EBI ENVIRONMENTAL BUSINESS INTERNATIONAL INC.

Natural Resource Management

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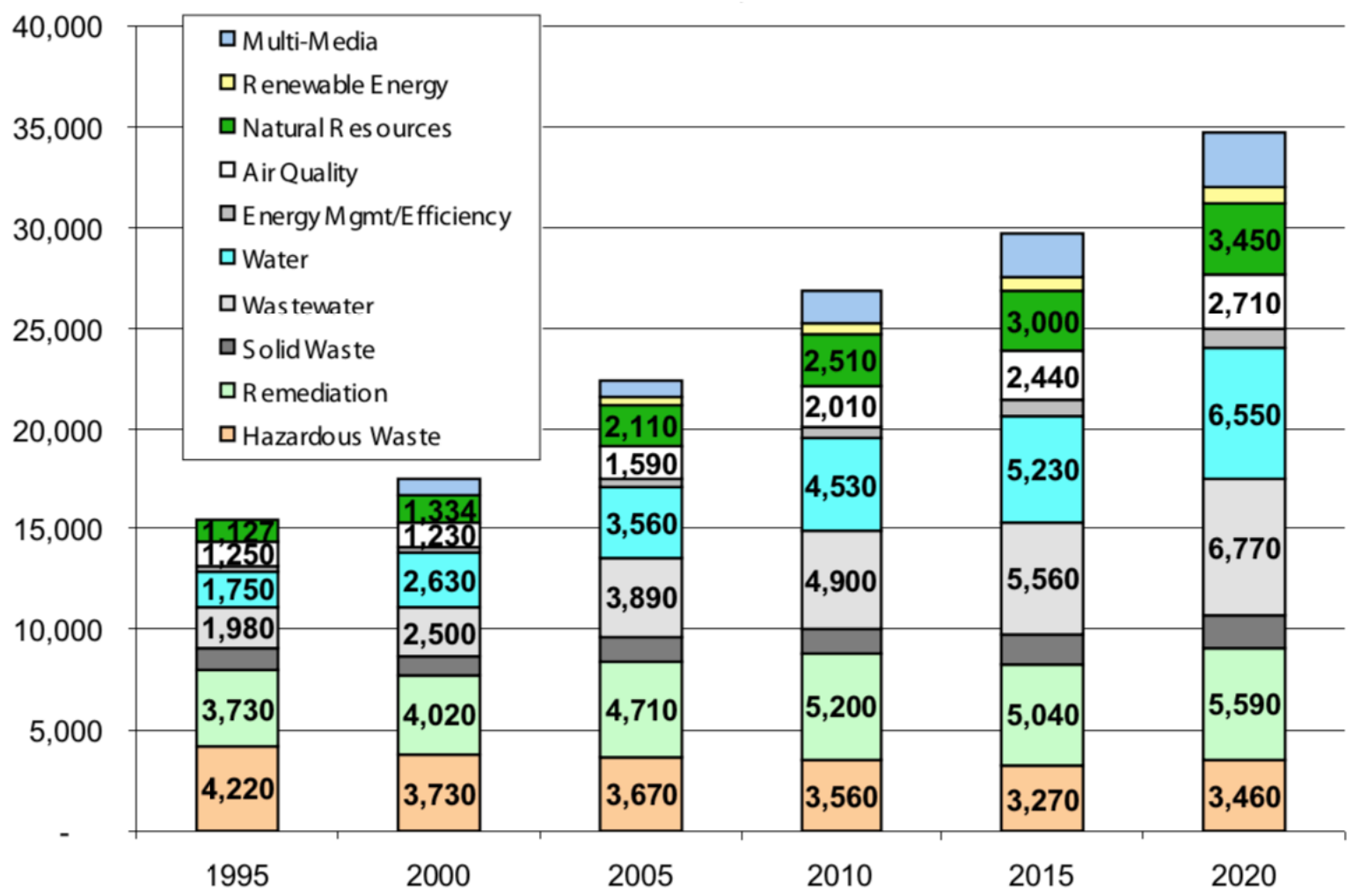
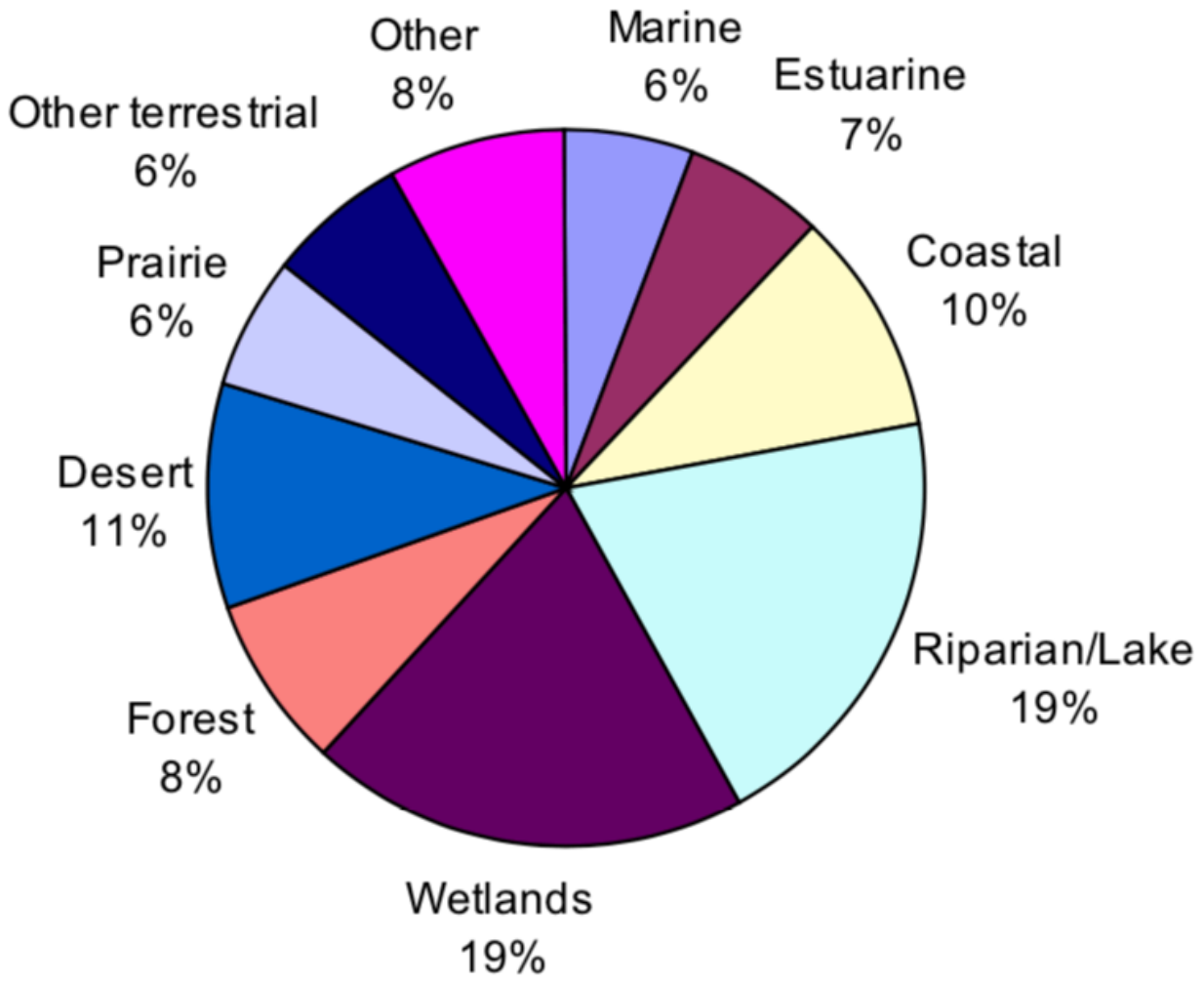
U.S Environmental C&E Market by Media, 1995-2020 ($mil)



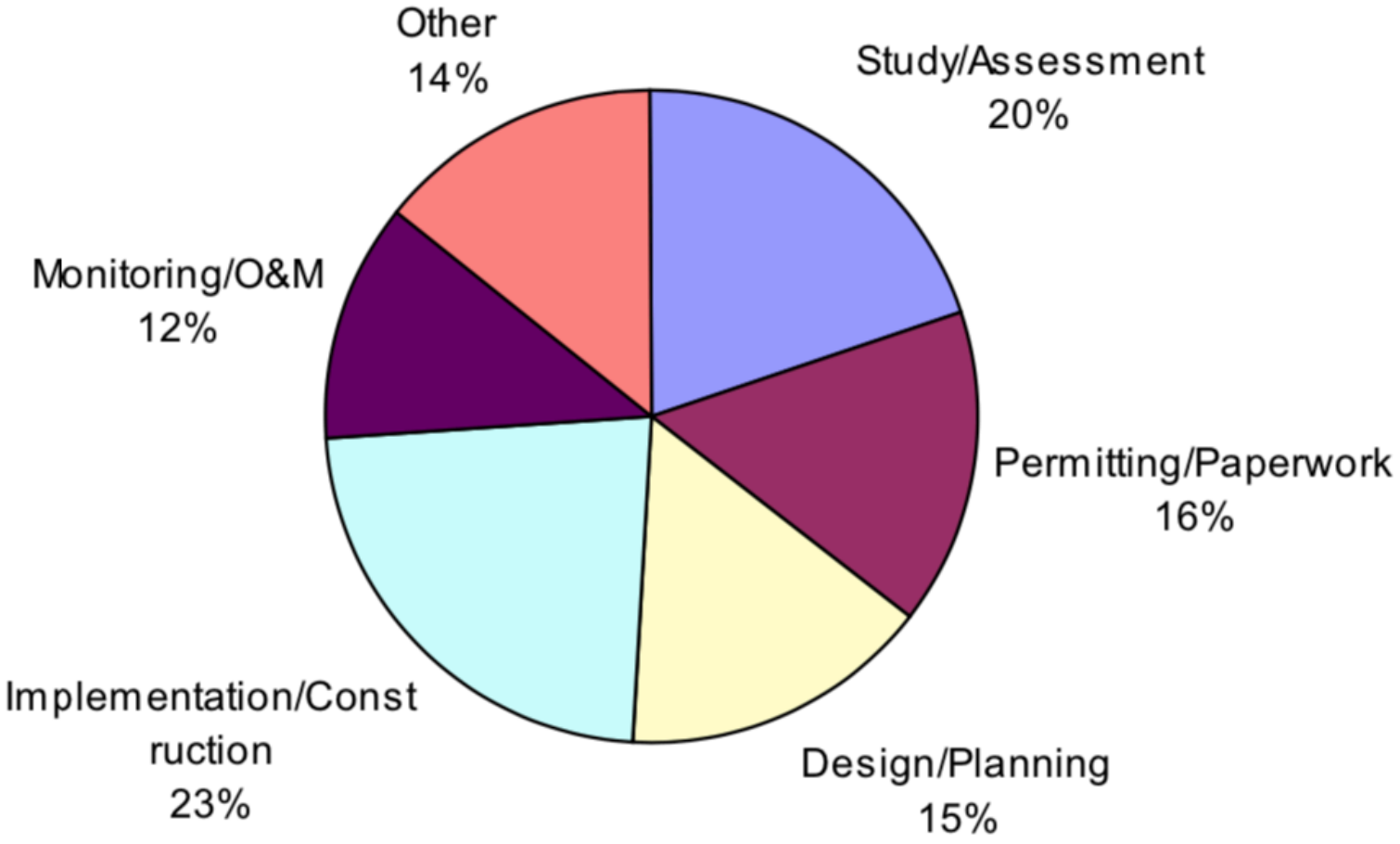
Source: EBJ annual models of the U.S. environmental consulting & engineering industry

Breakdown of Natural Resources Services by Project Area



Source: 2019 EBJ Survey Natural Resources Management Services. Question was: In percentage terms, approximately how does your company's portfolio of Natural Resources Management Services break down by.

Breakdown of Natural Resources Services by Project Phase



Source: 2019 EBJ Survey Natural Resources Management Services. Question was: Looking at the entire Natural Resources Management project cycle, on average what percentage of the total cost is represented by each of the following stages.

Influence of Market Drivers for Natural Resources Management Services

	Crucial	Very Important	Important	Not Very Important	Meaningless	No Opinion
Federal Laws & Regs: ESA, NEPA, CERCLA, etc.	42%	29%	26%	0%	0%	3%
State Laws & Regs	29%	50%	18%	0%	0%	3%
City/County Laws & Regs	11%	29%	43%	14%	0%	3%
Wetland Mitigation& Conservation Compliance programs/banking	5%	24%	51%	11%	5%	3%
Stakeholder concern/pressure on development	6%	25%	44%	14%	8%	3%
Climate change issues	11%	11%	55%	13%	5%	5%
Remediation requirement	11%	19%	33%	17%	8%	11%
Natural Resource Damage Assessment (NRDA) requirement	8%	8%	28%	22%	14%	19%
Recreation/hunting interests	6%	3%	32%	35%	15%	9%
Corporate priority to NRM, habitat restoration or CSR	5%	8%	22%	38%	11%	16%
Non-profit or NGO partner funded projects	6%	14%	17%	28%	19%	17%
Non-reg programs – e.g., Gulf Coast Ecosystem Restoration or America's Great Outdoors Initiative	0%	17%	22%	28%	14%	19%

Source: 2019 EBJ Survey Natural Resources Management Services. Question was: Rate the importance of the factors driving Natural Resources Management projects.

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EBJ Survey: Trends in Regulations & Impact on Business

Responses to open-ended questions in EBJ's October 2019 NRM survey

- State laws and regulations are becoming stronger to offset the Federal government. Solid economy leading to more development and more natural resources work.
- No impact on our business yet. We'll wait to see if the O&G industry honors the newer Foreign Intelligence Surveillance Act (FISA) requirements, addresses climate change and environmental liability properly, and if so what effect that might have.
- More project detail or advanced design before permits are issued - and this conflicts with our design-build model
- Streamlined federal permitting and EISs, plus easing of regs. Variability at state level. Water quality credits program has expanded several markets.
- We have been successfully guiding clients through regulatory changes and uncertainty associated with CWA, ESA, and NEPA to meet project budgets and schedules.

Source: EBJ 2019 Survey of Natural Resources Management Services. Question was: What new trends in regulatory requirements have you noticed in the Natural Resources Management industry over the past couple of years? Comment on how it has affected your business.