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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. 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 UK Market Intelligence Service, please download the Definitions and Methodology (UK) document from the EA [website](http://www.environment-analyst.com).

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 UK Market Intelligence Service can also download other reports in this series separately from the download page [www.environment-analyst.com/uk-mis](http://www.environment-analyst.com/uk-mis).

For details of how to access, please contact Faye Heslin-Jones at ea.sales@environment-analyst.com or call (0)1743 818 008.
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- **Tel**: 020 7645 2000
- **Fax**: 020 7645 2099
- **Directors & key contacts**: Andy Barker (Managing Director – environment and ground engineering, United Kingdom and Ireland); Stuart Coventry (Director – Growth, Environment and Ground Engineering Strategy EMEA & India)
- **Ownership**: US parent AECOM Technology Corp listed on NYSE
- **Locations**: Global (>120 countries)
- **Founded**: 1990 (AECOM launched as an independent company) [includes URS Corp - founded 1957 - from 2013/14 year of acquisition]

## UK 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>Turnover, group</td>
<td>£790.9m</td>
<td>£730.9m</td>
<td>£730.9m</td>
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<tr>
<td>Turnover, environmental services (inc. consulting)</td>
<td>£180.9m</td>
<td>£185.9m</td>
<td>£194.9m</td>
<td>£205.9m</td>
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<tr>
<td>Turnover, environmental consulting (as defined by EA)</td>
<td>£90.9m</td>
<td>£93.9m</td>
<td>£98.9m</td>
<td>£118.9m</td>
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<tr>
<td>Turnover 5-year growth, environmental consulting</td>
<td>512.7%</td>
<td>475.1%</td>
<td>709.9%</td>
<td>709.9%</td>
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<tr>
<td>Operating profit, (UK) group</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>No of offices (environmental consulting)</td>
<td>35</td>
<td>35</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Staff, group (average for year, FTE)*</td>
<td>7,500</td>
<td>7,400</td>
<td>7,400</td>
<td>7,400</td>
</tr>
<tr>
<td>Staff, environmental services</td>
<td>1,800</td>
<td>1,850</td>
<td>1,850</td>
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<tr>
<td>Staff, environmental consulting</td>
<td>925</td>
<td>950</td>
<td>950</td>
<td>950</td>
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<tr>
<td>Turnover per head, environmental consulting</td>
<td>£97.3k</td>
<td>£97.9k</td>
<td>£97.9k</td>
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<tr>
<td>No of contracts, environmental consulting</td>
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<tr>
<td>Average contract value, environmental consulting</td>
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<td>£84.5k</td>
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### GLOBAL VITAL STATISTICS
<table>
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<th>2016/17</th>
<th>2017/18</th>
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<tbody>
<tr>
<td>Turnover, group</td>
<td>£13,803.4m</td>
<td>£13,352.9m</td>
<td>£13,352.9m</td>
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<tr>
<td>Turnover, environmental consulting</td>
<td>£1,879.8m</td>
<td>£1,849.9m</td>
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<td>£1,879.8m</td>
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<tr>
<td>Staff, group</td>
<td>90,000</td>
<td>90,000</td>
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<td>90,000</td>
</tr>
<tr>
<td>Staff, environmental consulting</td>
<td>6,800</td>
<td>6,800</td>
<td>6,800</td>
<td>6,800</td>
</tr>
</tbody>
</table>

## UK ENVIRONMENTAL CONSULTANCY REVENUES

### KEY REVENUE RATIOS

![Geographic revenue chart]

**SAMPLE PROFILE**
COMMENTARY

AECOM is a Fortune 500 company and one of the largest global integrated consulting engineering and design firms, active in c120 countries. The company’s DBFO (Design, Build, Finance, Operate) services have historically centred around four principal groups: design and consulting services (DCS); construction services (CS); management services (MS), which works with governments, and AECOM Capital (ACAP) which invests in projects. Mid-2019 AECOM announces intention to spin out its 25,000-strong $4bn MS segment.) Environmental offerings are housed within DCS, which also includes architecture, cost consultancy, design, economics, energy, engineering, planning and program management technical services.

2014 saw globally transformational acquisition of NYSE-listed URS, inc EC capabilities, instantly boosting UK EC revenue sevenfold. In UK, the merged enviro teams enjoyed an increase in environmental contracting (ecology, archaeology, noise/vibration, air quality) for major UK infrastructure projects. Recent service extensions since include: launch from UK operation of Environmental Economics business service to serve EMA region, expansion of demolition/immediation of industrial sites to turnkey service in UK, development and publication by UK teams of a digital EIA, extension of “Lump Sum Environment Contracting” to include both contaminated land and ecological habitat construction. In 2019 AECOM launched a large-scale timbered for natural capital, rewilding and digital technology techniques in Scotland, the world’s first “natural capital laboratory.”

Recent EC project wins include: environmental oversight and mitigation for A1 N Yorkshire motorway upgrade; EIA and permitting processes for Glyn Rhone pumped storage project; Llanberis, appointed Lot 2 partner for civil design and environmental services (CDIES) as part of JV with Capita and INRECO for HS2 Phase 2b (exposure to HS2-related revenue totalling £500m); ecology work for Mersey Gateway Environmental Trust (£1.5m); enviro services for Network Rail’s Transpennine Rail Upgrade (£1.5m); development of Manchester’s clean air plan (with Arup), awarded a framework position on four year £400m Dowsetts decommissioning programme.

CORPORATE DEVELOPMENTS/M&A

1990 - AECOM launches as an independent company, created through a spin-off employee-owned Technology (petroleum-refining business based in Kentucky, USA)
2001 - Acquires Oscar Faber (including ECD Energy & Environment), annual revenue £310m
2005 - Acquires EDAW, ENER International (US-based design & environmental consultancy)
2007 - AECOM IPO on New York Stock Exchange
2010 - Acquires Spanish multidiscipline design consultancy (c500 staff) (including experts in underground infrastructure), Canadian energy infrastructure consultancy RSW with David Langdon - a (2,800 global project management and cost management staff)
2012 - Acquires 100-strong Taiwanese enviro/engineering consultancy
2012 - Acquires 900-strong South African consulting and engineering business
2014 - Acquires NYSE-listed firm URS Corp. for £6.4bn in cash and stock
2014 - Acquires Madrid-based ACE International Consulting
2014 - Acquires Hunt Construction Group, 750-strong, operating in 9 US offices with 2013 revenue £520m
2014 - Peter Skinner appointed EMEA managing director
2015 - Announces a plan to expand global footprint and to support it “in delivering targets in an effective, targeted manner within the UK context”
2016 - Washington, D.C. office opens
2016 - Appointed to lead new operating company
2017 - Appoints A Hannum as chief sustainability officer
2018 - Andy Barker appointed the firm’s new chief financial officer
2018 - FY17/18 sees 10.7% rise in revenue, 5.7% growth in net income and 10.7% increase in bookings. Earnings per share up 18.8% to 57.9p
2019 - Late 2019: London office opens

Notes: “UK Competitor Analysis 2019”

SAMPLE PROFILE