



Water Business Overview

Jacobs

Challenging today.
Reinventing tomorrow.

Sustainable Business Objectives



Advance the health and well-being of society



Create a fair and inclusive future for all



Deliver solutions for the global water and sanitation crisis



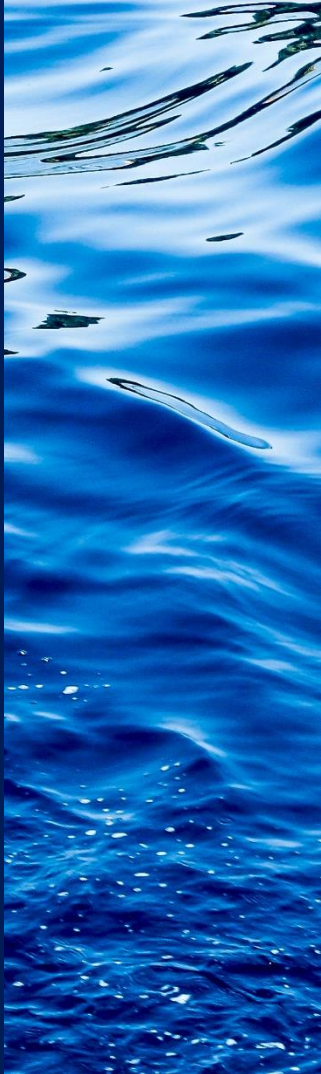
Develop efficient and resilient critical infrastructure solutions that deliver net environmental gain and serve all of society



Innovate for technological and scientific breakthroughs that have positive societal impact



Accelerate solutions that address the climate emergency



Going Beyond

Water for People

Employee giving campaign raised \$315k in 2020; ~\$3M since 2003

US Water Alliance

Member – practices and policies that foster equitable water management

Leading Utilities of the World

Foundation partner – practices and policies that ensure access to clean water and sanitation and social justice and equity

Stockholm Industry Water Award

International recognition for leadership in potable water reuse

Water Utility Operations Management

We directly supply clean water to 9.5M customers – 597M gallons per day



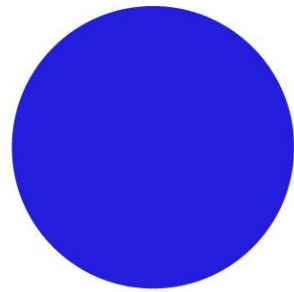
PlanBeyond is Jacobs' approach to sustainability – planning beyond today for a sustainable future for everyone. Fully integrated into our global business, PlanBeyond delivers on our company purpose to create a more **connected, sustainable world.**



2021 GLOBAL WATER MARKET

\$879 Billion

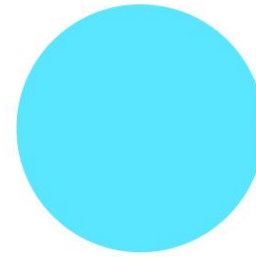
Source: Global Water Intelligence, August 2021
Values in US Dollars



Utilities
\$646 B



Industries
\$232 B



OPEX
\$566 B



CAPEX
\$312 B



East Asia/Pacific
\$310 B



North America
\$219 B



Europe/
Central Asia
\$206 B



Middle East/
North Africa
\$72.3 B



Latin America/
Caribbean
\$41.9 B



South Asia
\$28.9 B



Technologies
\$172 B



Digital
\$44.1 B



Utility
\$38.4 B



Industrial
\$5.7B

UTILITY TECHNOLOGIES



Data
Collection
\$21.9 B



Control
Systems/
SCADA
\$9.3 B



Data Mgmt./
Analysis
\$7.2 B

Note: Technologies and Digital categories do not add up to the total

Jacobs' Water Industry Position

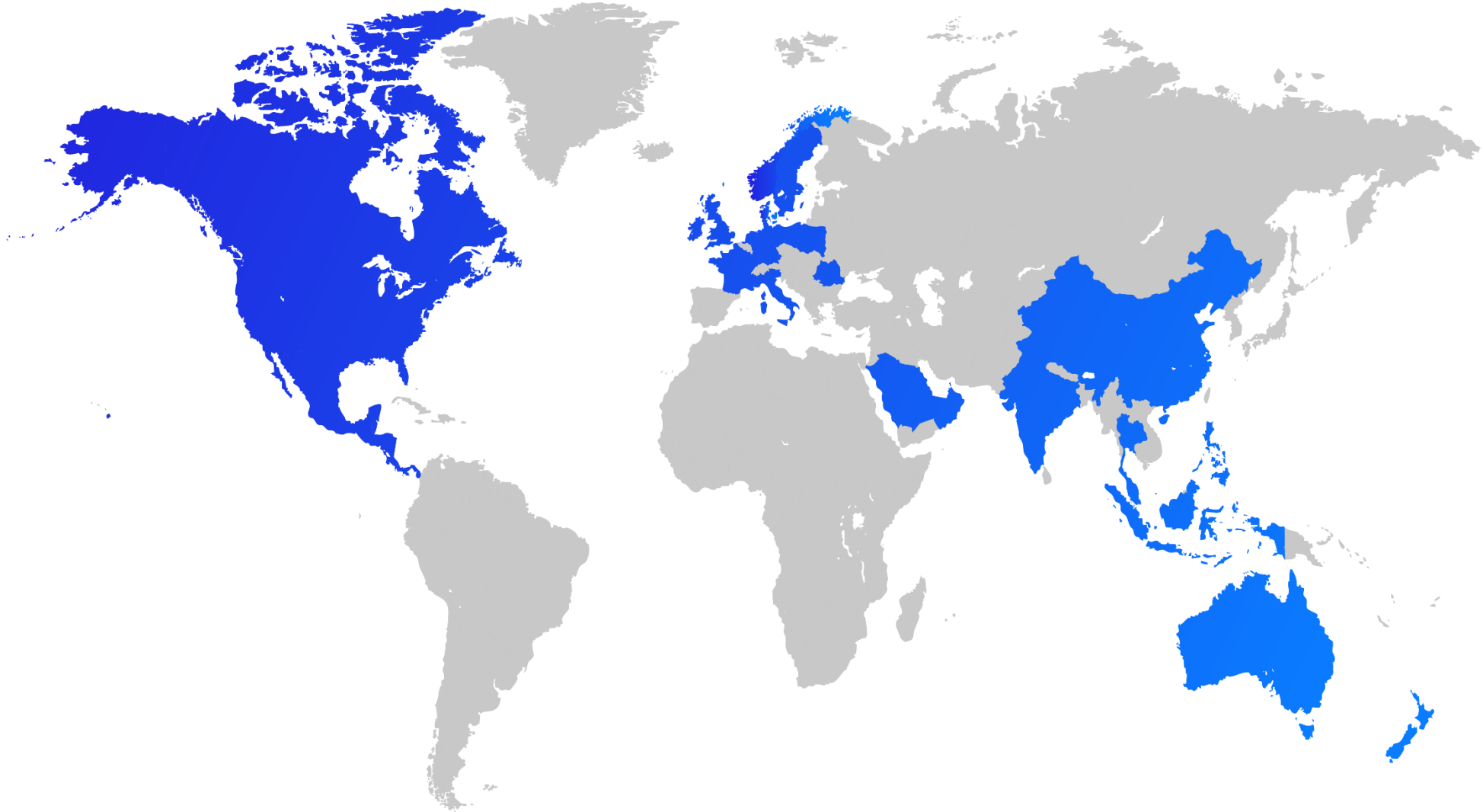
#1 Wastewater Treatment
Sanitary and Storm Sewers

Top 500 Design Firms 2021 Engineering News Record

#3 Water Treatment, Desal Plants
Water Supply



Where We Work

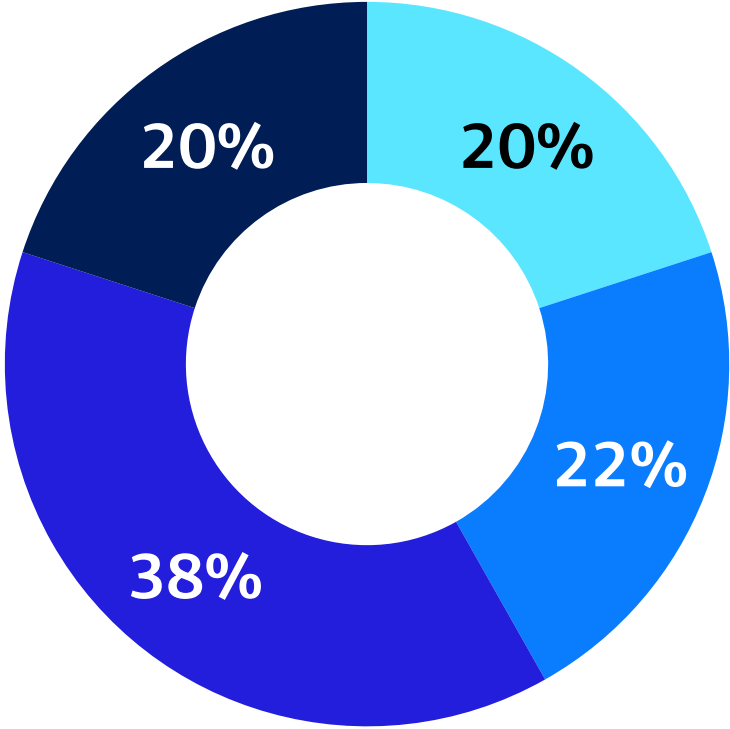


- Philippines
- New Zealand
- Singapore
- United Kingdom
- Poland
- Sweden
- Norway
- Denmark
- Finland
- Ireland
- Saudi Arabia
- United Arab Emirates
- Oman
- Qatar
- Kuwait
- Bahrain
- United States
- Canada
- Rest of North America
- India

Water Offerings by Solution Area and Key Opportunities/Challenges

- OneWater
- Digital Water
 - Machine Learning, Artificial Intelligence
- Resiliency
 - Climate Change
- Water/Energy Nexus
- Regulatory Challenges
- Emerging Contaminants

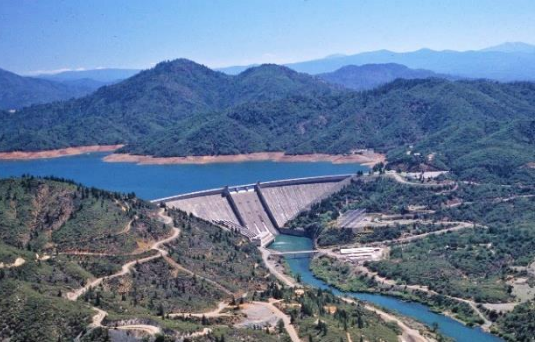
- More focus on Water Quality in America with Biden Administration



■ Conveyance & Storage ■ Drinking Water & Reuse
■ Wastewater ■ Water Resources

Source: Jacobs FY2020 net revenue

Market Drivers



Traditional Drivers

- Water scarcity
- Population growth
- Urbanization
- Aging infrastructure
- Aging workforce
- Recent and emerging regulations
- Water/energy/food nexus
- Our water practice covers complete water cycle

Accelerator

Climate change-induced extreme weather events



How We Deliver

FY20 Revenue

- Consulting - 74%
- Design Build - 9%
- Operations and Maintenance - 17%

Consulting



Miami Ocean Outfall
Legislation Program
\$2B Program

Design Build



Midland, Texas, Pioneer
Water Pollution Control Plant
\$134M

Operations and Maintenance



Wilmington, Delaware
WWTP and Collection System
\$20M per year for 20 years

Other Solutions and Technology Services Delivered to Jacobs' Water Clients

Environmental

- PFAS

Strategic Consulting

- Social Equity Advisory
- Asset Management
- Commissioning and Energy Efficiency

Tunneling and Ground Engineering

Cities and Places

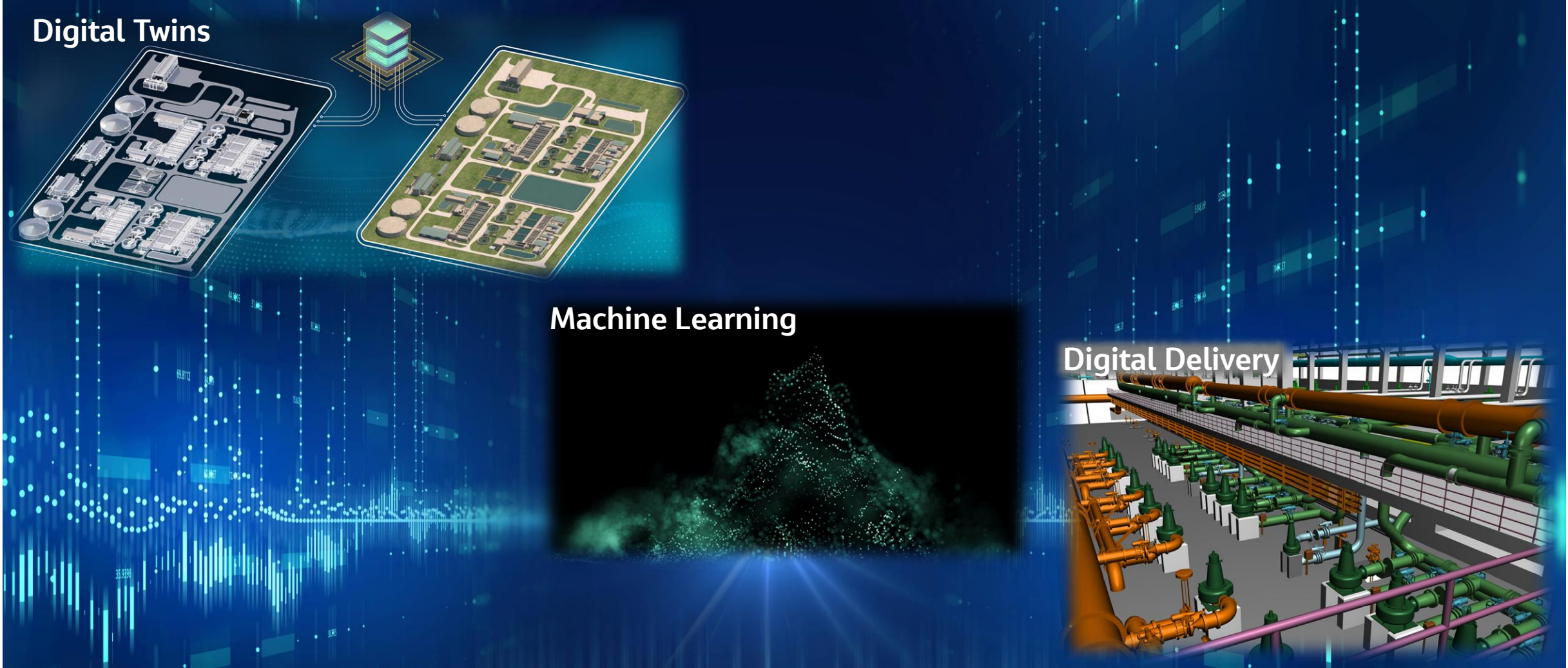
- Place Making

Digital Solutions

- Digital Twins
- Machine Learning/AI
- Digital Delivery



Leveraging Digital for Growth





Water for All : Conserve, Value, Enjoy

Water is essential to life and **OneWater** integrated management is one of the most impactful ways to address the complexities of the **water-energy-food nexus** and ensure social equity, health, and economic growth.



Singapore's Tuas Water Reclamation Plant – securing the nation's water supply.



Rikers Island Redevelopment

Jacobs is conducting a study to determine the feasibility of constructing a new Wastewater Resource Recovery Facility and Renewable Energy Hub on Rikers Island.

This is the first phase of a 20-year program that will completely reimagine New York City's wastewater infrastructure and community landscape and serve as a catalyst for equitable and inclusive economic development.



Equitable & Inclusive Economic Development



Reducing Community Spread of COVID-19 Through Wastewater Monitoring



- Awarded a two-year contract from the Abu Dhabi Department of Energy for project management of a wastewater laboratory that will screen and detect for COVID-19 and other infectious diseases.
- The Wastewater Monitoring Laboratory will be the first of its kind aimed at developing a world-class facility for improving the health of the residents of a major city.
- By using real-time information to assess the prevalence of infectious diseases such as COVID-19 and other health conditions like diabetes and cancer, authorities will be able to monitor human health and prevent the spread of disease.

Environmental, Social, and Governance (ESG) Summary

A sustainable business model aligning purpose and vision with both growth and positive impact:

- Fully integrating purpose with profit and operationalizing sustainability across all aspects of our business
- Drives how we can have the biggest positive impact for society as a business
- Jacobs' full suite of solutions to play a key role in advancing a net-zero economy
- ISS environmental and social scores significantly improve; annualized ESG related revenue ~\$5 billion

[Jacobs ESG Investor Page](#)

[2020 ESG Data Disclosure for Analysts](#)

[Environmental and PFAS Overview](#)

[Water Business Overview](#)

- Achieved **100%** renewable energy for our operations in **2020**.
- Achieved **net-zero carbon** for our operations and business travel in **2020**.
- **Carbon negative** for our operations and business travel by **2030**.

Jacobs' [Climate Action Plan](#)

Member of

**Dow Jones
Sustainability Indices**

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Thank You

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Reinventing tomorrow.



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