

Sustainable Building as a Company's Guiding Principle

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Combating Climate change: A challenge for the construction industry

- With sustainable building, our industry...
 - ... reduces greenhouse gases
 - ... reduces waste
 - ... helps create healthy, productive environments
 - ... serves the environment, users, owners, investors
 - ... creates a positive impact on economy and profitability
- The creative potential is still largely untapped.
- Public opinion does not give proper credit for our contributions.
- We need to fully realize the industry's potential in the field of sustainable building.
- Construction and operation of buildings account for 40-50 % of the overall consumption of resources



Facing the challenge: The HOCHTIEF Group

- Founded in 1873
- Fifth-largest construction services provider in the world
- 64,500 employees worldwide
- Represented in all the world's major markets
- Integrated portfolio:
Development, construction, services, concessions and operation
- Service offering covers the entire life cycle of infrastructure projects, real estate and facilities



Our response to the challenge: “Ecological equals economical“

We offer:

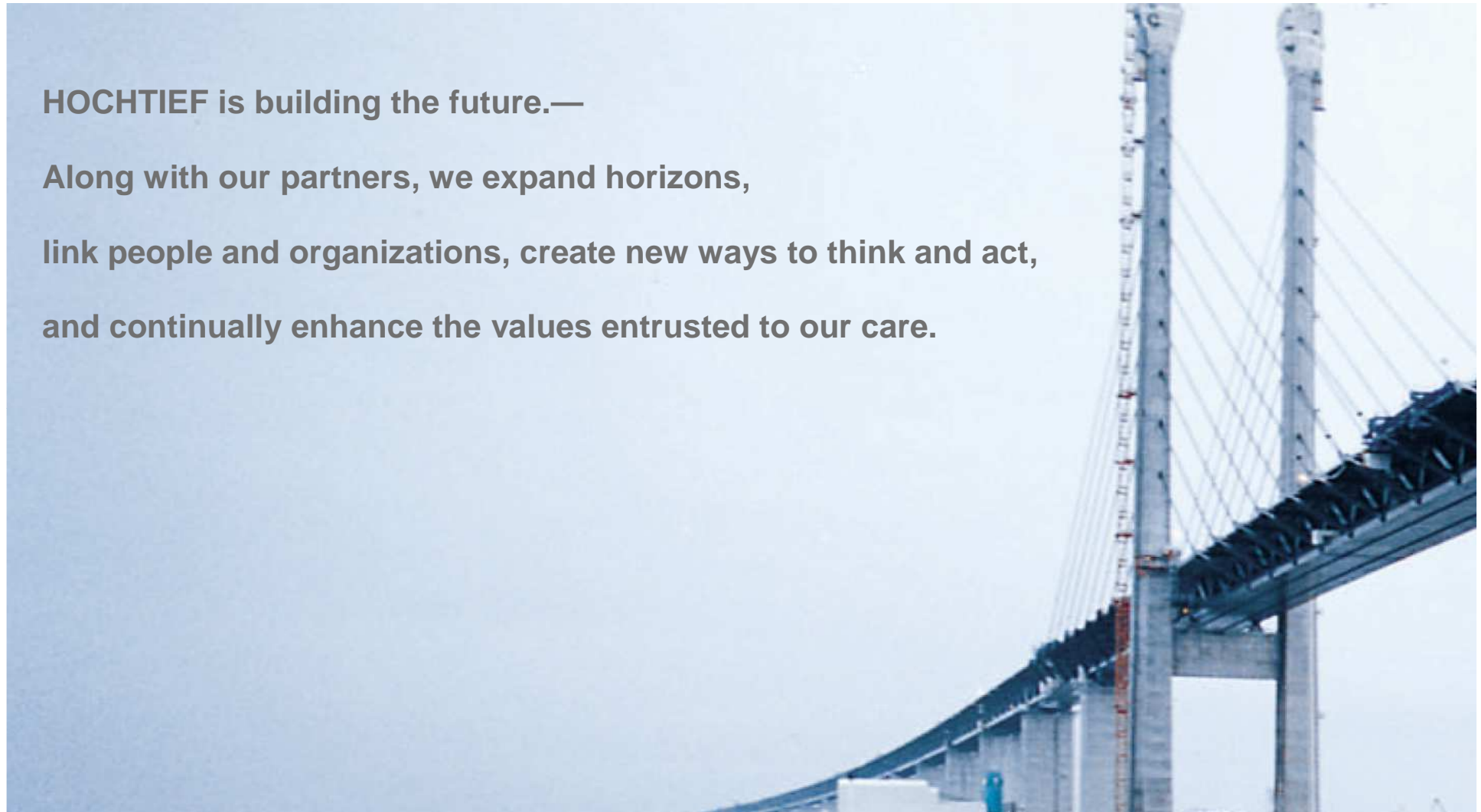
- A 360° holistic view of the life cycle – every phase counts
- Planning, building and operation with view to sustainability criteria
- Innovative technologies



Sustainability is part of our corporate vision

HOCHTIEF is building the future.—

Along with our partners, we expand horizons,
link people and organizations, create new ways to think and act,
and continually enhance the values entrusted to our care.



Our fields of sustainable action

- **General building:**
 - Development: efficiency begins with planning
 - Construction: green, sustainable building
 - Operation: energetic programs for facilities
 - Revitalization: Changes for a successful future
- **Infrastructure:**
 - Modernization of streets, reduction of traffic jams
- **Plant construction: Power stations**
 - Regenerative energy from sources such as wind parks, photovoltaic plants, geothermal systems



Shaping the future

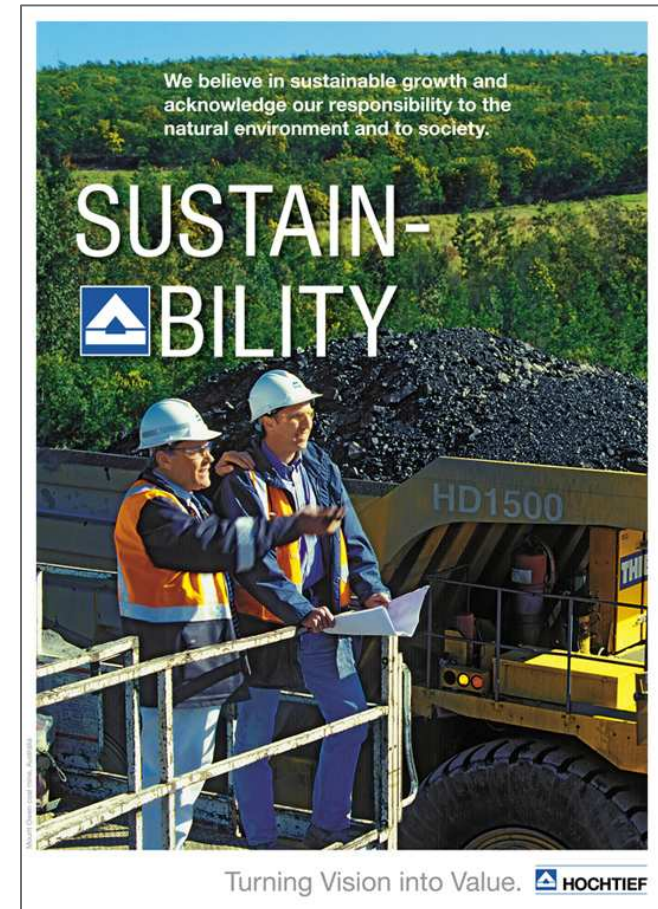
Our commitment to DGNB (German Sustainable Building Council)

- HOCHTIEF: Founder member of Deutsche Gesellschaft für Nachhaltiges Bauen
- Specialist and technical support
- Vice Chairman of DGNB
- HOCHTIEF buildings have already received the “German Certificate for Sustainable Building“
- Already five accredited DGNB auditors at HOCHTIEF



Strategic initiatives at HOCHTIEF

- Sustainable products and services
 - Active climate protection
 - Resource protection
 - Attractive working environment
 - Corporate citizenship
 - Compliance and ethics management
- We are working together to make a difference and to change the markets today – for tomorrow



Building the world for tomorrow...
... and for our children and grandchildren



Turner's Commitment to Green

Ongoing (since 2004)

- Construction Waste Recycling Program
- Green Training Program
- Increase LEED Accredited Employees
- Green Advisory Board
- Green Center of Excellence, Green Champions
- Active in USGBC

Operational Excellence

- LEED AP Assigned to Every Green Job
- All Subcontractors Must Take Green Training Program
- Green Operations Manual & Training

Corporate Sustainability

- All Future Turner Offices Will be LEED
- Reduce Green House Gas emissions as member of EPA Climate Leaders

Green Building at Turner 2009

- **More Than 400 Projects with Green Building Elements Completed or Under Construction**
- **\$28 billion**
- **101 LEED Certified Projects**
- **158 LEED Registered Projects**
- **More Than 1,100 LEED Accredited Professionals**

Growth of Green Building Volume

Sales Volume

- 17% in 2006
- 24% in 2007
- 30% in 2008
- 50% in 2009 (YTD)

Green Building Work-In-Place

- \$1.3 Billion in 2006
- \$1.8 Billion in 2007
- \$3.2 Billion in 2008

- *Engineering News-Record* Top Green Contractor 2007 and 2008

LEED Work-in-Place by Market Sector

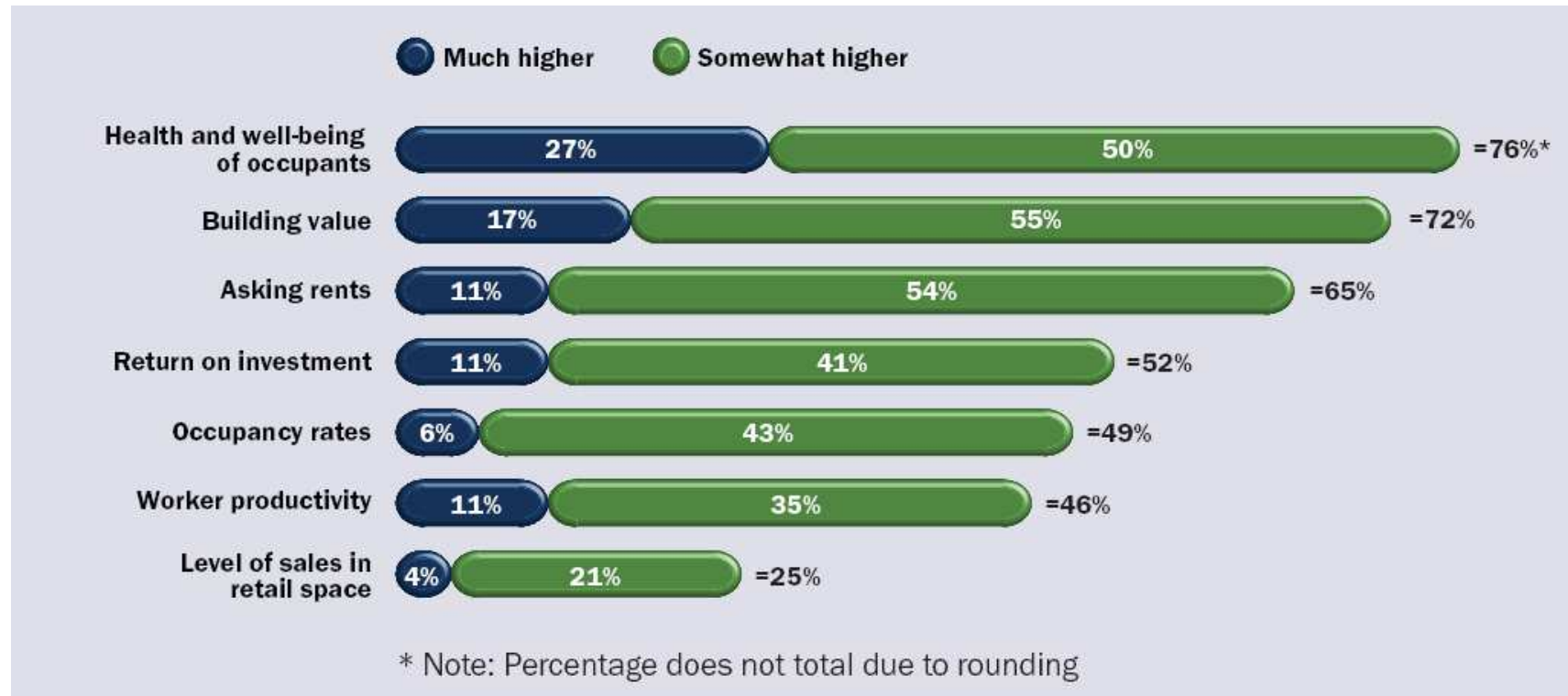
Sector	2007	2008
(#1) Commercial Office	\$481m	\$699m
(#1) Education	\$564m	\$870m
(#1) Healthcare	\$262m	\$663m
(#3) Government	\$184m	\$400m

The State of the Green Market

- **2007 – The year the market “got it” – a shift from “cost” to “value”**
- **2008 – Growth in every market sector - 80% of non-residential green construction is Commercial Office, Education and Healthcare**
- **2009 - Federal Stimulus – Public Sector with emphasis on energy efficiency and existing building retrofits**

Turner Survey

Benefits of Green Buildings



Turner Survey

Interest in Building Green

Likelihood of Seeking LEED Certification if Involved with a Green Building over Next 3 Years

Percent of Executives

Extremely Likely Very Likely Somewhat/Not Too/Not Likely



Value of LEED Certification

Percent of Executives

Extremely/Very Valuable Somewhat Valuable Not/Not Too Valuable



The State of the Market 2009

- **Green Building is still a good play even in a constrained market**

The Proof

- **50% of sales YTD are green buildings**
- **Our largest and most important projects are green buildings**
- **It is no longer a question of IF you will build green, but only a question of HOW GREEN will you build**