

Who are the experts in waste?

WELCOME to the second annual edition of *Inside Waste's* Consultant's Review where we ask: who are the leading experts in waste and resource recovery? Building on the 2012 review, this year we asked the same questions of a much larger field of respondents.

As part of the survey, we attempt to gauge four key elements in the market.

Firstly, we ask respondents which consultants undertook the most work, and which consultants received the largest projects. This allows readers to establish who are the key players.

Secondly, we then ask survey respondents to assess the specific skills of different consultancies by asking them to nominate who leads across five different categories.

Thirdly, we attempt to gauge the growth of the consultancy market in Australia by asking respondents if they spend more on consultants this year than last year, and if they expect to spend more in future.

Finally, we offer respondents an opportunity to share a "brickbat or bouquet" regarding consultants who they have hired, with the best pieces of feedback shared. All comments shared are anonymous.

The 2013 survey received a much larger response than in 2012, with 111 people completing the survey. Of the respondents, the majority were from local government, but private sector waste services, state governments, landholders and even consultants reviewing consultants were represented.

In order to fairly assess the market, consultancies were divided into "small" and "large", with boutique waste consultancies ranked against each other rather than against large, international firms with thousands of staff.

The overall winner for 2013 was GHD, which also won the 2012 consultants review. Once again, GHD dominated not only the projects offered, but also expertise across three of the five categories. GHD was particularly strong in technical categories, such as technology and infrastructure assessment and landfill design.

That GHD could not only win a second year, but also win by a larger margin, demonstrates the firm's strength of expertise in waste and resource recovery.

Behind GHD was SLR, which moved up from fourth in 2012 to second in 2013. While SLR performed strongly across all categories, it stood out in our "brickbat or bouquet" section,

receiving several glowing compliments from survey respondents.

"SLR Consulting (has) been a pleasure to work with," wrote one reader, while another wrote: "Very impressed with the work conducted by SLR."

Behind SLR was Golder Associates, which maintained its third place ranking from 2011 and was particularly strong in projects given and value of projects categories.

In fourth place was SKM, which didn't dominate any particular category but was consistency highly placed across all categories.

Fifth place was taken by Hyder, which fell from second in 2012. While Hyder dominated the greenhouse, reporting and compliance categories, it slipped both in terms of number of contracts awarded and the value of those contracts.

The small consultancy category was won easily by Mike Ritchie and Associates (MRA). While MRA was strong across all categories, its overwhelming dominance in the reporting and compliance category gave it the lead.

Behind MRA was Wright Corporate Strategy, which won the technology/infrastructure review and evaluation category and the strategy, policy and planning category.

Other notable accolades went to Impact Environmental, which won the best tender development and evaluation category; KMH Environmental as a high performer across all categories; and Bowman and Associates, which won the engineering and design categories.

While we have done our utmost to collect as much information as possible, be aware the results presented here are merely the summarised results of the respondents, not a quantitative evaluation of the market. With that noted, we hope you find our survey useful.

Category Winners: Large Consultancies

Overall Winner:

- 1) GHD
- 2) SLR
- 3) Golder

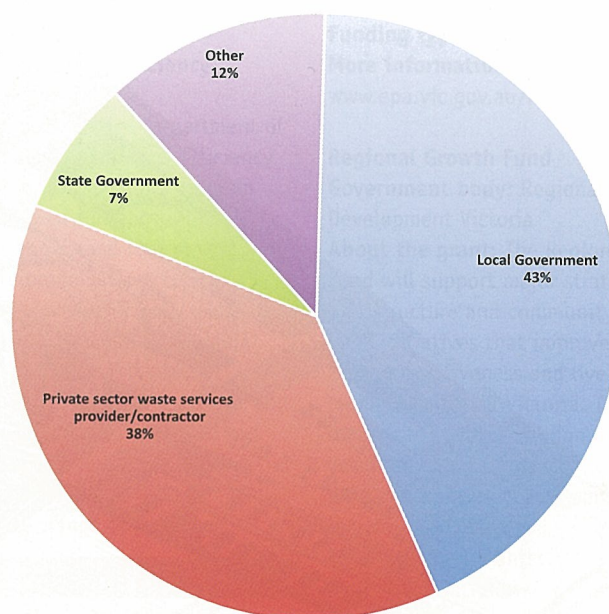
Highest Value Projects:

- 1) GHD
- 2) Golder
- 3) SKM

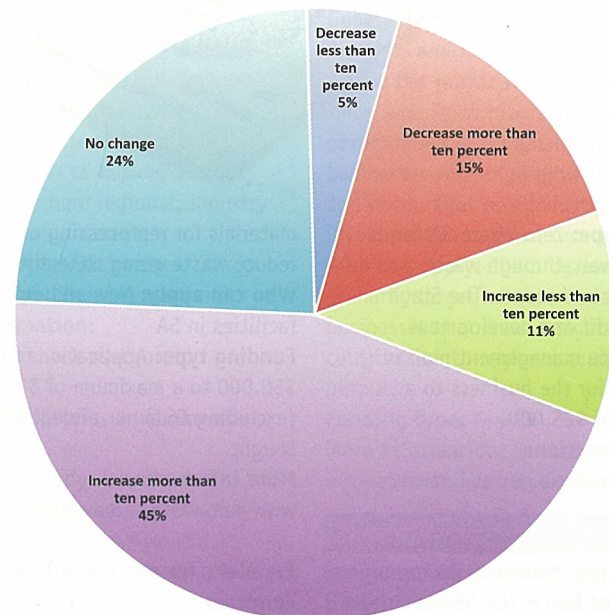
Most Projects Awarded

- 1) GHD
- 2) Golder
- 3) SKM

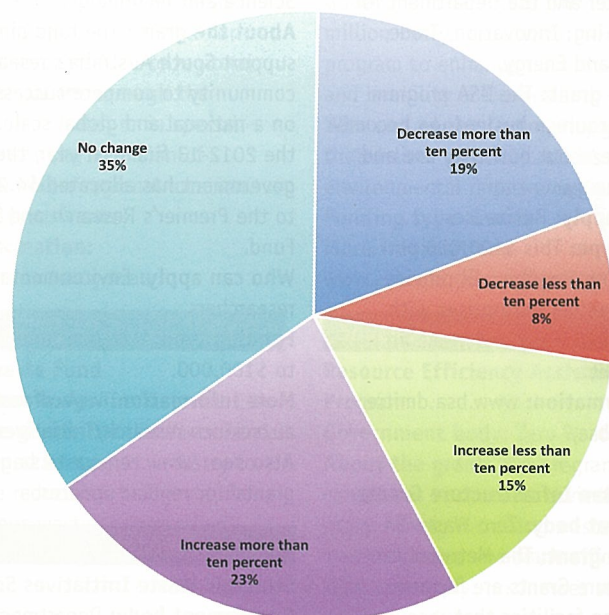
Breakdown of 111 respondents



How did your spending on consultants change in 2012?



What change in spending do you expect in 2013?



Best Technology and Infrastructure Evaluation

- 1) GHD
- 2) Hyder
- 3) SKM

Best Landfill Design and Engineering

- 1) GHD
- 2) Golder
- 3) SLR

Best in Environmental/Greenhouse Management, Reporting and Compliance

- 1) Hyder Consulting
- 2) GHD
- 3) SLR

Best in Strategy, Policy and Planning

- 1) SLR
- 2) SKM
- 3) Hyder Consulting

Best in Tender Development and Evaluation

- 1) GHD
- 2) SLR
- 3) SKM

Category Winners: Small Consultancy**Overall Winner:**

- 1) Mike Ritchie and Associates
- 2) Wright Corporate Strategy
- 3) KMH Environmental

Best Technology and Infrastructure Evaluation

- 1) Wright Corporate Strategy
- 2) Mike Ritchie and Associates
- 3) KMH Environmental

Best Landfill Design and Engineering

- 1) Bowman and Associates
- 2) KMH Environmental
- 3) Mike Ritchie and Associates

Best Facility Design and Engineering

- 1) Bowman and Associates
- 2) KMH Environmental
- 3) Wright Corporate Strategy

Best in Environmental/Greenhouse Management, Reporting and Compliance

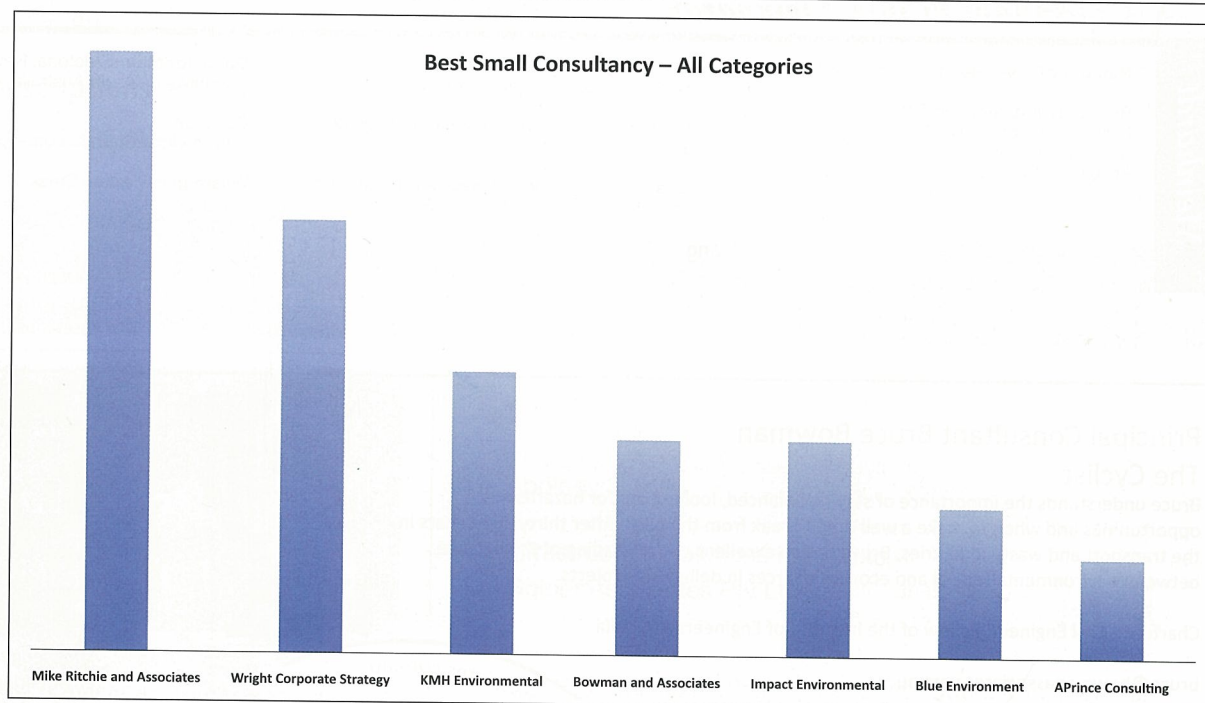
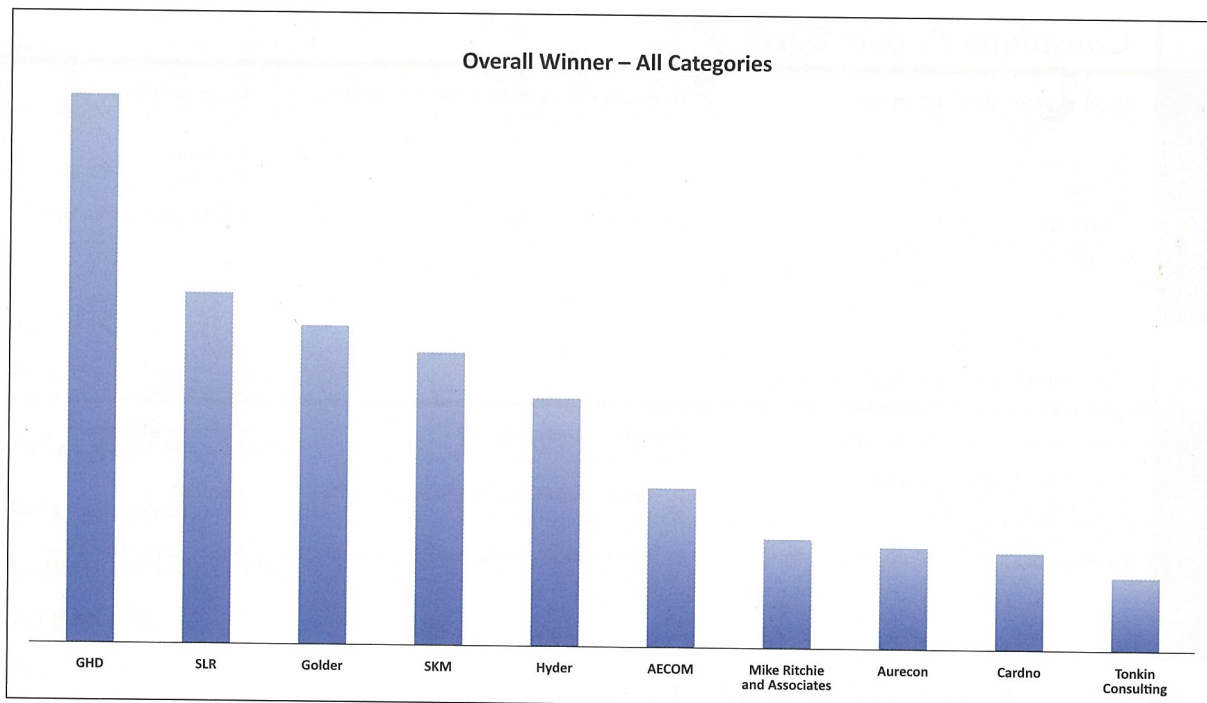
- 1) Mike Ritchie and Associates
- 2) Blue Environment
- 3) EC Sustainable

Best in Strategy, Policy and Planning

- 1) Wright Corporate Strategy
- 2) Mike Ritchie and Associates
- 3) KMH Environmental

Best in Tender Development and Evaluation

- 1) Impact Environmental
- 2) Mike Ritchie and Associates
- 3) Wright Corporate Strategy

**Brickbat or Bouquet?****The Brickbats**

"Thanks to the Federal Government, 2012 has been a dream year for consultants in the carbon compliance area."

"Firms have a tendency to promote a particular capability even though key staff responsible for their track record may have moved to other organisations ... other firms listed have attempted to diversify into this specialist field without a critical mass of technical resources to properly service the client needs."

"Sometimes the consultants try and direct the client to the Rolls-Royce option and not the practical and affordable option."

"GHD has proven to be overworked in the past few years, paying more attention to providing "killer" proposals but not

following up with work which meets expectations ... having said that, GHD does produce "killer" EIS documents which are favourably assessed by EPA."

The Bouquets

"We employed Anne Prince Consulting as a sub-consultant and our client commented how impressed they were with how professional APC was."

"Paul Howlett of (Wright Corporate Strategy) is very competent at strategy development and project evaluation."

"Mike Ritchie has a very good strategic overview and appreciation of the practicalities and politics of waste management in Australia."

"Anne Prince knows more about waste auditing than anyone."

"Darryl Moore of Entech has a comprehensive understanding of waste

industry economics and regulatory issues."

"SLR Consulting embrace a collaborative approach and respond well to client feedback to ensure that their work meets the needs of the client."

"SMEC have worked on landfill design projects and have proven to be extremely professional and efficient at producing designs within strict parameters and complicated site conditions."

"Robert Bailey Consulting is extremely professional and provides an immense wealth of practical knowledge that can be easily applied ... great follow-up on projects undertaken."

"SKM always approached their work with a professional attitude. They were very knowledgeable about waste management and planning yet able to ask questions to ensure that they were on track." **iw**