

# Adapting in a Changing Environmental Industry

James MacDermott

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## Introduction

- Case Example – adaptable or by chance?
- Context of changes in environmental market
- Key drivers in the environmental market
- Different environmental roles persisting and emerging

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## Case Example

- Civil Engineer by qualification
- First years after graduating - geotechnical investigations -
- Morphed to contaminated land investigations –
- Industrial site audits and assessments – left Europe to come to Brisbane
- Impact assessment, EMS, Corporate reporting -
- Corporate Environment Management (GPN and QGC) –
- Senior consultant

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## Context – changes in the environmental market

### *The Global Environmental Market by Region (\$bil and % growth)*

By Region	2011	2012	2013	2011	2012	2013	2014
USA	308.7	325.8	340.4	7%	6%	4%	4%
Western Europe	285.6	287.9	292.0	2%	1%	1%	2%
Japan	101.7	103.2	104.8	0%	1%	2%	2%
Rest of Asia	103.3	110.7	118.6	9%	7%	7%	7%
Mexico	13.1	13.7	13.9	4%	4%	2%	5%
Rest Latin America	39.9	41.6	43.7	6%	4%	5%	6%
Canada	28.0	29.7	31.8	6%	6%	7%	7%
Australia/NZ	28.0	29.1	30.0	3%	4%	3%	3%
Cent/East Europe	26.9	27.5	27.9	4%	2%	1%	2%
Middle East	26.2	28.9	31.3	10%	11%	8%	8%
Africa	11.6	12.1	12.6	8%	4%	4%	8%
<b>Total</b>	<b>973</b>	<b>1,010</b>	<b>1,047</b>	<b>4.6%</b>	<b>3.8%</b>	<b>3.6%</b>	<b>4.1%</b>

Source: Environmental Business International, Inc., San Diego, Calif. units in \$bil

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### Couple of conclusions from Global Market by Region

Growth – around 3.5-4.5% per year 2011-2013

Largest growth (2014) – Middle East, Africa, Rest of Asia, Canada and Latin America

Lowest growth (2014) – Europe (Cent, East and West)  
Japan, Australia/NZ

Generally largest growth in regions with small market base

Source: Environment Business International Inc, published in Environment Business Journal  
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### More Context

Reduced investment in Australia for major projects

Number of Coordinator General Projects (21 open)

“Productivity” questioned (uncompetitive)

Internal migration and population growth - infrastructure development

Government funding for infrastructure projects

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## Key Drivers for Environmental Market

Enforcement – legislative changes

Community concerns

Increasing resource demand

Urbanisation – movement of people to cities

Developing countries 'middle class'

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## Examples of different environmental roles

- Generalist vs specialist (expert)?
- Certified Practitioner in Erosion and Sediment Control (CPESC)
- Environmental Management Systems
- Environmental auditors (RABQSA, Exemplar Global) (compliance obligations)
- Bushfire increasing focus
- Offsets specialists – new Queensland Environment Offsets Policy (July 14)
- Environmental accounting
- Climate change specialists

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## Environmental roles (cont'd)

- Carbon accounting
- Resources/Agricultural space – cropping land – Regional Planning  
Interests – new legislation

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## Conclusions

Australian market readjusting to downturn and pressures on productivity (costs)

Flexibility

Geographic choices

Opportunities in areas related to your experience and expertise – keep eyes open

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