**THE WATER MARKET – USERS AND UTILITY SPEND**

**World Water Consumption by Use**
- Agriculture: 11%
- Industrial: 20%
- Municipal: 69%

**Developed Countries Water Consumption by Use**
- Agriculture: 41%
- Industrial: 16%
- Municipal: 43%

**Utility Spend**
- Oil: $70 per barrel
- Petrol: $190 per barrel
- Bottled water from your local supermarket: $130 per barrel

**Utility CAPEX**
- Chemical: $140 per barrel
- Water: $90 per barrel
- Oil: $70 per barrel

**Utility OPEX**
- Chemical: $10 per barrel
- Water: $10 per barrel
- Oil: $10 per barrel

**THE 'VALUE' OF WATER CHALLENGE**

- For $1 per barrel fresh drinking water to every house of the country at the turn of the tap.

**COST COMPARISON**

- $200 per barrel for Oil and Petrol

**MARKET DRIVERS**

- Traditional Drivers
  - Water scarcity
  - Population growth
  - Urbanization
  - Aging infrastructure
  - Aging workforce
  - Recent and emerging regulations
  - Water/energy/food nexus

- Accelerator
  - Climate change – induced extreme weather events

**JACOBS' GLOBAL LEADERSHIP - TECHNOLOGY**

- Long-term investment in technology organization
- Senior technology subject matter experts and icons
- Technology career path
- Portfolio of technology ‘firsts’
- Investment in proprietary processes and modeling tools

**JACOBS’ WATER BUSINESS PROFILE**

- Consulting/Design: 44%
- Design/Build: 22%
- Operations: 34%

**JACOBS END-TO-END SOLUTIONS**

- All water users
- Services across the entire water cycle
- Full service delivery platform

**MARKET DRIVERS**

- Traditional Drivers
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**JACOBS’ GLOBAL LEADERSHIP - TECHNOLOGY**

- Strategy & Growth
  - Talent Management
  - Thought Leadership
  - Drive Innovation

- JACOBS' LEADERSHIP POSITION

- Top 500 Design Firms 2016 Engineering News Record (ENR)
- #1 Design Firm
- #2 Water Supply

**JACOBS’ GLOBAL LEADERSHIP - INNOVATION**

- Technology career path
- Senior technology subject matter experts
- Long-term investment in technology organization
- Portfolio of technology ‘firsts’
- Investment in proprietary processes and modeling tools

**JACOBS’ WATER PROFILE - DELIVERING SOLUTIONS FOR A MORE CONNECTED, SUSTAINABLE WORLD – May 2019**
SUMMARY

- Large, global and fragmented market
- No one has dominant market share
- Market drivers lead to continued and sustained growth
- Opportunities to grow
  - Leverage Jacobs' industrial client relations
  - Leverage Jacobs' global footprint
  - Diversify delivery platforms outside U.S.
  - For room market share growth in U.S.

EXAMPLE ACTIVE PROJECTS

Thames Tideway Tunnel
Thames Tideway Tunnel Ltd, London, UK
- Program management of the design and construction
- Two 24-foot diameter tunnels totaling approximately 20 miles in length
- 11 connection tunnels
- 350-foot deep, 413 mgd pump station to store and transfer treated flows to a wastewater treatment plant
- 300 work packages and over 60 construction contracts
- Linked with over 30 local communities to meet stringent environmental requirements
- Delivery connected to a P3 with our program management team, a核实 part of the deal

Northeast Water Purification Plant
City of Houston, Texas
- Largest progressive design-build of its kind in North America – 300 mgd
- Treatment challenges include variable raw water quality and a small facility footprint to minimize cost and construction time
- Procurement and subcontracting approach to achieve lower construction costs - informed bid packages and transparent and competitive bid processes
- Phase design-build approach allows the project to be implemented in phases to meet funding/budget requirements

JACOBS: INDUSTRY LEADER POISED FOR GROWTH

New Jacobs (post ECR sale)

<table>
<thead>
<tr>
<th>U.S./Int'l Mix</th>
<th>Public/Private Sector</th>
<th>Talent Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>70%/30%</td>
<td>64%/36%</td>
<td>~50,000</td>
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Reimbursable and Low Risk Fixed Price Services ~92%

Public / Private Sector 53% / 47%

Jacobs and CH2M revenue synergies accelerating

Industry leadership at scale across key sectors

Digitally-enabled solutions continue to be a differentiator

Jacobs and CH2M revenue synergies accelerating

Strategy Shaping Early Results

- Industry leadership at scale across key sectors
- Digitally-enabled solutions continue to be a differentiator
- Jacobs and CH2M revenue synergies accelerating

Recent Customer Wins

- U.S. Dept of State, Bureau of Overseas Buildings Operations
- City of Tampa Water Treatment Facility
- Global Digital Master Plan
- Confidential Client Vaccines Manufacturing Facility – U.S.
- Confidential Client Microprocessor Manufacturing – U.S.

BUILDINGS, INFRASTRUCTURE AND ADVANCED FACILITIES (BIAF)

JACOBS' WATER PROFILE - DELIVERING SOLUTIONS FOR A MORE CONNECTED, SUSTAINABLE WORLD – May 2019

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