1,259.2m</td>
</tr>
<tr>
<td>Turnover per head, environmental consulting</td>
<td>US$192.7m</td>
<td>US$192.7m</td>
<td>US$192.7m</td>
<td>US$192.7m</td>
</tr>
<tr>
<td>Contracts, environmental consulting</td>
<td>98%</td>
<td>98%</td>
<td>98%</td>
<td>98%</td>
</tr>
<tr>
<td>Average contract value, environmental consulting</td>
<td>US$300k</td>
<td>US$300k</td>
<td>US$300k</td>
<td>US$300k</td>
</tr>
</tbody>
</table>

GLOBAL REVENUE BREAKDOWN

EC SERVICE AREA BREAKDOWN

SAMPLE PROFILE
Regional Analysis of EC Business

GEOGRAPHICAL FOOTPRINT

The extended Worley (post ECQ) now operates globally through 250 locations across 51 countries. Geographically, FY19 revenues (including ECQ) are split Australia, Pacific, Asia and China (21%), Europe, Middle East and Africa (41%); USA (17%); other Americas (21%). It’s advisory arm, 2,600-strong Advisian, operates globally from 52 locations in 19 countries focused on most intensive businesses in hydrocarbons, minerals & metals, chemicals and infrastructure sectors, with 500 environmental staff.

North America
- Worley acquired its first office in North America in 1981. Regional presence was reinforced via environmental consultant Komax (2005) and subsequently MTF. Canada is Advisian’s largest environment brings long-term relationships in Canada’s upstream and downstream sectors.
- Recent projects: Canada, delivery of geological engineering, environmental assessment and project management services for the new Goldcorp project at Papalbot and Pond Inlet, Nunavut; vegetation and wildlife surveys for wind farm siting studies in Alberta; and environmental assessments for Soo Locks – site for co-contaminants in sulfane bioremediation.

Asia-Pacific
- Australia represents second largest environmental market, where it provides services in water management, waste management, contaminated land, social license to operate, mine site services, hydrology, environmental monitoring, and decommissioning and closure requirements. Advisian’s services include environmental advisory, supporting a wide range of scope, including water and rail infrastructure, power and water.
- Recent projects: EIS, management plans and regulatory approvals for St. John’s Point, Queensland, EIS for Wal-Mot Project, PNG. Support project planning, transition to sustainable hydrogen economy. EIS for Eden Breakwater, Channel, Australia; management of EIS, post consent approval, enviro management of Nyngana Coal Project, Kooragah Australia, appointed by EIS for power plant design, South Australia High Purity Manganese Project, Western Australia.

Europe
- Integrated, multi-disciplinary team based in UK and Spain. Advisian is the market leader in all major markets. Advisian’s services include geological, hydrology, environmental monitoring, and decommissioning and closure requirements. Advisian’s services include environmental management, and water and rail infrastructure, power and water.
- Recent projects: environmental management at Samsat (France), Lubeck/Lubeck (Germany), and advising into project planning, transition to sustainable hydrogen economy. Advisian’s services include environmental management, and water and rail infrastructure, power and water.

Latin America
- Advisian’s activities in Latin America have grown significantly, with operations in Latin America having a dedicated team dedicated to serving the region’s largest EC markets. Advisian is operating locally in Argentina, Brazil, Chile, Colombia, and geotechnical design.

Africa & Middle East
- Advisian’s activities in Africa and the Middle East have grown significantly, with operations in Africa and the Middle East having a dedicated team dedicated to serving the region’s largest EC markets. Advisian is operating locally in Sub-Saharan Africa, Middle East, and Middle East.
- Recent projects: Advisian’s activities in Africa and the Middle East have grown significantly, with operations in Africa and the Middle East having a dedicated team dedicated to serving the region’s largest EC markets. Advisian is operating locally in Sub-Saharan Africa, Middle East, and Middle East.

*Advisian offices in 2019
Key services
Advisory's EC services include assessment and management of environmental, social and human health impact, project approvals, social performance and stakeholder engagement, marine sciences, enviro risks and liabilities, contaminated sites and remediation, water resource management, water solutions, sustainability and carbon advisory, waste and waste by-products, facility closure, remediation and decontamination, and earth sciences. Environmental practitioners also work in integrated teams with wider Advisory teams offering strategy, management and technical consulting services.

Key global clients

OVERARCHING INSIGHTS
- Worley (formerly WorleyParsons) delivers projects, provides expertise in engineering, procurement and construction, and offers consulting/advisory services to hydropower, minerals & metals, chemicals and infrastructure sectors.
- 2005 purchase of Canadian environmental consultant, Komex, secured a place in global environmental management space, and a move into front-end services (impact assessment, sustainability, carbon management, water resources, marine sciences, and environmental sciences). Enviro activities are underpinned by significant long-term contracting base (incl major EPC/M contracts), which has helped through resources downturn since 2014. As has focus on expanding operations in developing economies.
- Firm has exploited opportunities linked to rising investment in LNG export in N America, and those linked to ageing O&G/energy sector infrastructure and unconventional gas. Focus on restoration services is driving decommissioning remediation work.
- Restructured since 2014 from resources downturn. In late 2015, Worley received a highly conditional take-over proposal from Dubai’s Dar Dowan, which it rejected on the basis that it “materially undervalued the company.” Early 2017 Dar owned 13% stake in Worley, progressively increased under the ‘creep’ provision, making it the biggest shareholding. Full control would give Worley more leverage in terms of resources and energy across differing regions. Digital solutions and B&M & Relevant PartnGrowth in key European chemicals sector.
- 2017 Worley acquired AFW UK, providing ‘robust entry’ to UK. New strategy to become global provider of maintenance, modifications and growth in key European chemicals sector.
- 2019 Worley acquired Jacobs’ energy, chemicals and resources business in the UK and the Middle East. Jacobs retains a 11% stake in enlarged Worley. At strategy level, ECR. Transformational strategy post acquisition aims to leverage petrochemicals, capture the opportunities presented by digital products.

GLOBAL STRATEGY
- Explored by Worley in global hydrocarbons sectors, Worley implemented measures across disciplines, better targeting new work and improving market share. Focusing on customer delivery, portfolio optimization and strengthening the balance sheet. It is reshaping resources and energy across differing regions. Digital solutions and B&M & Relevant PartnGrowth in key European chemicals sector.
- 2017 Worley acquired AFW UK, providing ‘robust entry’ to UK. New strategy to become global provider of maintenance, modifications and growth in key European chemicals sector.
- 2019 Worley acquired Jacobs’ energy, chemicals and resources business in the UK and the Middle East. Jacobs retains a 11% stake in enlarged Worley. At strategy level, ECR. Transformational strategy post acquisition aims to leverage petrochemicals, capture the opportunities presented by digital products.

ENVIRONMENTAL ANALYST SWOT
S+ Mergers with Jacobs and EC/ECR industry advantages to function on an expanding scale.
S+ Advisory consulting and technology offerings, with notables.
W+ Hard hit by global commodity downturn and an aggressive programme and reduced utilization.
W+ Heavily invested in systems and drives, including its own international.
0+ No significant changes.
0+ No significant changes.
T+ Potential for growth in the market.
T+ Potential for growth in the market.
1971 - Smith, d'Alcantara, Whitsunday and Grill established as a structural engineering consultancy based in Sydney, Australia.
1986 - Acquires Australian and Asian interests of Worley, a North American offshore O&G engineering firm.
1995 - Changes name to Worley, creates local JVs in SE Asia.
2002 - Listed on Australian Stock Exchange, acquires operations in Canada, China, Oman.
2003 - Acquisition of 15-strong environmental engineering and consultancy Astron (Australia).
2004 - Merges with Parsons EBC (global leader in downstream hydrocarbons), begins trading as WorleyParsons.
2005 - Acquisition of Canada-based remediation specialist Komes Environmental for $34m, brings 420 staff working across North America and Europe (2004 annual revenue $43.5m).
2006 - Enters S America through JV with local engineering firm, acquires Codl Companies (Canadian design and project services firm to power sector) for $1.13bn. Acquires two leading water and environmental consultants in Australia - Patterson Britton and Partners and John Wilson.
2007 - Acquires Astron (environmental services in Australia) and US-based nuclear specialist Polarstar for $811m.
2008 - Enters South African market with 51% acquisition of Pangaea, forming PangaeaWorleyParsons.
2008 - Acquires Westmar Consultants (Canada-based marine and port, mining and infrastructure specialist).
2008 - Acquires Evans and Peck, an Australian infrastructure advisory group, for $271m.
2010 - Acquires ONEC (Brazilian engineering group) with EIA capabilities in hydropower sector for $1.7bn.
2011 - Acquires Keev V3 Engineers (Pty) Ltd (KV3) - a multidisciplinary infrastructure engineering consultancy based in South Africa with 900 staff, subsequently renamed WorleyParsons RSA.
2012 - Andrew Wood appointed to succeed John Grill as chief executive officer.
2013 - Acquires 1,100-strong South African TWP, provider of EPCM and asset services largely in mining across Africa and Latin America.
2013 - Acquires 500-strong Norwegian firm Bergen Group Rosenberg AS (Rosenberg) which provides engineering, fabrication and construction solutions to Norway’s offshore oil and gas sector.
2014 - WorleyParsons Gp, providing business and asset advisory services to a range of hydrocarbons, transport, utilities, social infrastructure and minerals, metals and energy.
2014 - Acquires 30-strong Atlantic Nuclear Services, headquartered in New Brunswick, nuclear technology, inc. environmental science and socio-economic impact analysis.
2015 - Strategic alliances signed with consultancy/software provider to focus on technologies, technology firm BrainChip Inc, global security and analytics.
2017 - Early 2017, Dubai-based Dar Al Handasah Consultants Shiekh Zayed Road, “a substantial shareholder” of, an international multidisciplinary firm, architecture, planning and economics, with 18,000 staff, stake “with a long term strategic perspective and focus.”
2017 - Partners with UpGrid, US firm specialising in energy with Deloitte to help fast-track capital projects.
2017 - Adrian Smith appointed group managing director.
2017 - Acquires AFW UK (UK) upstream O&G engineering Group for $303m. AFW (subsequently renamed in UK and Middle East, still provides a global provider of O&G operations.
2018 - Establishes a Climate Change climate change programme.
2019 - Steven Whittall appointed.
2019 - Acquires Jacobs’ 31.5% stake in Jacobs (UK) Ltd (Jacobs UK) for $171m, raises $11.5bn. Equity 
2019 - Acquires Jacobs( £7bn).
2019 - Backing up 10%
2019 - Boosts to 10%
2019 - Formed (EBC)
2020 - (EBC)