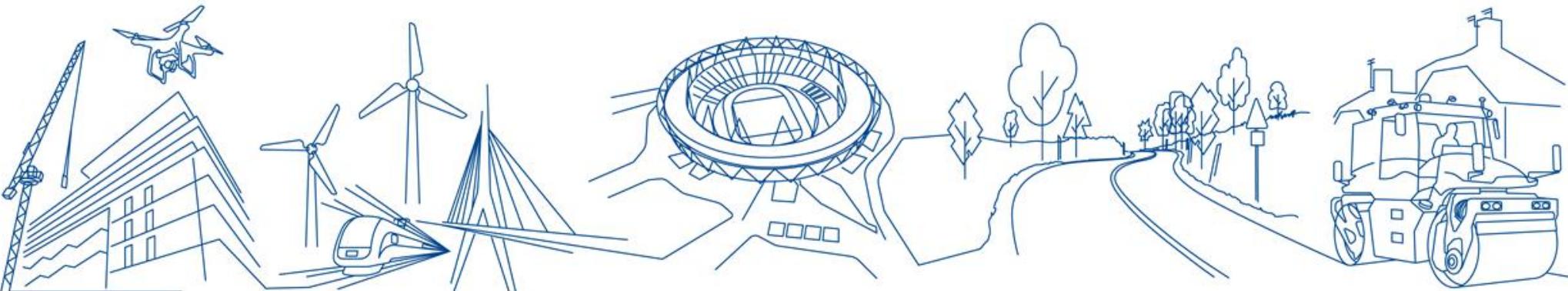


Leaders Forum

Welcome back

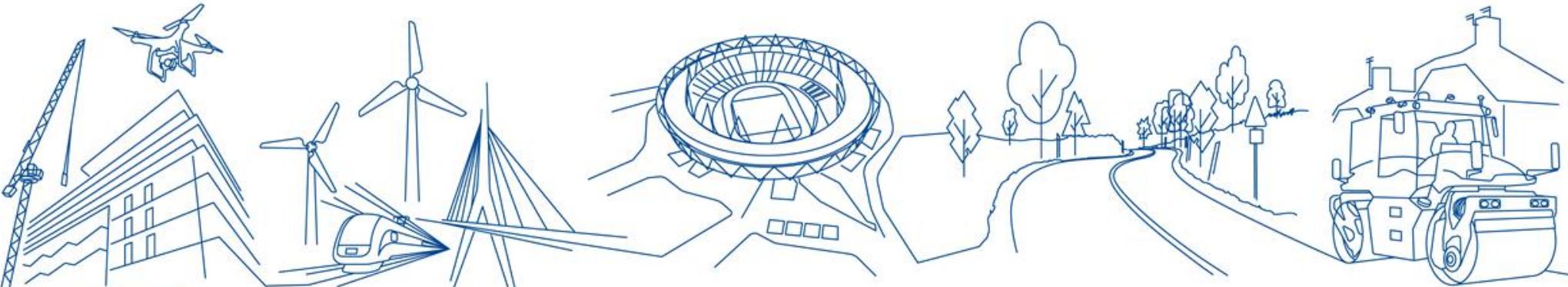
Slido code: #LFAPR25



Leaders Forum

Delegation Updates

VINCI Facilities, VINCI Building & Ringway

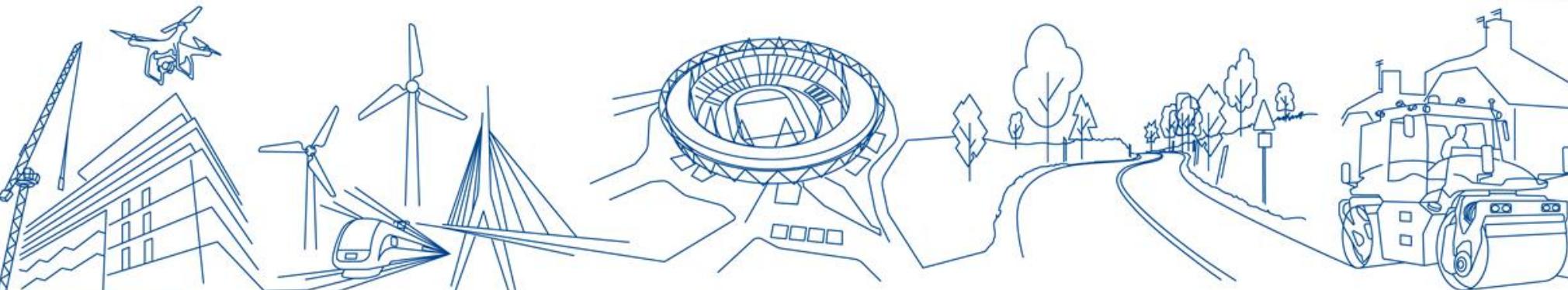




Leaders Forum

VINCI Facilities

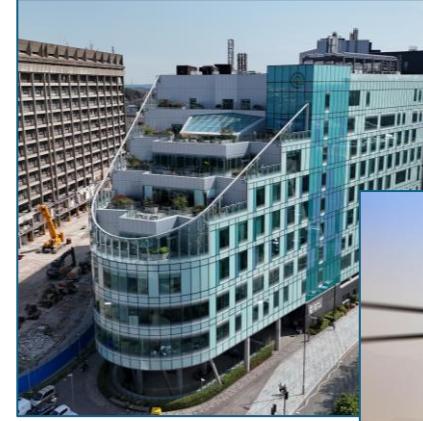
Paul Cottam



Running Order



2025 BR
Financial Budget



Reflect
Current Position



Changing Market
Adapting to Our Market
Strategic Ambitions
Transformation



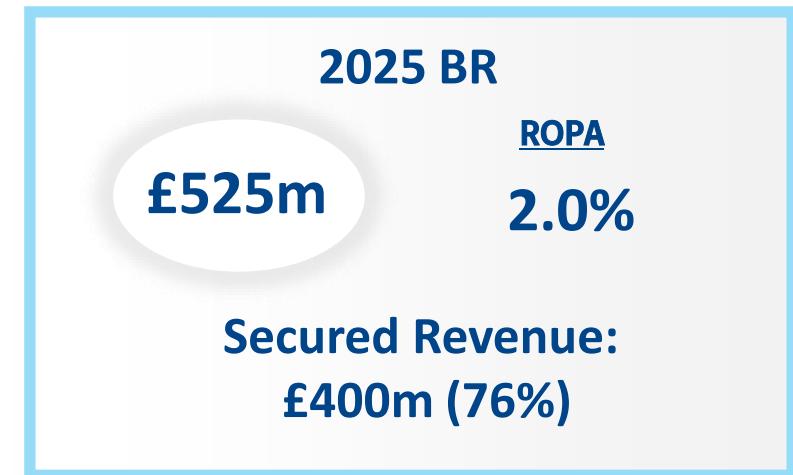
Future
2027-2035





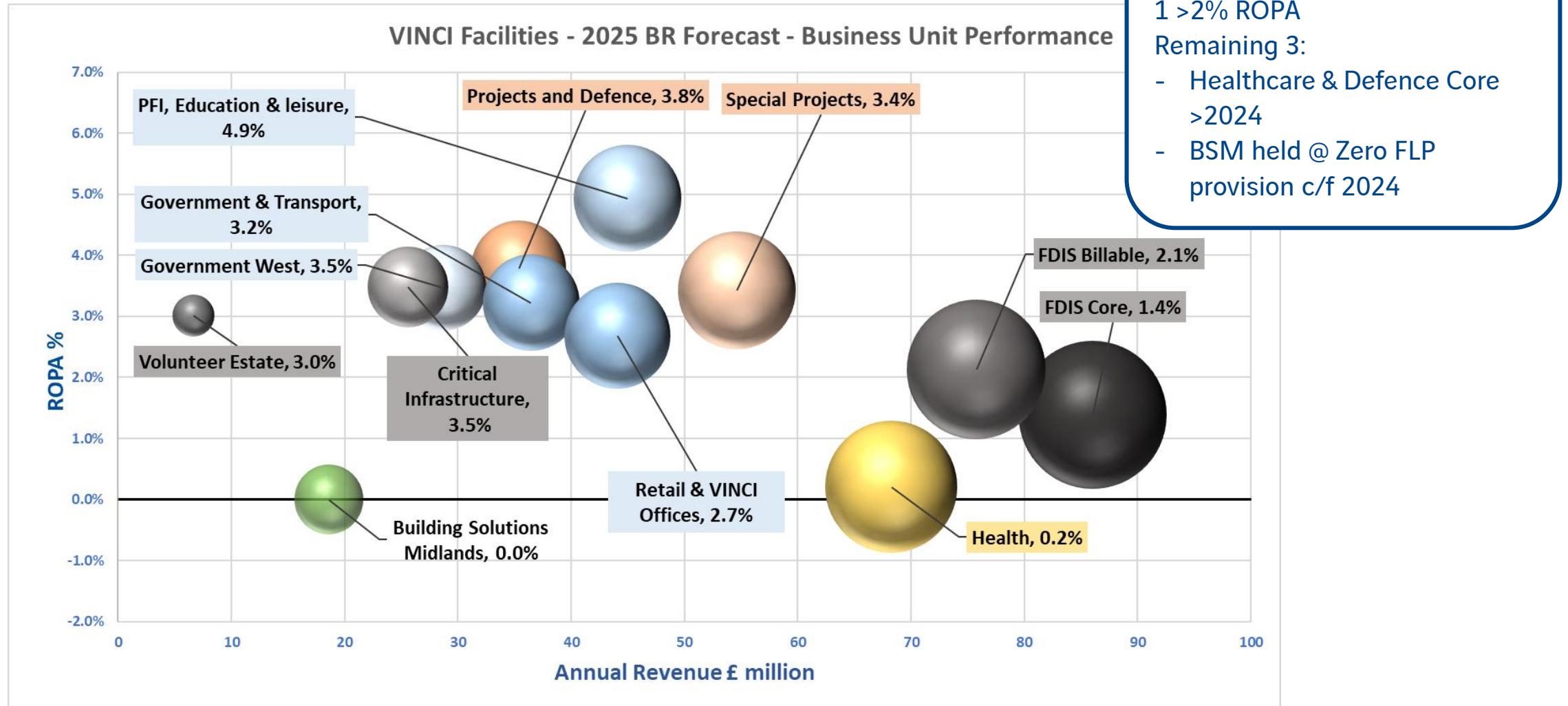
2025 BR Financial Budget Regions

	Forecast Revenues	Secured Year to date	Forecast ROPA
Defence	£194m	£157m	2.0%
FM	£154m	£118m	3.6%
BS	£90m	£54m	3.7%
Health	£68m	£56m	0.2%
BSM	£18m	£15m	0%
Total	£525m	£400m	2.0%





2025 BR Financial Budget Business Units





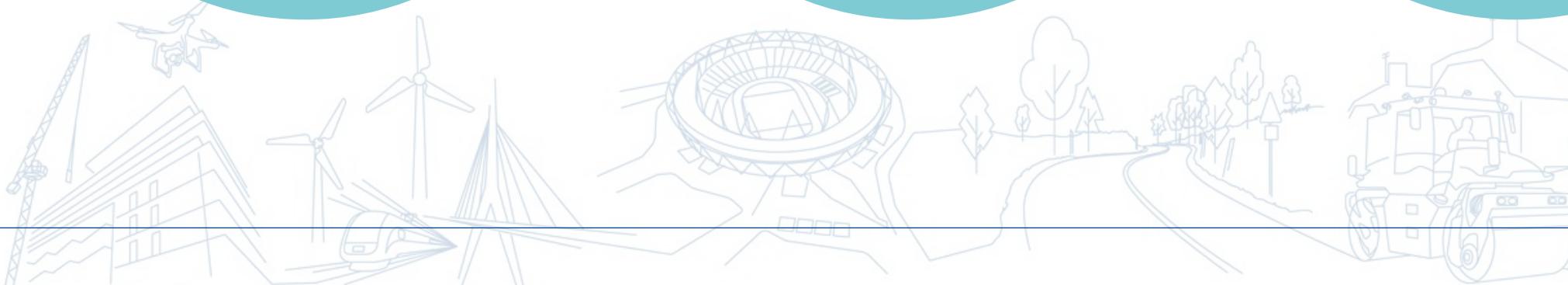
Reflect Current Position



Ministry
of Justice



Ministry
of Defence





Changing Market Adapting to Our Market

OPTIMISATION

Shape

INNOVATION

Move

TRANSFORMATION

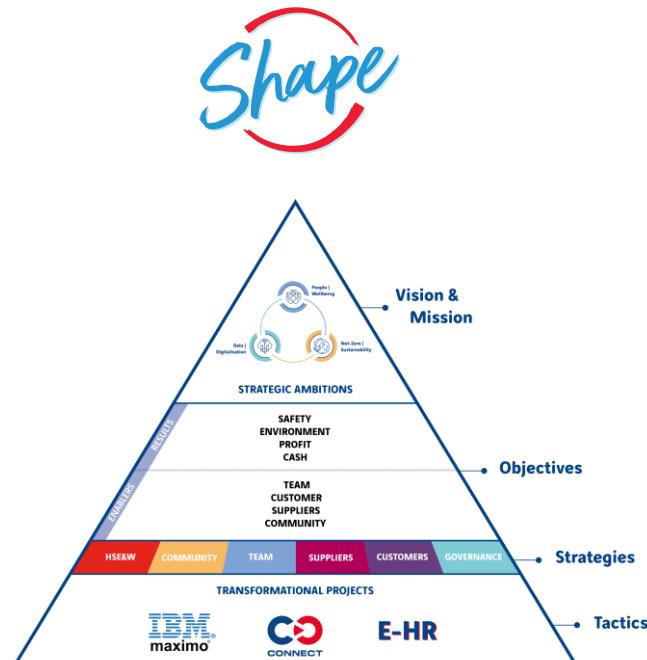
Shift





Changing Market Adapting to Our Market

OPTIMISATION



INNOVATION



TRANSFORMATION





Changing Market Strategic Ambitions



Our Vision for 2027-2035

Digital & Data Literate – Utilise our digital tools, including AI, across **all** Regions and Support functions

Recognition – Be recognised by our **peers and accredited bodies** for our asset performance understanding and future trend prediction through intelligent data use

Improved All-Round Performance – Achieve a **commercial return** on digital tool investments by boosting operational and financial performance

Productivity Improvements – Automate **most** repetitive tasks through process mining



Our Vision for 2027-2035

Career Development – Empower **all** employees to improve their skills, supporting our goal of becoming the leading and trusted expert

Wellbeing – Ensure wellbeing is considered as **important as safety** by everyone

Inclusion – Be recognised as **exemplars in 'Leaders in Diversity'**, where everyone's contribution is valued and respected

Change – Foster a **highly agile, adaptable, and mobile workforce** that views change as an opportunity for growth and development



Our Vision for 2027-2035

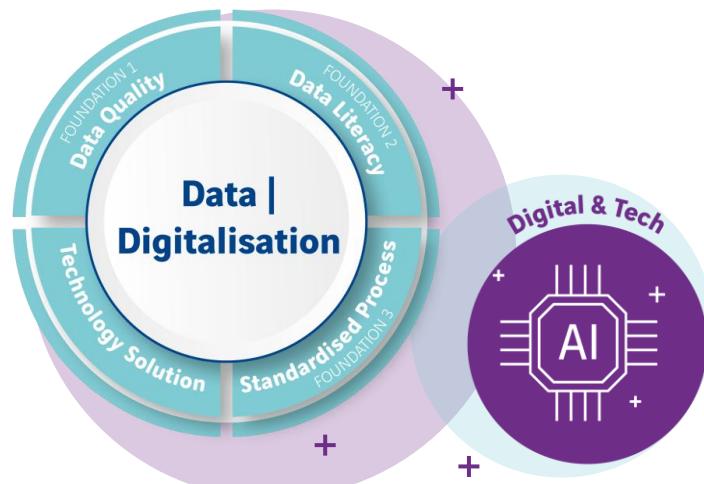
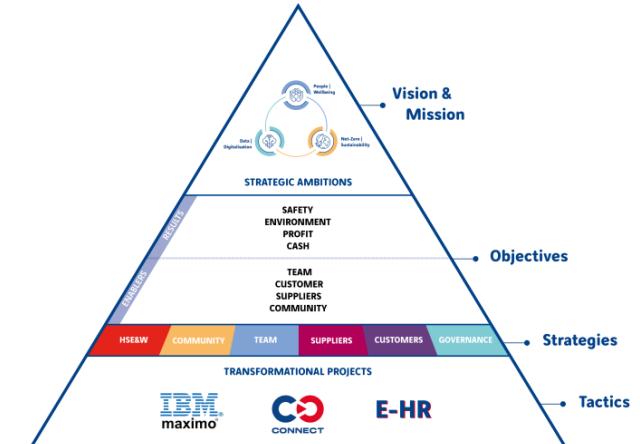
Social – Recognised by the communities we serve as **leaders** in social engagement and support

Net Zero – Achieve decarbonisation as '**Business-As-Usual**' in project delivery and establish V-Zero as an **industry leader** in the decarbonisation of the built environment

Environmental – To deliver a sustainability culture that identifies and addresses the behavioural impacts of the environmental decisions we **all make every day**

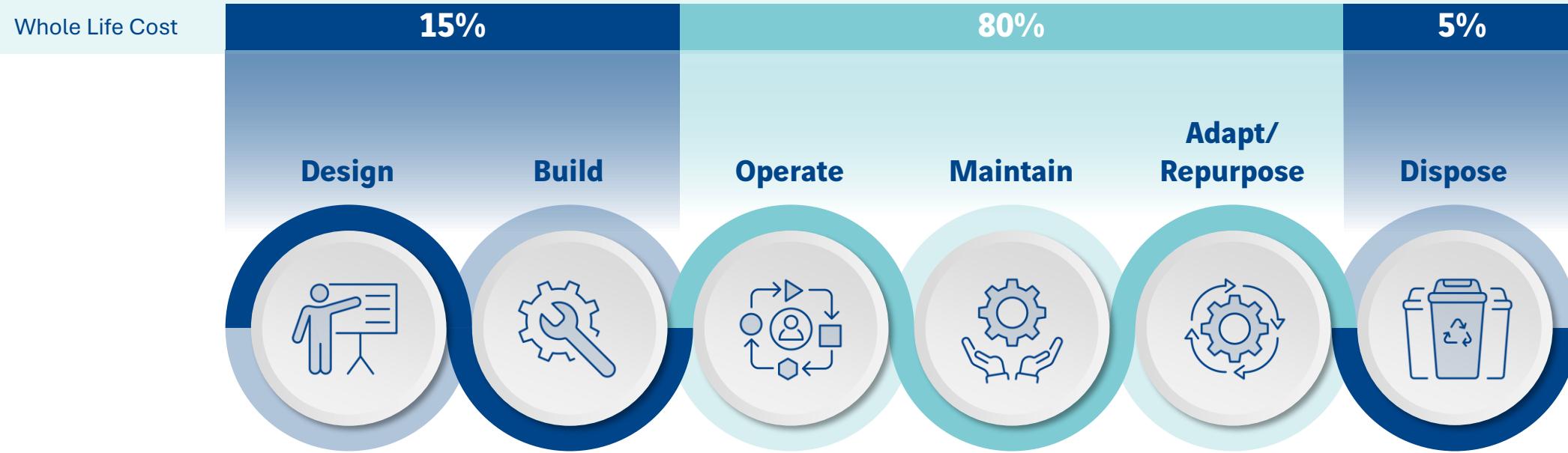


Strategic Ambitions Overview





Transformation Lifecycle of a Building





Transformation Lifecycle of a Building



Whole Life Cost	15%	80%	5%
-----------------	-----	-----	----

Total Carbon Footprint	36.5%	63%	0.5%
------------------------	-------	-----	------





Transformation Lifecycle of a Building



Whole Life Cost

15%

80%

5%

Total Carbon Footprint

36.5%

63%

0.5%

Design



Build



Operate



Maintain



**Adapt/
Repurpose**



Dispose



Net Zero by 2050

UK Government
commitment

25%

of UK total emissions are
from buildings in use

80%

of 2050 buildings
currently exist

**Facilities
Management &
Retrofit are crucial**



Transformation

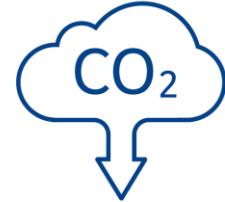
Targeted Impact Areas



Maintain



**DECARBONISED
BUILT
ENVIRONMENT**



Operate



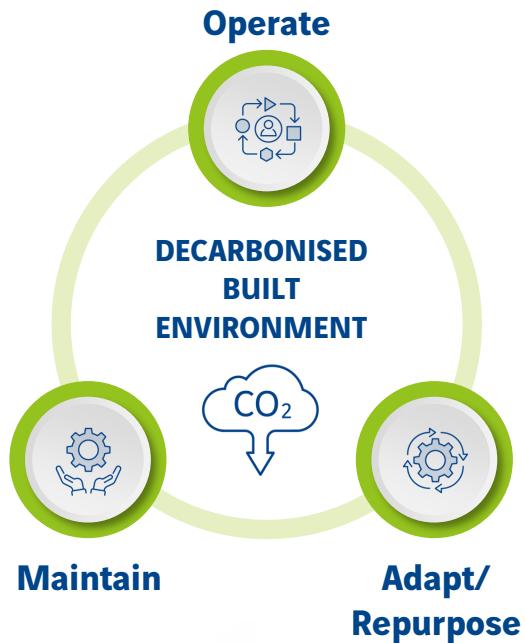
Adapt/
Repurpose



Retrofit
solutions



Transformation Net Zero Market Opportunity



Net Zero Economy in UK (2024)

+10%
from 2023

£83bn

Economic Value



Market Access Points

Existing Customers
Lifecycle Budgets & Utilities
Management

Frameworks
Retrofit, FM & Decarbonisation

Tenders
FM, Building Solutions &
Decarbonisation



Transformation

Operate



DECARBONISED
BUILT
ENVIRONMENT



Maintain



Adapt/
Repurpose





A Transformational Market Opportunity



Decarbonising the Built Environment
through Net Zero focused Facilities Management & Retrofit Solutions



For more information visit:

Horizon Entry - Search for 'V-Zero'

Market Stall - With Head of V-Zero, Paul Lynch



Future 2027-2035

We will continue to be leaders in the future of facilities management, delivering comprehensive and data-driven solutions for clients across various sectors through:

OPTIMISATION



INNOVATION



TRANSFORMATION





Future 2027-2035

OPTIMISATION



INNOVATION



TRANSFORMATION





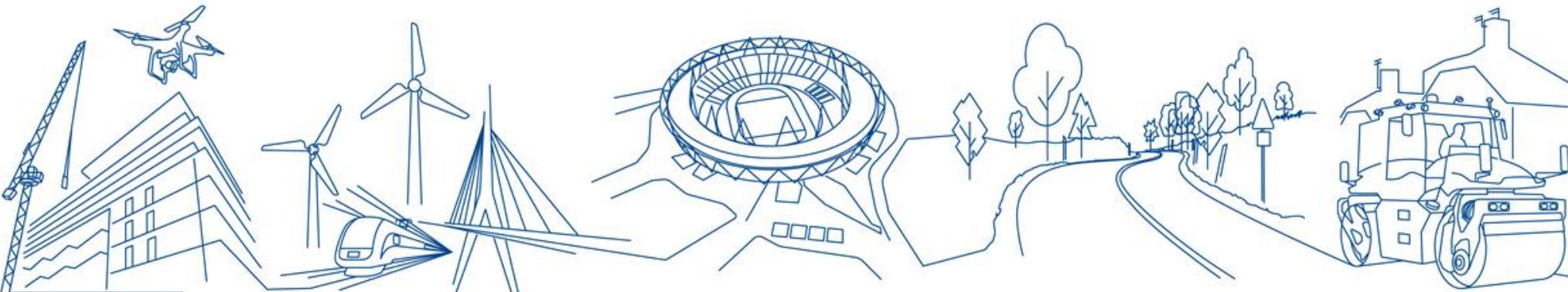
UK



Leaders Forum

VINCI Building

John Roberts



Team spirit

2025



£502m turnover

81% secured



£10 million
turnover per week
1.8% ROPA



44 Projects on site



2 Projects handed
over per month



635 staff



GARRY BOWKER
Regional Managing Director

NORTHERN BUSINESS UNITS



GARY HUGHES
North West



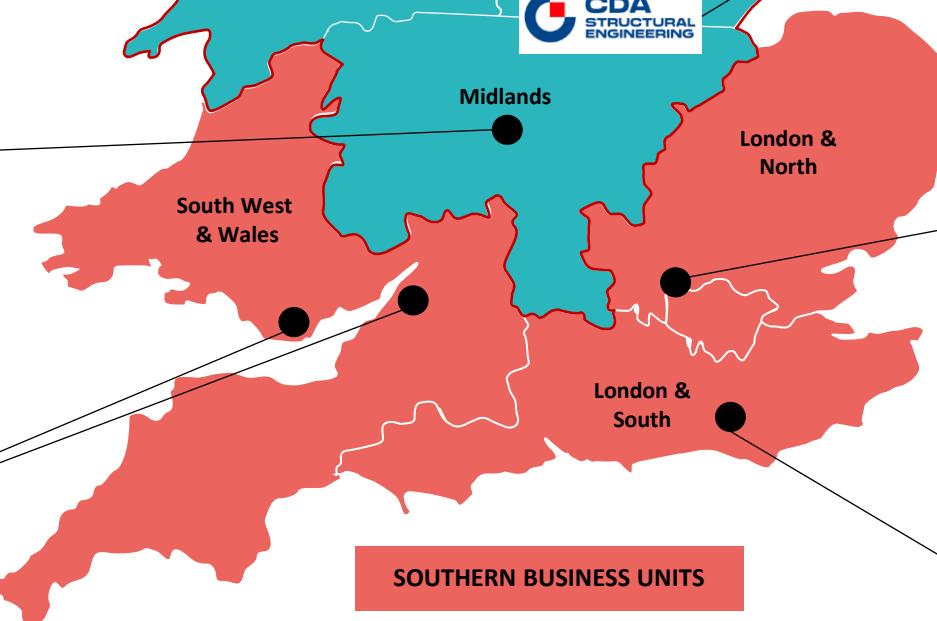
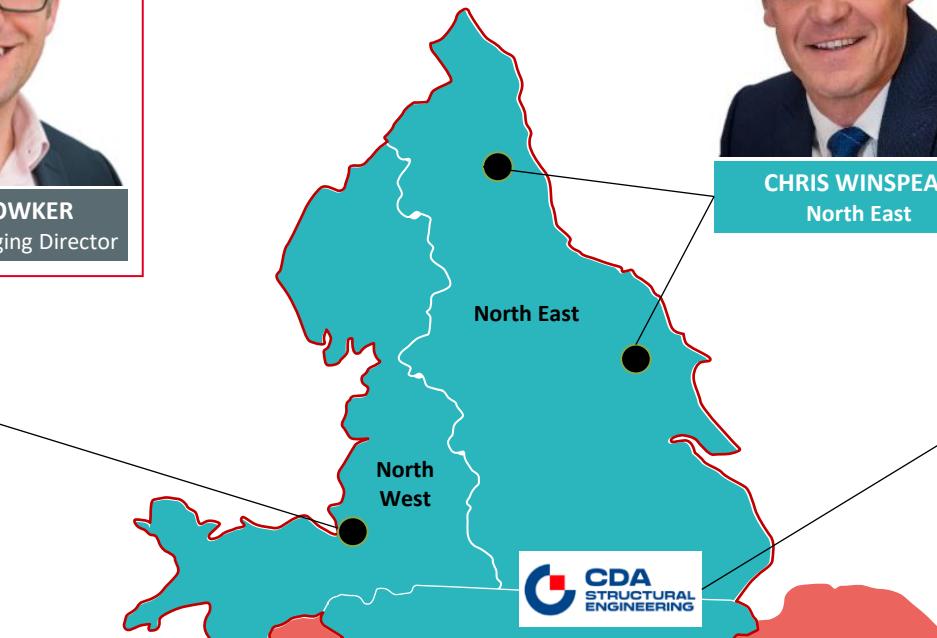
CHRIS WINSPEAR
North East



NEIL DARROCH
Cameron Darroch Assoc



TONY GRINDROD
Midlands



CHRIS EVANS
South West & Wales



JASON GRIFFITHS
London & South

SOUTHERN BUSINESS UNITS

Excellence



Our Sustainable Business Plan 2025



VMOST

OUR SUSTAINABLE BUSINESS PLAN 2025

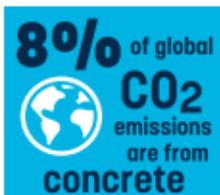
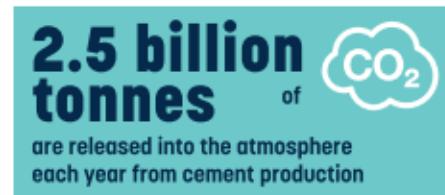
VISION	Build Better Together is at the heart of all we do to become our client's first choice.			<i>Build Better Together</i>
MISSION	Safely deliver profitable, high-quality projects that make us proud and positively impact our people, partners, communities and environment.			
OBJECTIVE	PEOPLE	PROJECTS	PARTNERS	PLANET
	Attract, retain and develop our people	Deliver profitable, high-quality projects safely	Look after our clients and supply chain	Deliver our environmental ambitions
	Look after our people and recognise their value	Deliver an excellent safety culture	Add value within our communities	Acting for the climate
	Treat everyone with fairness, inclusion and respect	Improve profit & cash	Procure sustainably	Optimising resources for a circular economy
	Uphold our values and behaviours	Deliver projects on time	Maintain a healthy pipeline of opportunities	Preserving natural environments
	Increase our self-delivery capability	Improve productivity through innovation	Support our industry partners	Aligning governance and behaviours
	Employee Survey Action Plans	2025 Improvements	Business Development Bi-Annual Review	Environmental Ambition Roadmap
	Fairness Inclusion and Respect		Supply Chain and Self Delivery Strategy	Business Unit Environmental Action Plans

Why do we need Low Carbon Concrete?

Concrete is the second most used substance on the planet, behind only water.



Globally, over 10 billion cubic meters of concrete are used each year and with that, there is a cost:



One of the steps VINCI Construction is taking towards achieving the sustainability goals is to implement the wider use of low carbon concrete (LCC). In parallel to this, VINCI has been developing a capacity to design and implement in-house concrete solutions, called EXEGY. These LCC solutions result from an integrated approach which leads to the most optimised LCC performance technically, environmentally and economically.

exegy
LOW CARBON

exegy
ULTRA LOW CARBON

EXEGY's target is to significantly reduce CO₂ by using LCC on 90% of VINCI's worldwide projects.

VINCI'S LOW CARBON CONCRETE CHARTER

As a world leader in concessions, energy and construction, VINCI are at the centre of the challenges facing today's world. Its "environmental ambition for 2030", is focused on three priority areas: acting for the climate, optimising resources through the circular economy and preserving natural environments. In 2023, 21% of the 186,660 tonnes of concrete used across our UK operations was Low Carbon Concrete. To improve the usage of Low Carbon Concrete, all the undersigned VINCI businesses make the following commitments:

1. Specify and use Low Carbon Concrete on all of our projects, subject to Client approval.
4. On site quality testing as normal to prove the technical performance.
2. Match our project locations and requirements to ensure that there is sufficient Low Carbon Concrete capacity.
5. Publish case studies on the use of Low Carbon Concrete on our projects to disprove some of the myths regarding productivity, cost and performance.
3. Use our interactive and searchable heatmap of all UK Low Carbon Concrete suppliers to enable our project teams to locate the suppliers closest to their project and agree develop the appropriate specification and delivery requirements.
6. Report on our performance against the business targets.
7. Raise the awareness and increase the use of Ultra Low Concrete solutions in particular our Exegy® product range in the UK.



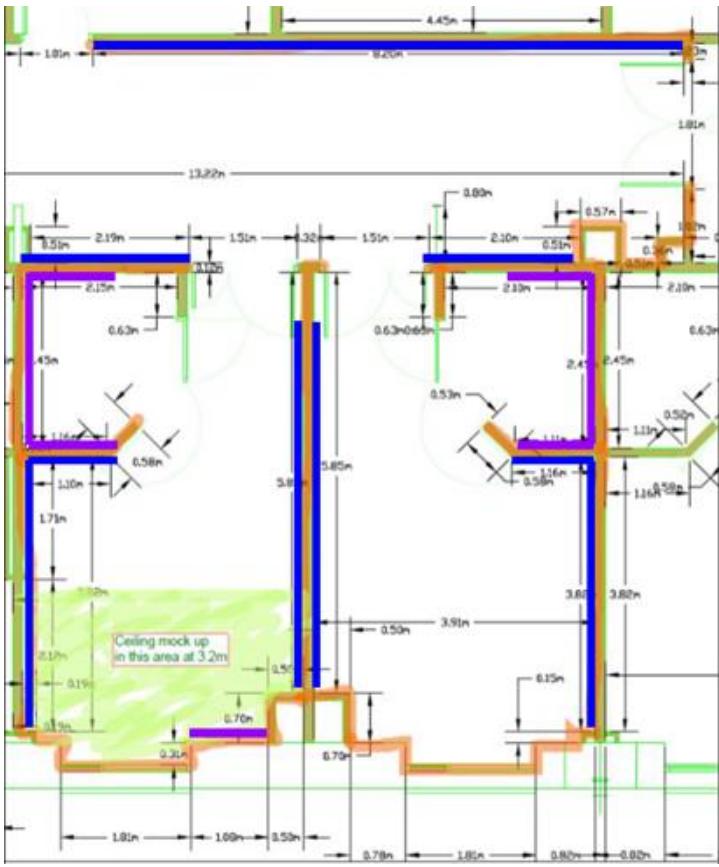


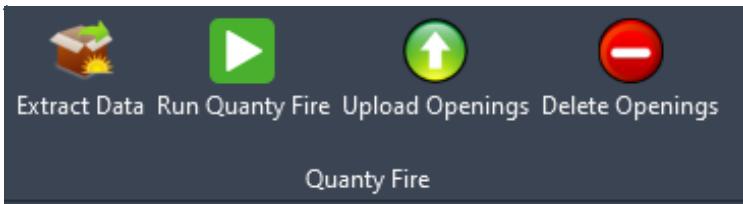
Tower Cranes at Sheffield Forgemaster

VINCI
BUILDING



Entrepreneurship





Current Functions

The screenshot shows a CAD application window with a 3D view of a building model. The interface includes a top menu bar with File, Architecture, Structure, Steel, Preest, Systems, Insert, Annotate, Analyze, Measuring & Site, Collaborate, View, Manage, AddIns, Inspect, Interoperability Tools, BIMtools, Data, DiffTools, Quanty Fire, and Modify. On the left, there's a Properties panel for a '3D View (0.0)' and a Project Browser titled 'TestModel' listing various project components like Views, Families, and Detail Items. A large 3D wireframe of a multi-story building is displayed in the center. A callout with a red arrow points from the 'Entrepreneurship' text on the left towards the building model.

Entrepreneurship

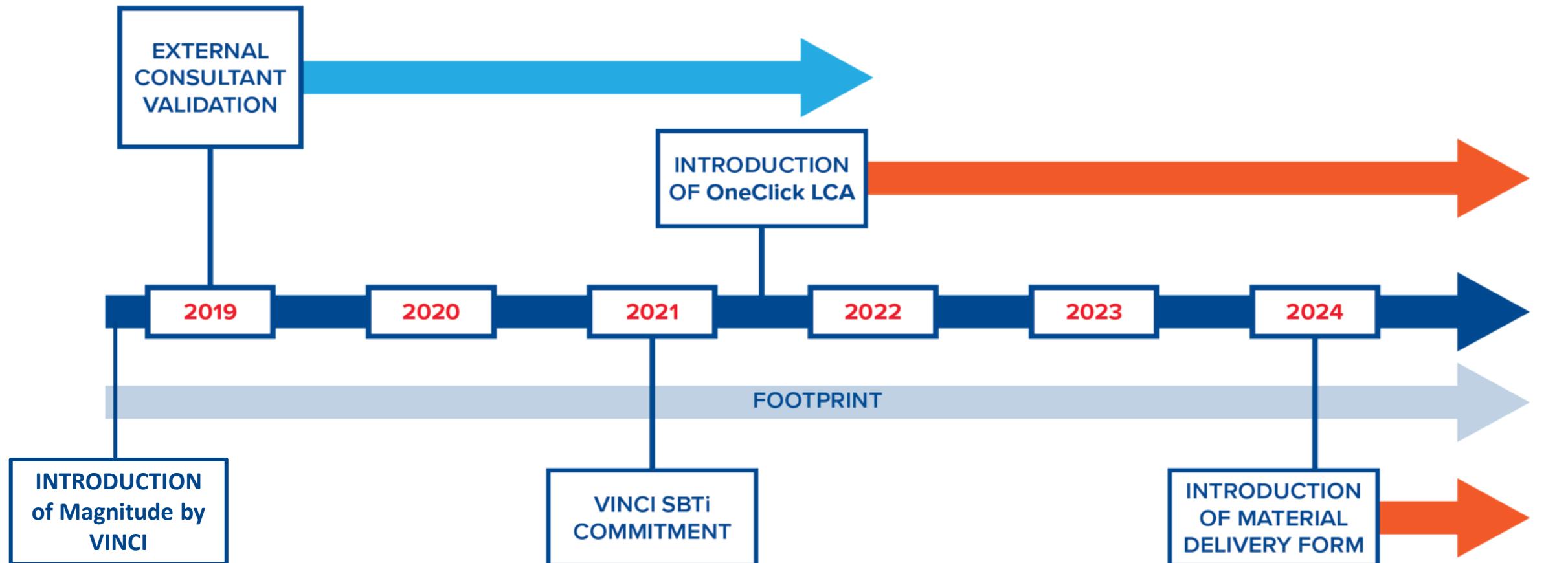


DRIVING QUALITY
DELIVERING EXCELLENCE

Excellence



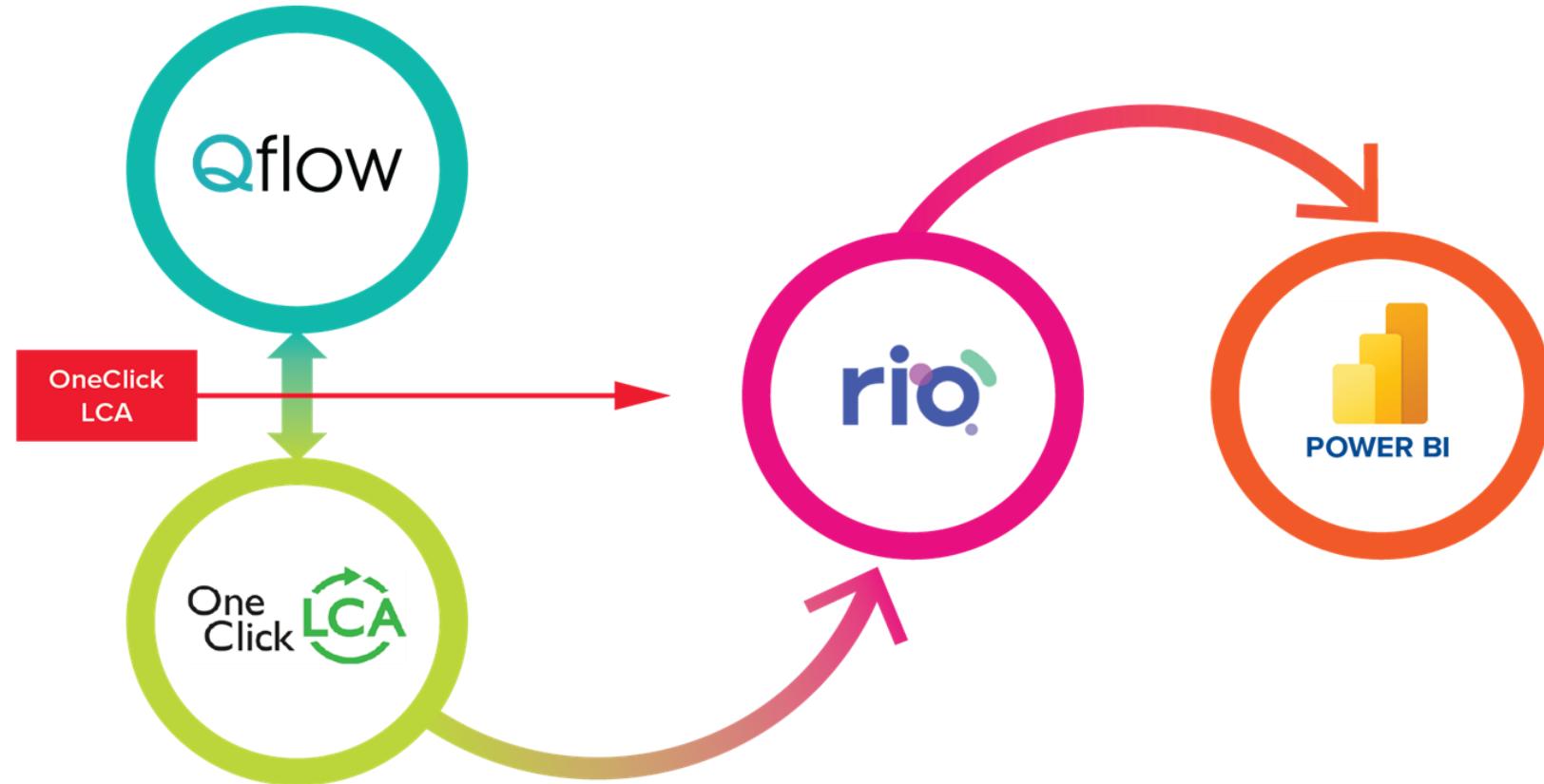
CARBON DATA STORY - HISTORICAL



Excellence

VINCI
BUILDING

CARBON DATA TRANSFORMATION – ASPIRATION



Humility



EMPLOYMENT MILESTONES RECOGNITION SCHEME

Principles

VINCI Construction appreciates the invaluable contribution made by our employees and we wish to recognise and reward loyalty, motivation and experience.

We recognise both Long Service and Retirement as significant Employment Milestones and provide the following awards for each, subject to the eligibility criteria and rules outlined below.

Long Service Milestone Awards

Eligibility Criteria

Employees engaged on standard VINCI Construction terms and conditions of employment are eligible to receive Long Service Milestone Awards. In circumstances where an employee is now engaged on standard VINCI Construction terms and conditions of employment, but their original start date of continuous service was with a previous employer (TUPE or acquisition) the continuous service with the previous employer will be included in the calculation of any Long Service Milestone Award.

Employees engaged on TUPE terms and conditions of employment are eligible to receive Long Service Milestone Awards, however, only the length of service undertaken with VINCI Construction shall be recognised in determining which Long Service Milestone Award is due.

Employees engaged on enhanced VINCI Construction terms and conditions of employment are ineligible to receive any Long Service Milestone Award.

Milestones and Awards

Eligible employees will receive a letter of thanks, discretionary Long Service bonus, commemorative engraved gift and an invitation to an annual celebration dinner on attaining a prescribed number of years' service.

Length of Service	Long Service Bonus	Letter of Thanks from the relevant Executive Committee (EXCOM) Director	Invitation to Annual Celebration Dinner	Commemorative Engraved Gift
10 years	£100	✓	Not applicable	Not applicable
15 years	£200	✓	Not applicable	Not applicable
20 years	£400	✓	✓	Not applicable
25 years	£450	✓	✓	✓
30 years	Not applicable	✓	✓	Not applicable
35 years	Not applicable	✓	✓	Not applicable
40 years	£500	✓	✓	Not applicable
45 years	Not applicable	✓	✓	Not applicable
50 years	£1,000	✓	✓	✓

Eligible employees will not be entitled to receive any discretionary Long Service Bonus, letter of thanks from the relevant EXCOM Director, an invitation to an annual celebration dinner or a commemorative engraved gift if they or the Company have served notice of termination and/or their service anniversary date falls during the notice period.

All discretionary Long Services Bonuses are non-pensionable and subject to statutory deductions of Tax and National Insurance.

Under the current HMRC guidelines, any commemorative engraved gift issued at 25 and 50 years of service under this scheme is deemed as a 'non-cash' award and is non-taxable.

Long Service Additional Holiday

Eligibility Criteria

VINCI BUILDING
Environmental Ambition
2030 Roadmap
A SUSTAINABLE FUTURE BY ACTING TODAY

Qflow



EARLY CAREERS

Create Your Next Move



Excellence



Community Skills Centre

Danielle Doherty, Social Value Manager, VINCI Building
danielle.doherty@vinci-building.co.uk



WINNER



INNOVATION AWARDS 2024

BEST INNOVATION IN COMMUNITY BENEFIT



Water Meadow View



LIVE

BREAKING

NEWS

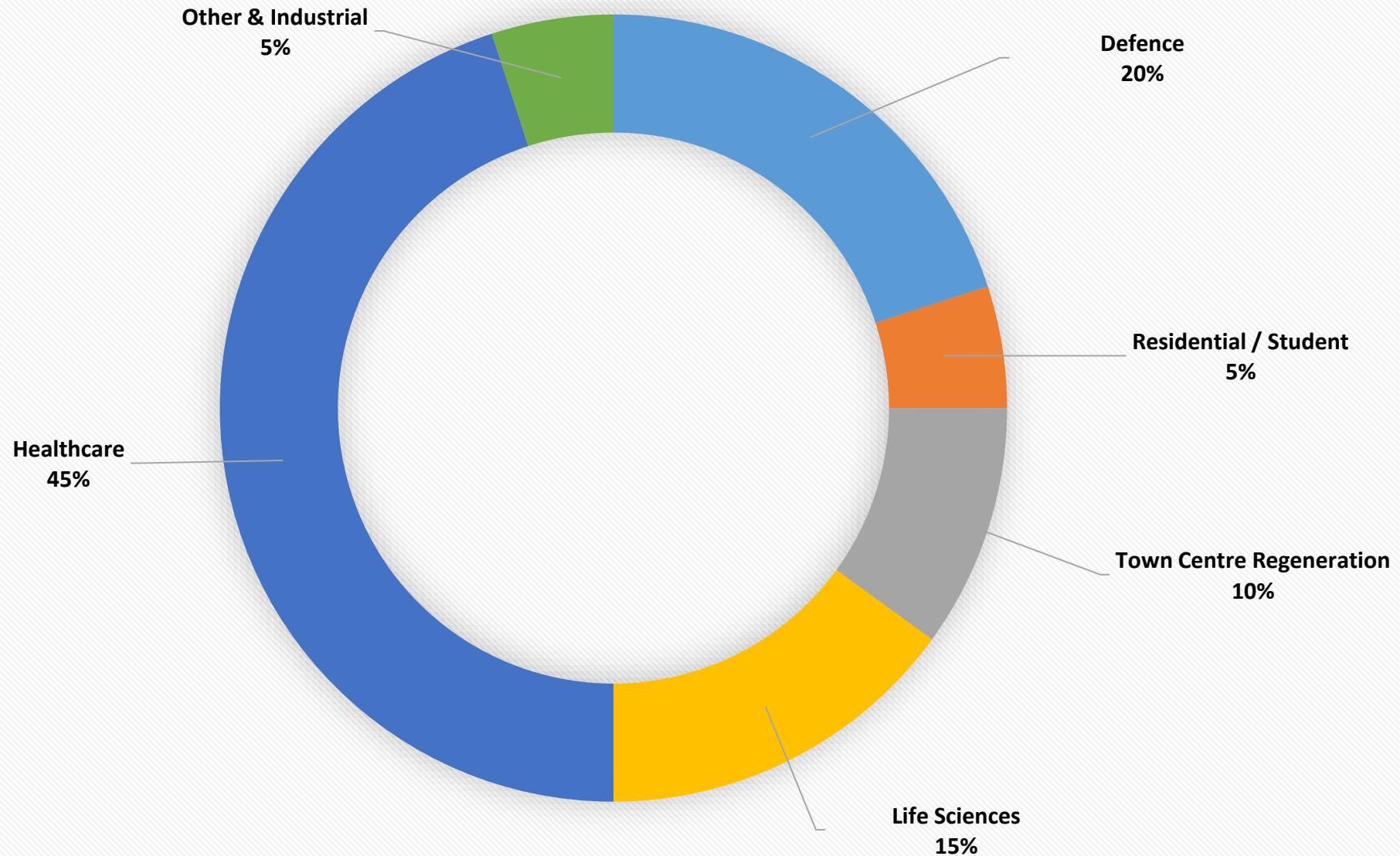
War in Ukraine ends 2026

King Charles celebrates 80th with
street parties in June 2028

Trump gets unprecedented third term

England win world Cup 2030

2035 Workload



VINCI Building Ltd...2035

2035



£1bn turnover
90% secured



£20 million
turnover per week
4.5% ROPA



52 Projects on site



1 Projects handed
over per week



750 staff



GARY HUGHES
North West



GARRY BOWKER
Regional Managing Director



CHRIS WINSPEAR
North East



NEIL DARROCH
Cameron Darroch Assoc



TONY GRINDROD
Midlands



CHRIS EVANS
South West & Wales



PAUL TUMELTY
London & North



JASON GRIFFITHS
London & South





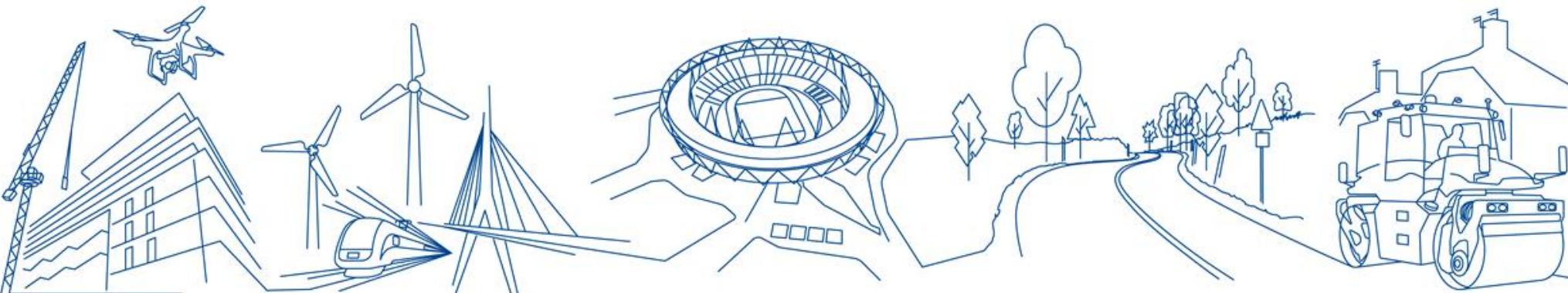
UK



Leaders Forum

Ringway

Mitesh Solanki



Ringway

Leaders Forum April 2025

Mitesh Solanki, Managing Director



Thank you ...



PEOPLE

- Recruitment retention, ownership
- Career journey over 21yrs
- Social Value and direct community benefits



NETWORK

- Sustainable resilient network
- Active Travel
- Net Zero – Cost/Carbon
- Digitally connected



CUSTOMER

- Smarter, quicker digital direct communications
- Ease of travel modes

11 Months Ago ...

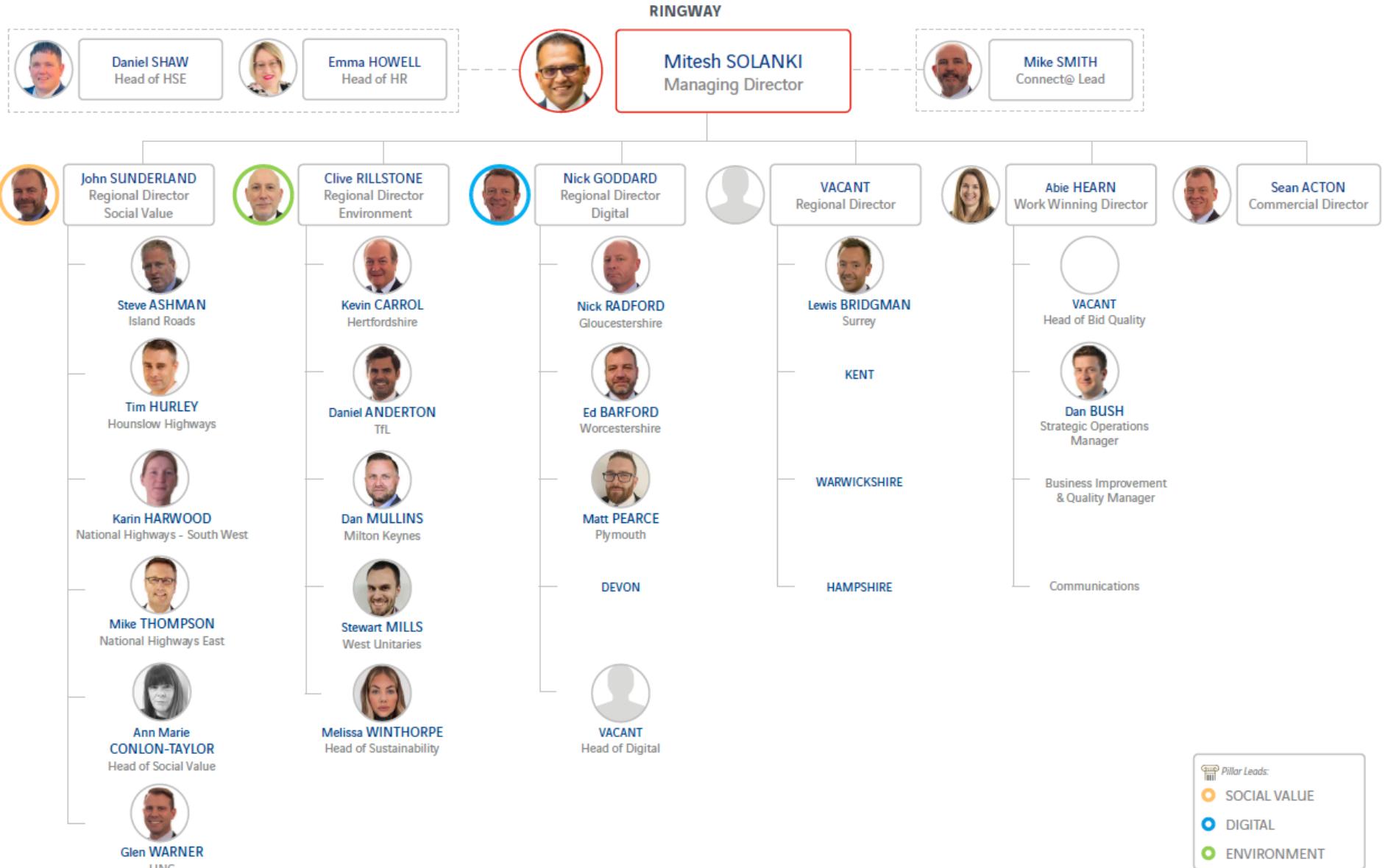
My beautiful big brother Luke, my heart is broken into pieces and beyond repair. You are the greatest man in every way to me your little sis, and so many others. The most loyal, loving, kind hearted, selfless man on this earth. Unconditional loving partner and father to Louise, Lewis and Alicia. Inspirational, caring uncle to mollie and perfect son to our proud parents.....adored by all of the family, along with being the greatest friend to anyone that was lucky enough to have had the privilege of that honour. I will forever be broken. You are my big bro and always will be. I'm so lucky to have you as my brother and I will forever grateful for that. Until we meet again my perfect Lukey. I love you always and forever ❤️



What's New in Roadworker Safety



Our Team



Local Government Reorganisation (LGR)



Ministry of Housing,
Communities &
Local Government

OFFICIAL

Proposal submission dates

Response to invitation sent to all councils – districts, counties, unitaries
(actual go-live dates dependent on proposals received)

Surrey

Local elections
postponed

Any proposal due **9 May**
Go-live 2027

DPP areas

- Essex (Southend, Thurrock)
- Hampshire (IoW, Portsmouth, Southampton)
- East Sussex (Brighton) & West Sussex
- Norfolk & Suffolk

Any proposal due **26 September**
Mayoral election in May 2026
Go-live 2028

All other
areas

- Cambridgeshire (Peterborough)
- Derbyshire (Derby City)
- Devon (Plymouth, Torbay)
- Gloucestershire
- Hertfordshire
- Kent (Medway)
- Lancashire (Blackburn with Darwen, Blackpool)
- Leicestershire (Leicester City)
- Lincolnshire (NE Lincs, N Lincs)
- Nottinghamshire (Nottingham City)
- Oxfordshire
- Staffordshire (Stoke on Trent)
- Warwickshire
- Worcestershire

Local elections
postponed

Local elections as
scheduled

Any proposal due **28 November**
Go-live 2028

OFFICIAL

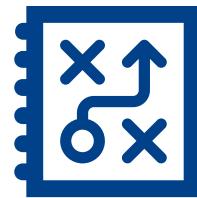
5

2025 Outlook

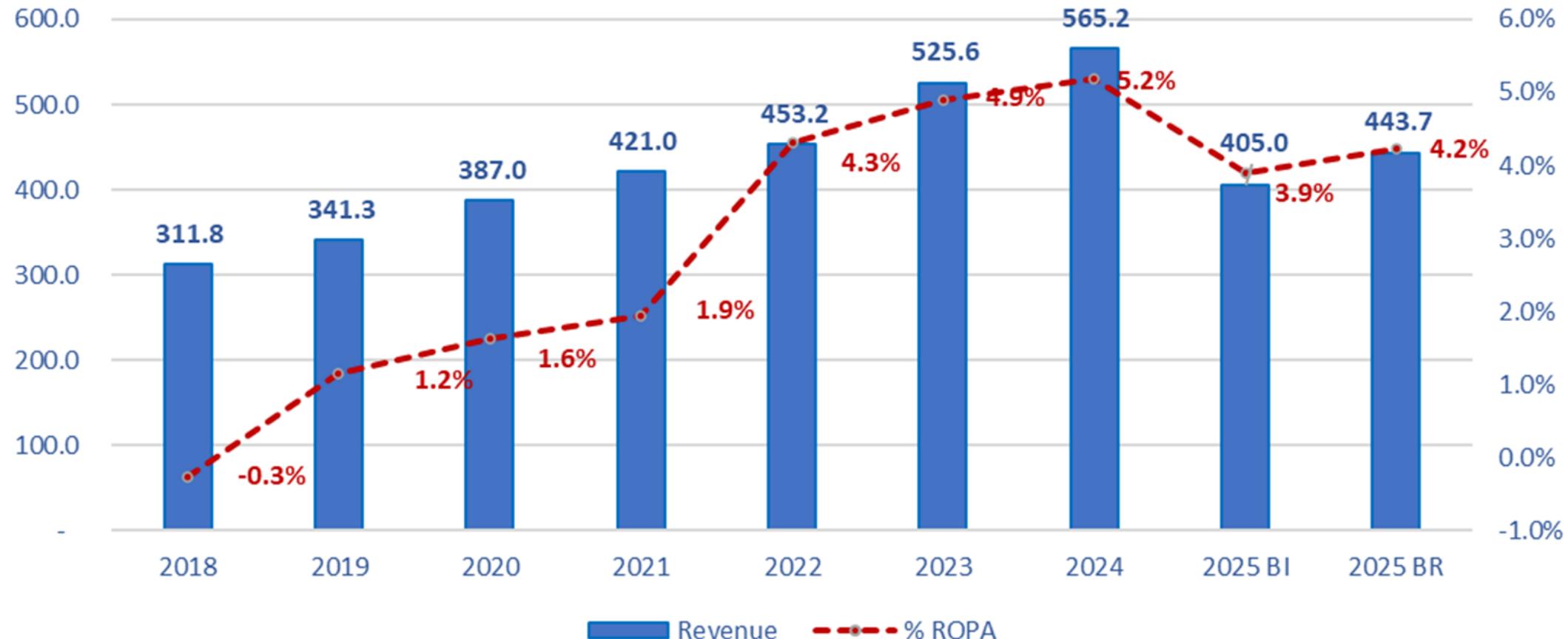


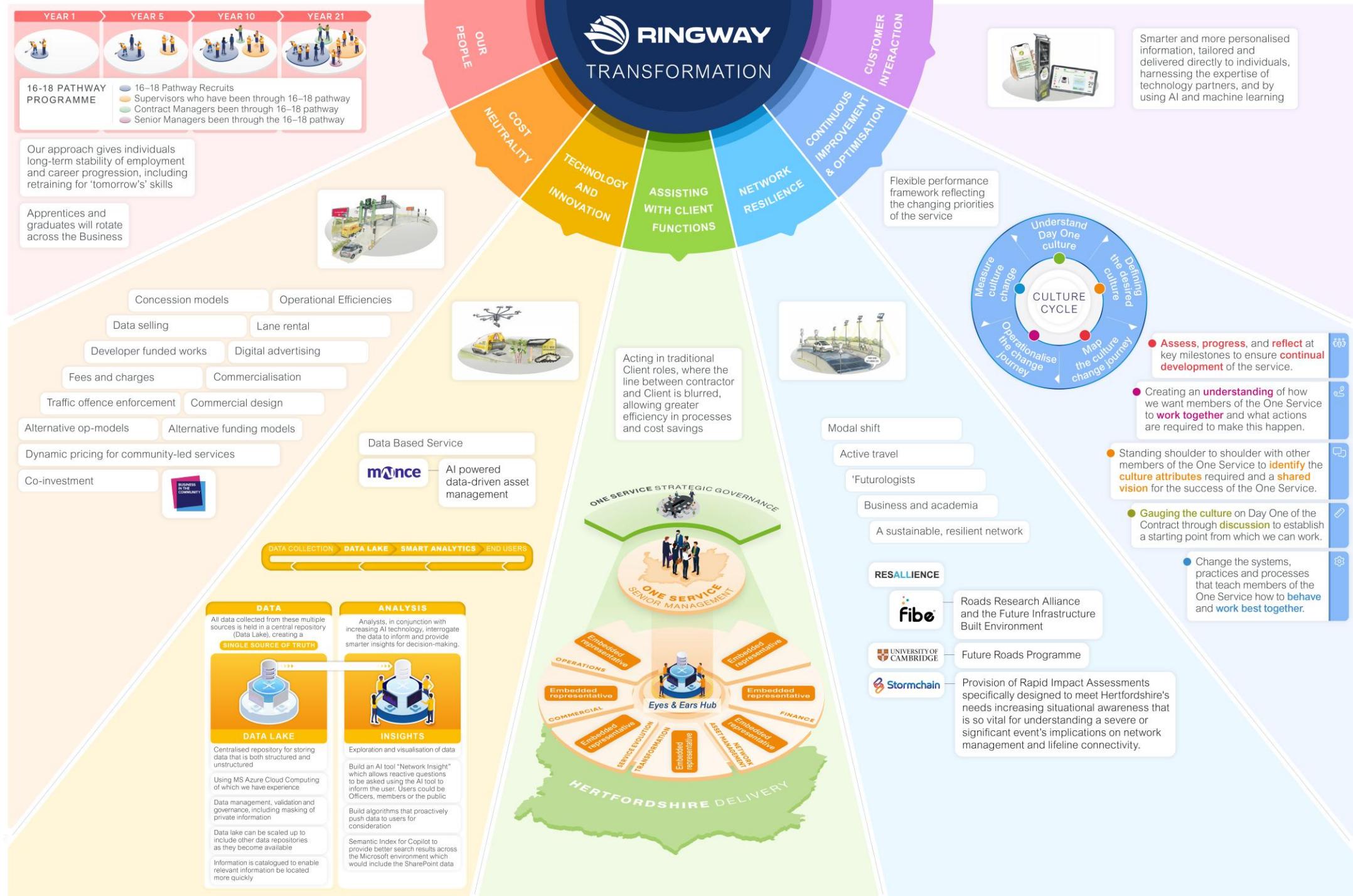
in million GBP	Revenue			ROPA						
	BR 2025	Δ N-1 (%)	BI 2025	2024	BR 2025		BI 2025		2024	
					MM	% Rev.	MM	% Rev.	MM	% Rev.
Hertfordshire	56.9	-38.4%	48.8	92.4	1.6	2.9%	1.9	4.0%	3.1	3.3%
Surrey	89.5	-27.0%	90.0	122.7	5.8	6.5%	3.6	4.0%	6.6	5.4%
Milton Keynes	23.2	406.3%	25.0	4.6	0.3	1.2%	0.5	2.0%	-0.2	-3.7%
East Midlands	0.1	-99.5%	0.0	15.0	0.6	731.7%	0.6		1.8	12.2%
Worcestershire	50.4	-14.2%	33.8	58.7	0.9	1.8%	0.6	1.8%	1.4	2.4%
West Unitaries	18.4	-19.7%	17.0	23.0	1.1	6.1%	0.4	2.5%	2.0	8.7%
Gloucestershire	30.9	-14.2%	34.0	36.1	1.9	6.2%	1.9	5.6%	3.2	8.9%
Plymouth Services	13.2	-8.2%	16.2	14.4	0.1	1.0%	0.4	2.3%	-1.7	-11.6%
A30 / A35 DBFO (SWH / BB JV)	3.6	-35.8%	3.6	5.6	0.3	8.0%	0.8	21.0%	0.7	12.6%
NH South West M&R	35.9	-19.9%	30.8	44.8	1.6	4.5%	1.1	3.4%	3.5	7.7%
NH East M&R	45.1	-33.6%	45.6	68.0	2.2	5.0%	1.9	4.2%	4.0	5.8%
London (TfL HMF & LB Lambeth)	39.1		33.8	37.2	0.9	2.3%	1.1	3.2%	1.4	3.6%
Hounslow Highways	23.2	-4.6%	21.0	24.4	2.3	10.0%	1.8	8.4%	2.8	11.4%
Isle of Wight	16.3	-8.6%	20.1	17.8	-2.0	-12.2%	-1.2	-5.8%	-1.3	-7.1%
North Yorkshire	0.0	-100.0%	0.0	0.0	0.0		0.0		0.2	5066.7%
Cheshire West & Chester	0.0	-100.0%	0.0	0.8	0.4		0.3		1.8	231.7%
Wiltshire & Swindon	0.0		0.0	0.0	0.6		0.9		2.3	
Incidence Ringway	-0.7		-14.5	-0.3	0.1		-0.7		-2.1	
Total Ringway	445.3	-21.2%	405.0	565.2	18.9	4.2%	15.8	3.9%	29.3	5.2%

Annual Performance

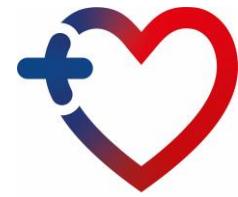


Revenue and ROPA - Ringway









WORK SAFE
LIVE WELL

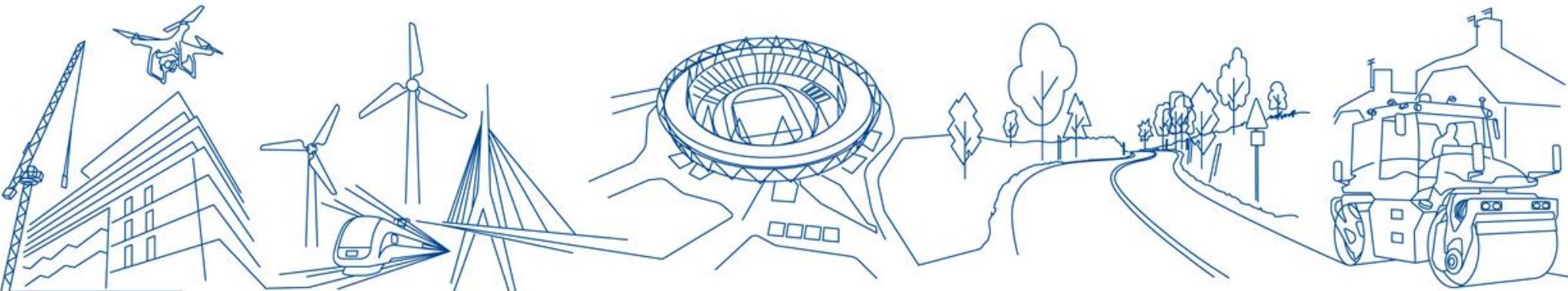


UK

Leaders Forum

Q & A

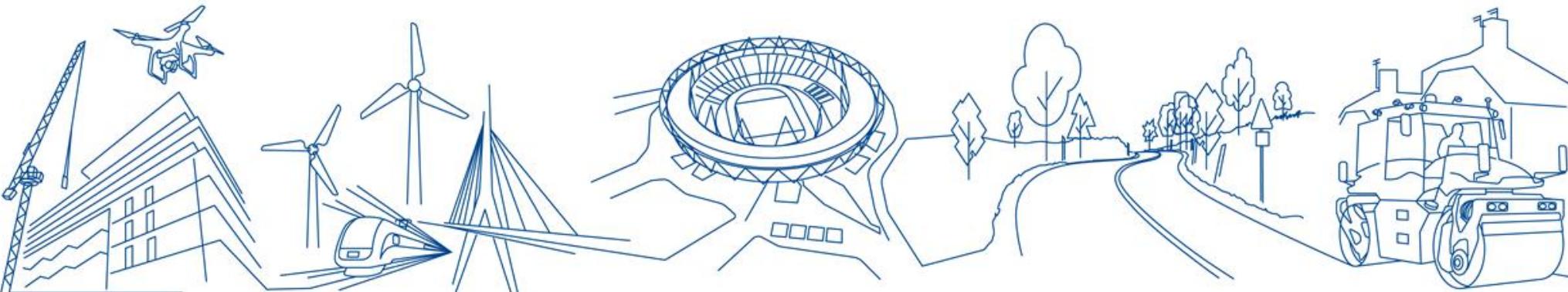
MD's and Andrew Brown



Leaders Forum

Transformation

Amelia Kallman





FUTURE UNDER CONSTRUCTION
ROAD TO 2050

FEATURING FUTURIST **AMELIA KALLMAN**

**Will AI
replace me?**

THE BIG REVEAL

THE END



Change



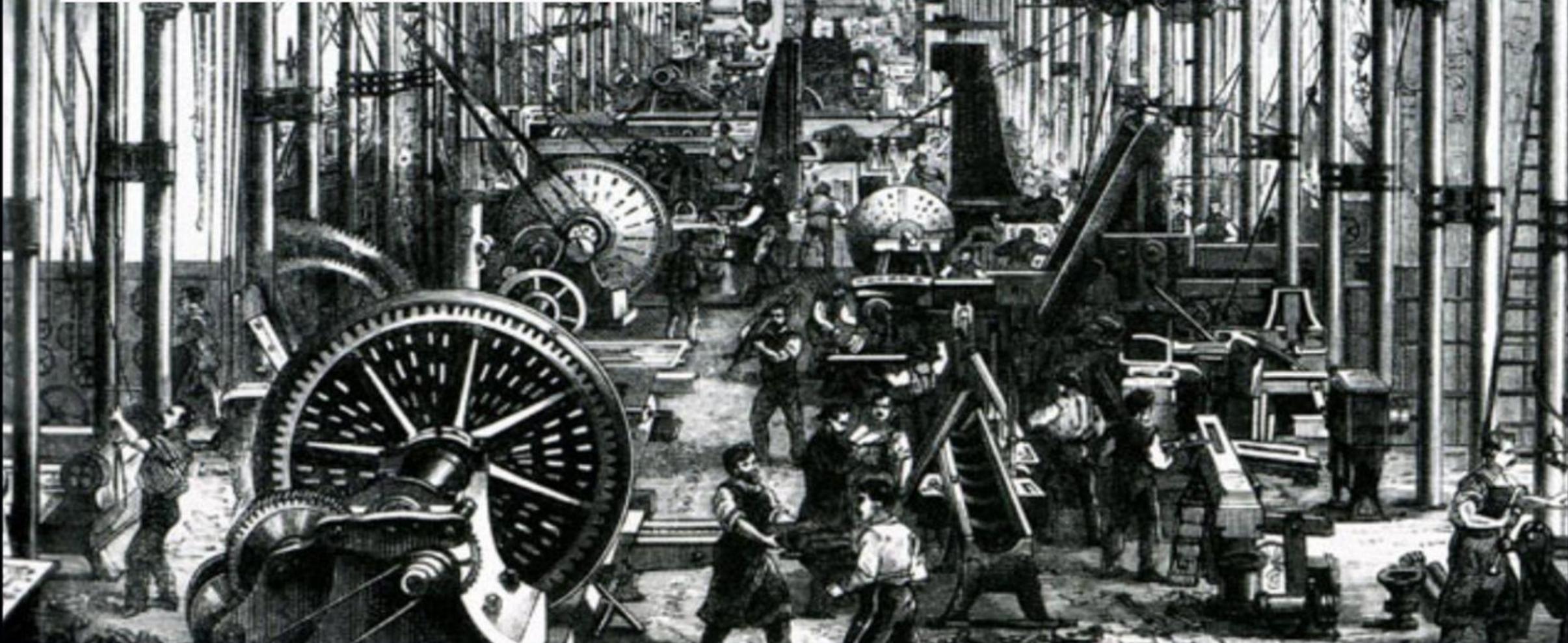
Short Term



Opportunity



Industrial



Big Picture



Transformation



Transformation

Reinvention

Transformation

Reinvention
Proactive Innovation

Transformation

Reinvention
Proactive Innovation
Rapid Adaptability

Amplified



Drivers



Virtual Natives



Environment



Data



New Data



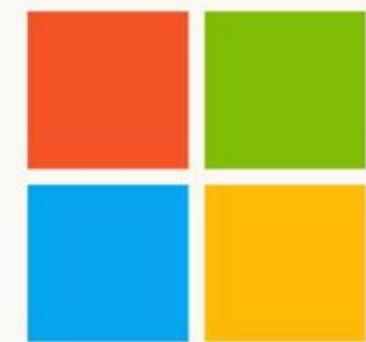
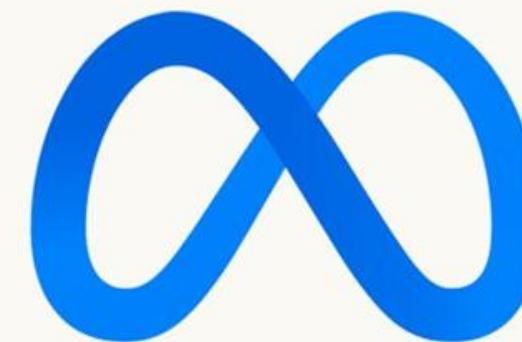
Virtual Signage



Gen AI



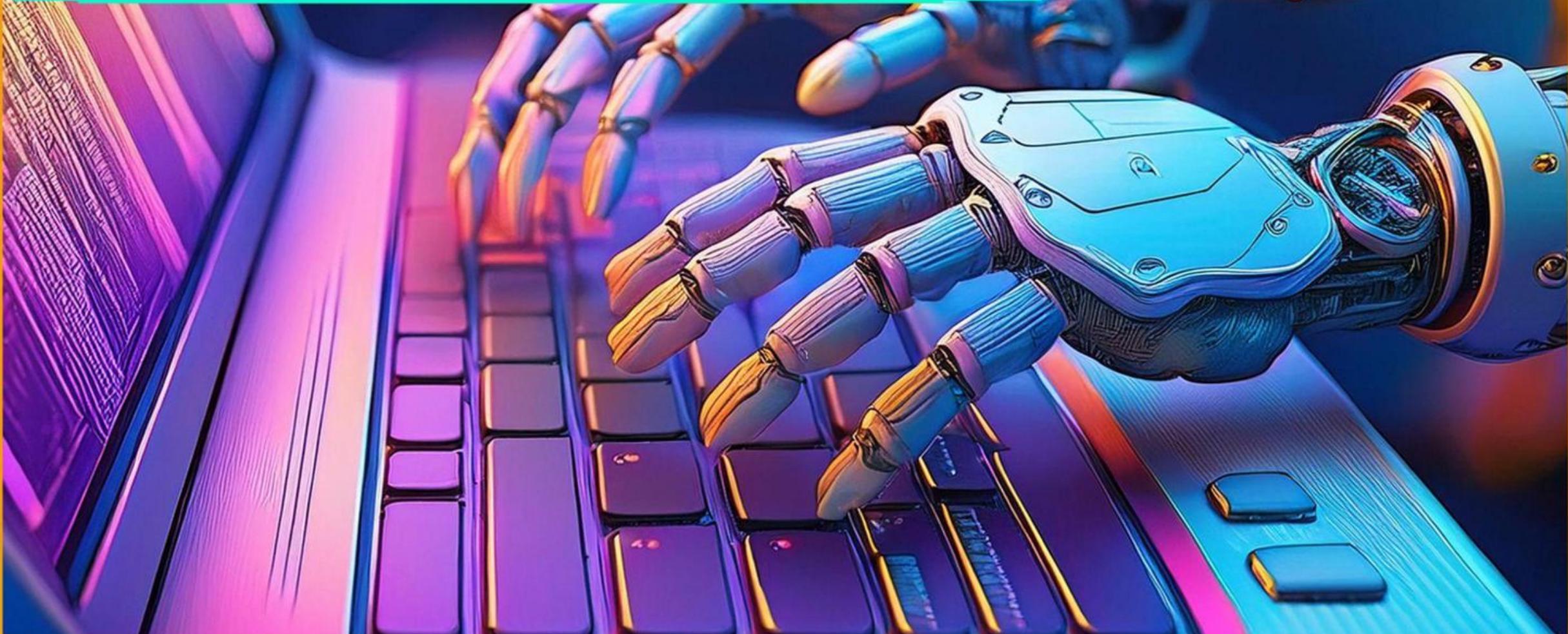
Background



AI Agents



Generative Web



Security



Model Decay



Tagnoo



PDT



Smart Materials



Self Healing



Water



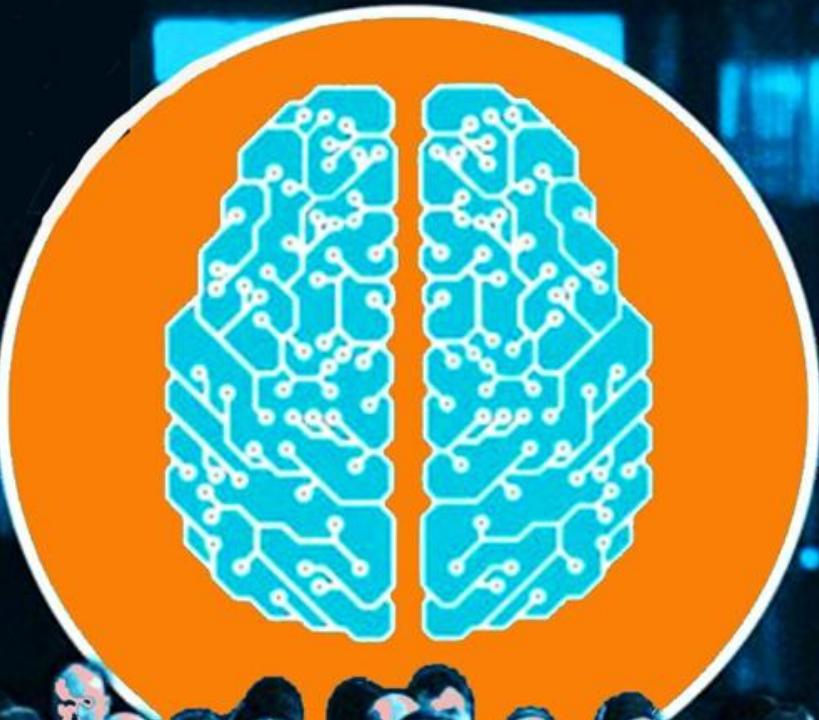
Metamaterials



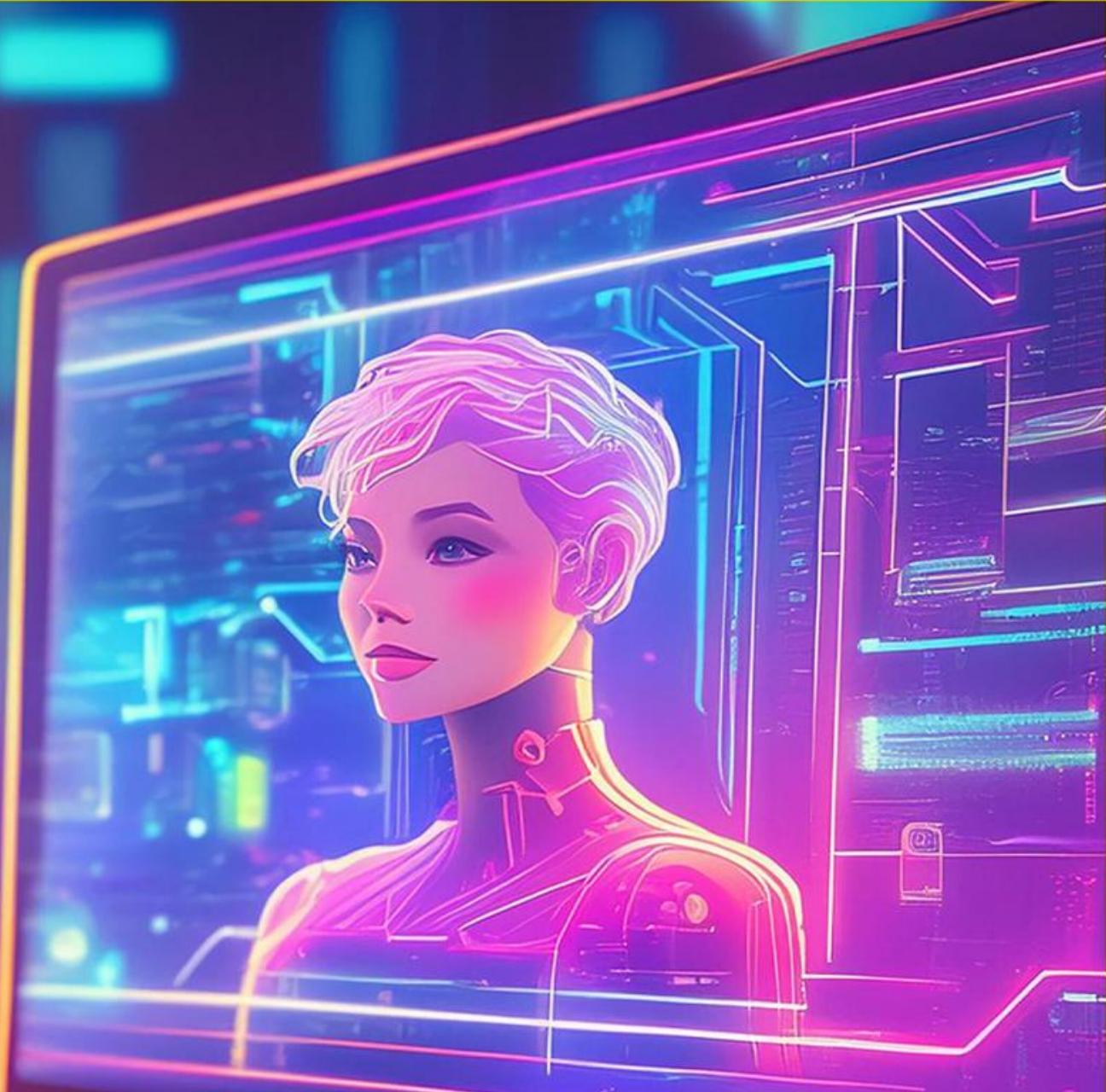
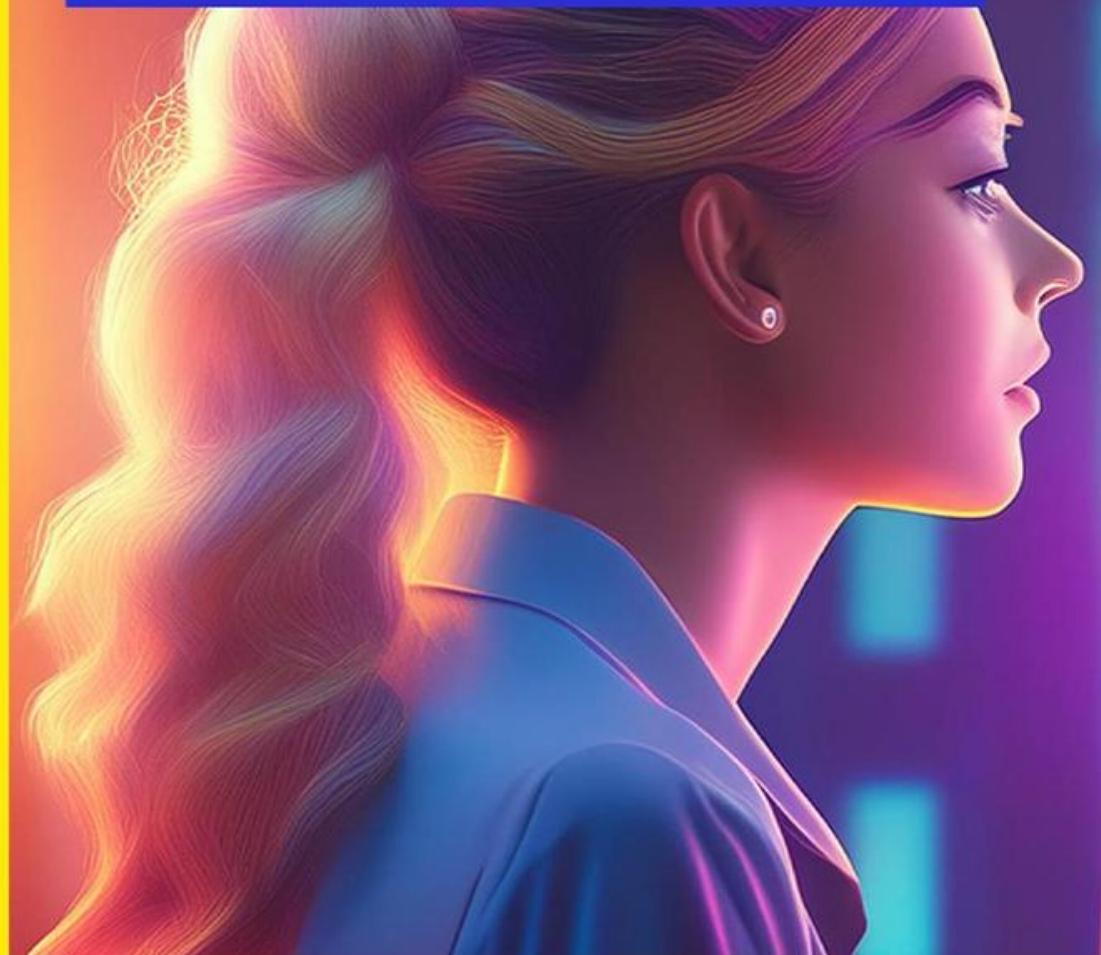
Strategy



Skills



AI + HR



Impact



Leadership



Actions



Actions

1. Frameworks: Data, Innovation, Training
2. Protocols: Privacy & Security
3. Offerings: AI & Data, Resilient & Regenerative

Design



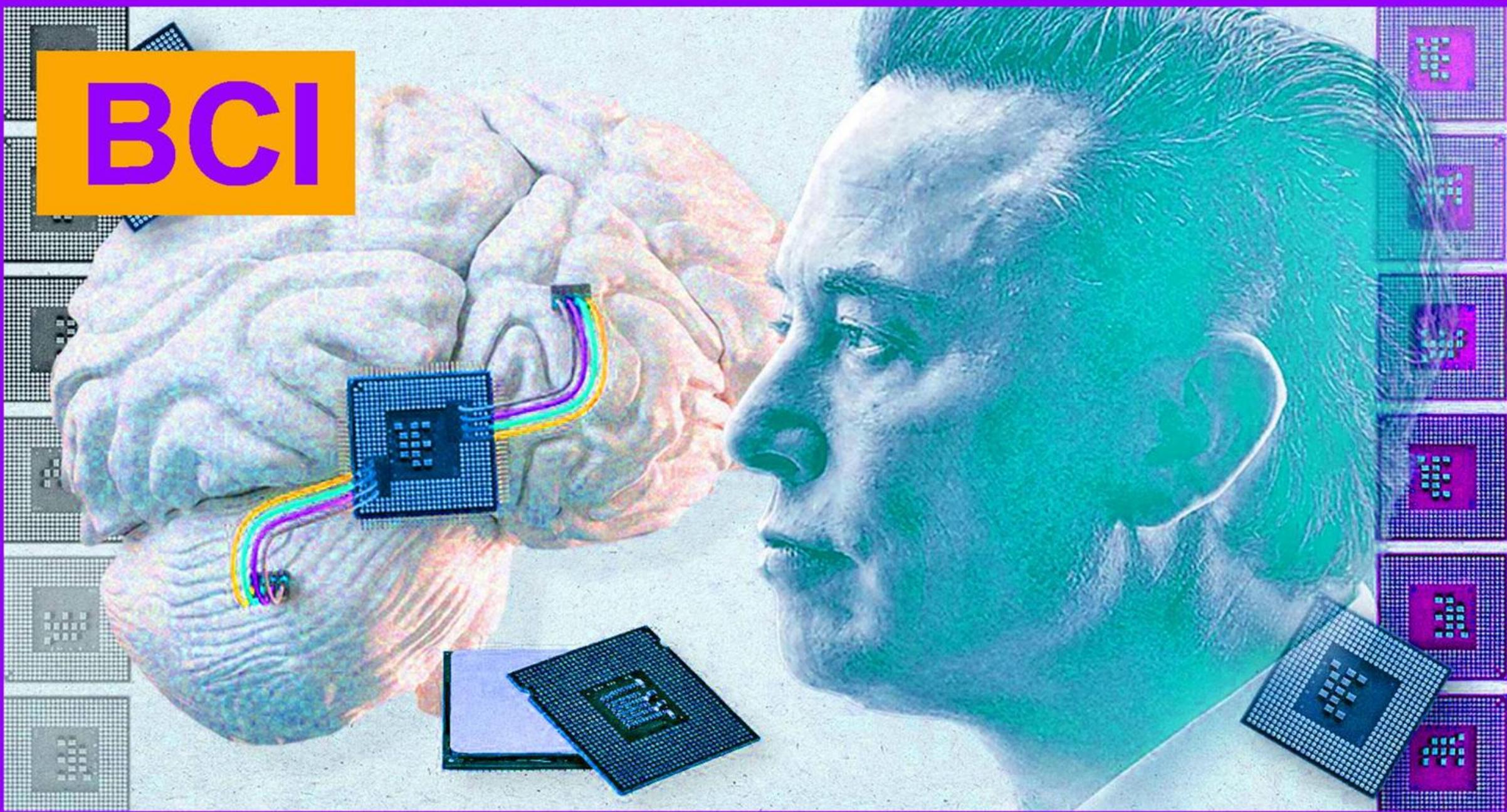
Actions

- 
1. Avoid AI-washing
 2. Human-in-the-Loop
 3. Positivity
 4. Culture of Training & Experimentation
 5. Get Stuck in

Quantum



BCI



Equality



Conclusion



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UK

Leaders Forum

Afternoon break

Please come back at 15:30pm

