

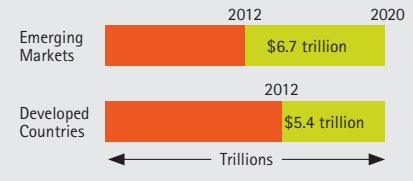


Seven Trends Transforming the Construction Marketplace

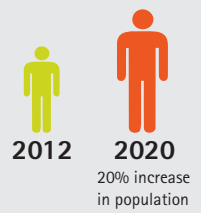
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1 Accelerated Globalization

Global Construction 2020 research shows emerging markets will double in size over the next decade to a projected \$6.7 trillion; developed countries will grow 36%.



2 Urbanization: Emergence of the Megacity



23 megacities projected for 2015. (That's population > 10 million). This boosts construction globally—and opportunities for strategic integration across traditional infrastructure silos.

3 Challenging Access to Capital



- Strong private financing will drive growth globally.
- Capital investors will look for profitable operations with minimum risk and limited leverage.
- Opportunities will increase for strategic alliances with banks and funds as well as diversification in the upstream value chain.

4 War for Talent



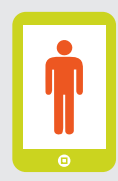
- Markets' challenge: Hiring and keeping skilled resources.
- Developing countries' challenge: Changing demographics, aging workforce.
- Construction companies in emerging and developed markets will compete for qualified talent.

5 Energy: the Upcoming Crisis



- Consumption of renewable energy will grow faster than primary energy.
- Need for broader, more efficient infrastructures.
- Growth opportunities for core construction businesses.
- Opportunities to diversify within the energy landscape.

6 New Technologies Driving Innovation



- New technologies enable the reinvention of buildings and infrastructure.
- Increased use of premanufactured modules.
- Improved infrastructure monitoring for predictive and corrective maintenance.
- New modeling systems for post-construction plans.

7 Higher Standards of Sustainable Living



- Increased populations will mean increased responsibility—for public health and sustainability.
- Growth in demand for good water and waste management.
- Aging populations will increase need for health services globally.
- Smart mobility needed for intelligent cities.



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