

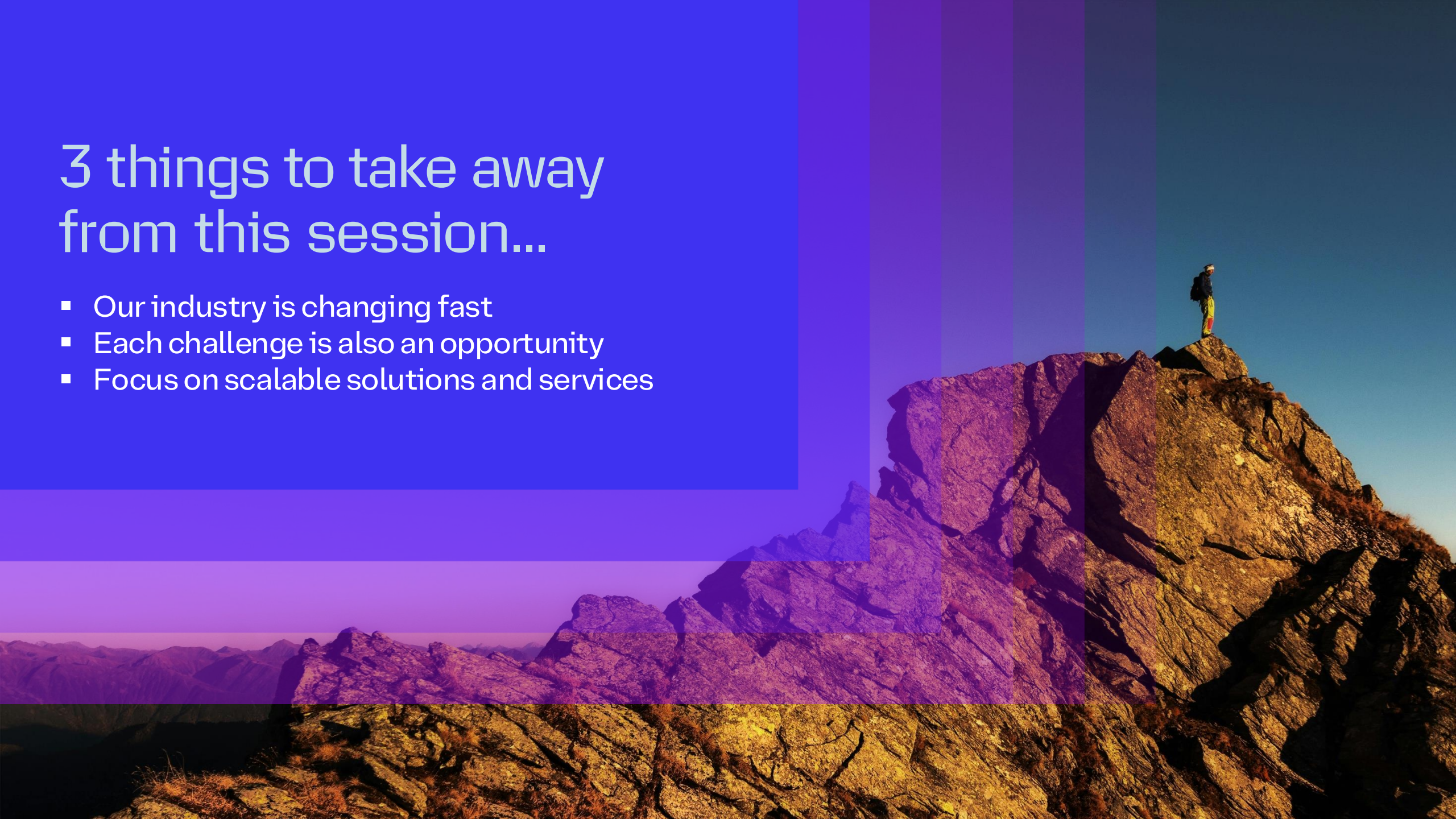
# Reflections on a Year of Progress

Capturing Value, Learning Lessons &  
Pivoting in a Rapidly Changing Industry



# 3 things to take away from this session...

- Our industry is changing fast
- Each challenge is also an opportunity
- Focus on scalable solutions and services

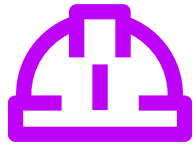




# It's been another big year...



# Our industry is growing



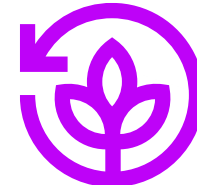
\$13.9 tr.

Predicted value of construction industry in 2037\*



\$4.2 tr.

Expected growth of construction market by 2037\*



51%

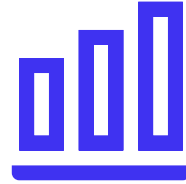
Of construction work over next 15 years done by China, the US and India\*

# Investment in tech and AI is rising



**\$50b**

Investment in AEC tech between  
2020 and 2022\*



**+50%**

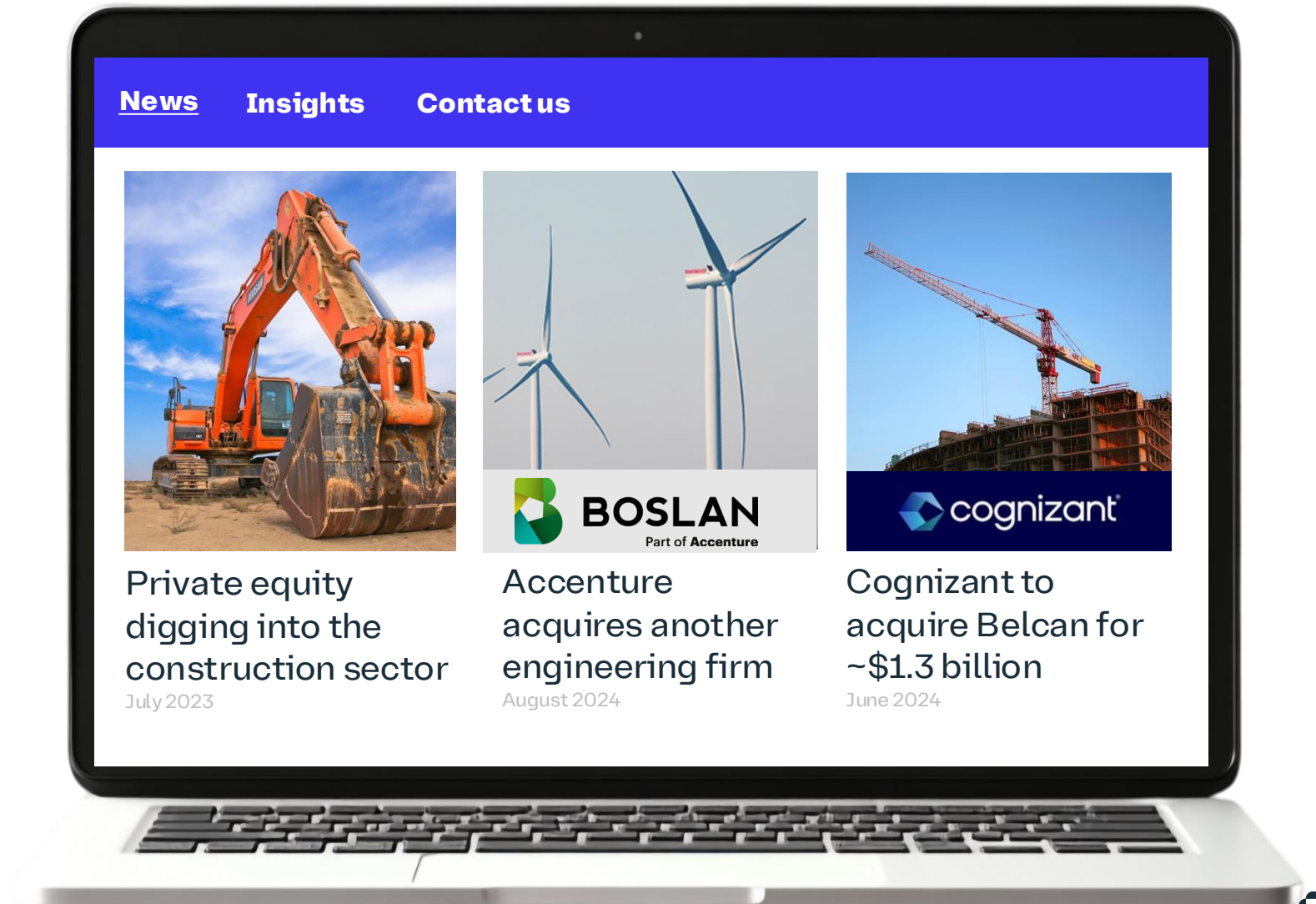
Rise in AI investment in  
2024†



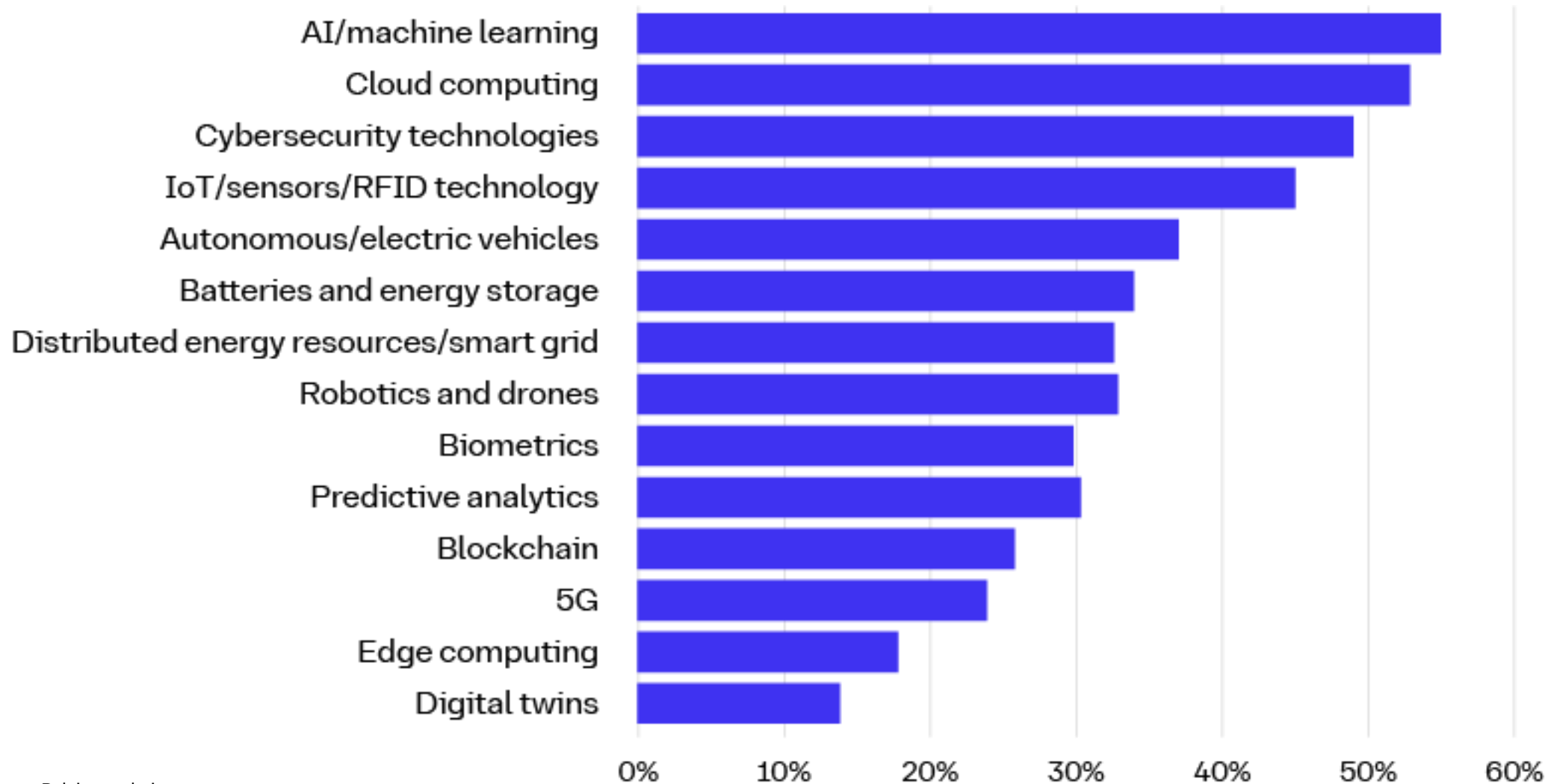
**\$131.5b**

Venture Capital invested in AI and  
Machine Learning in 2024†

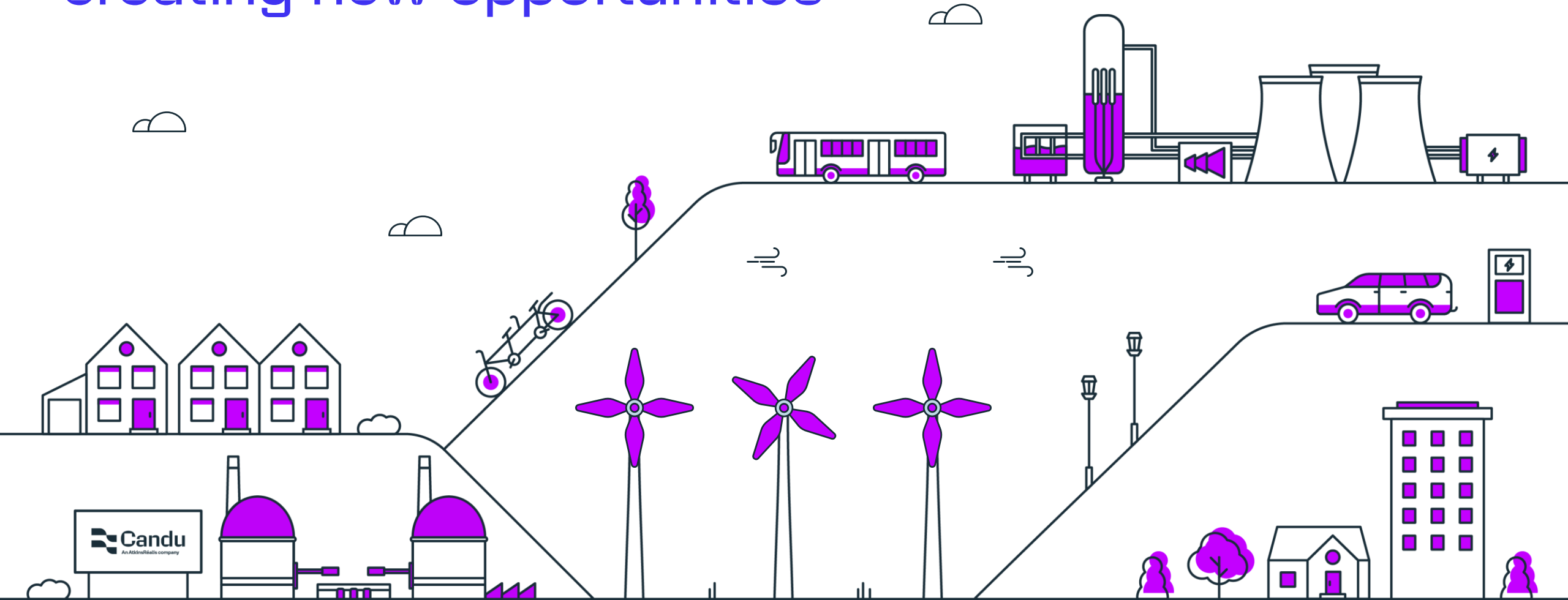
# Private equity and big tech are going shopping



# Which tech will have the most impact on infrastructure in the next three years?



# But all this change is also creating new opportunities





# Our nuclear expertise

From design to decommissioning and waste management, we're helping our clients throughout the nuclear lifecycle so that households, businesses and our communities around the world can benefit from safe, reliable and clean nuclear power for generations to come.

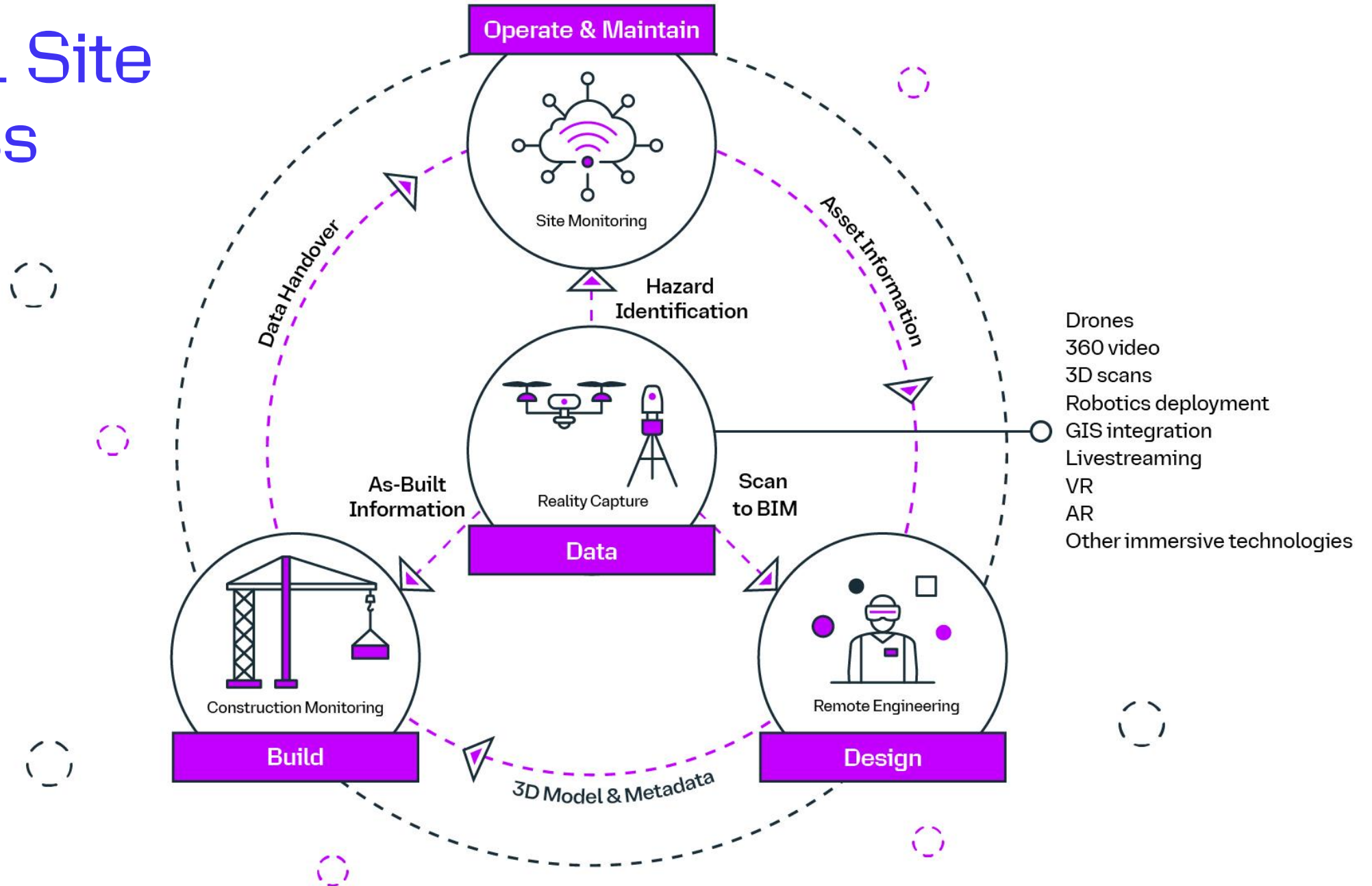
- New build
- Operations & maintenance
- Decommissioning
- Waste management
- Design & innovation
- Life extension

We are also stewards of CANDU® technology, a Canadian pressurized heavy-water reactor design, which has been used to generate electric power for more than 60 years.



**Your Site. ▶ Anywhere.**

# Virtual Site Access

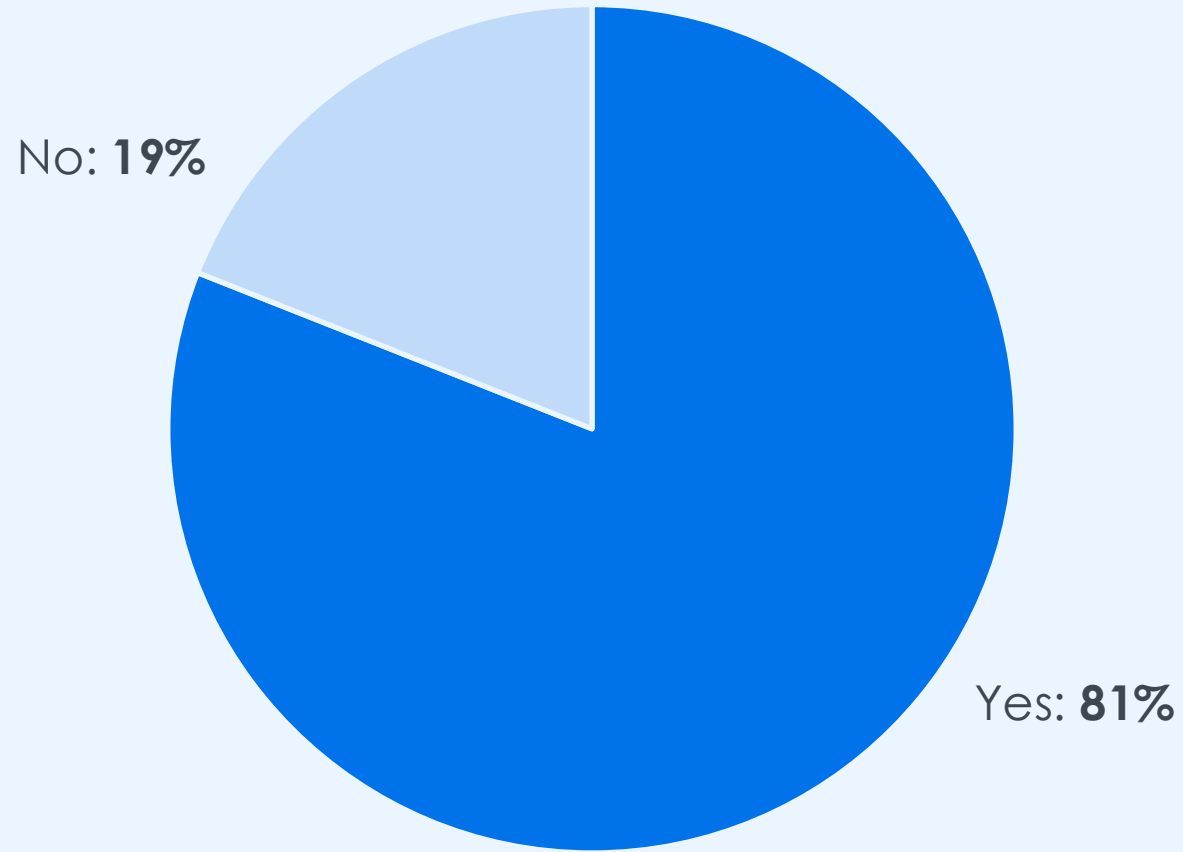


# POLL

What has changed since last year?

1. Do you currently have AI projects underway?

# Last year's results:



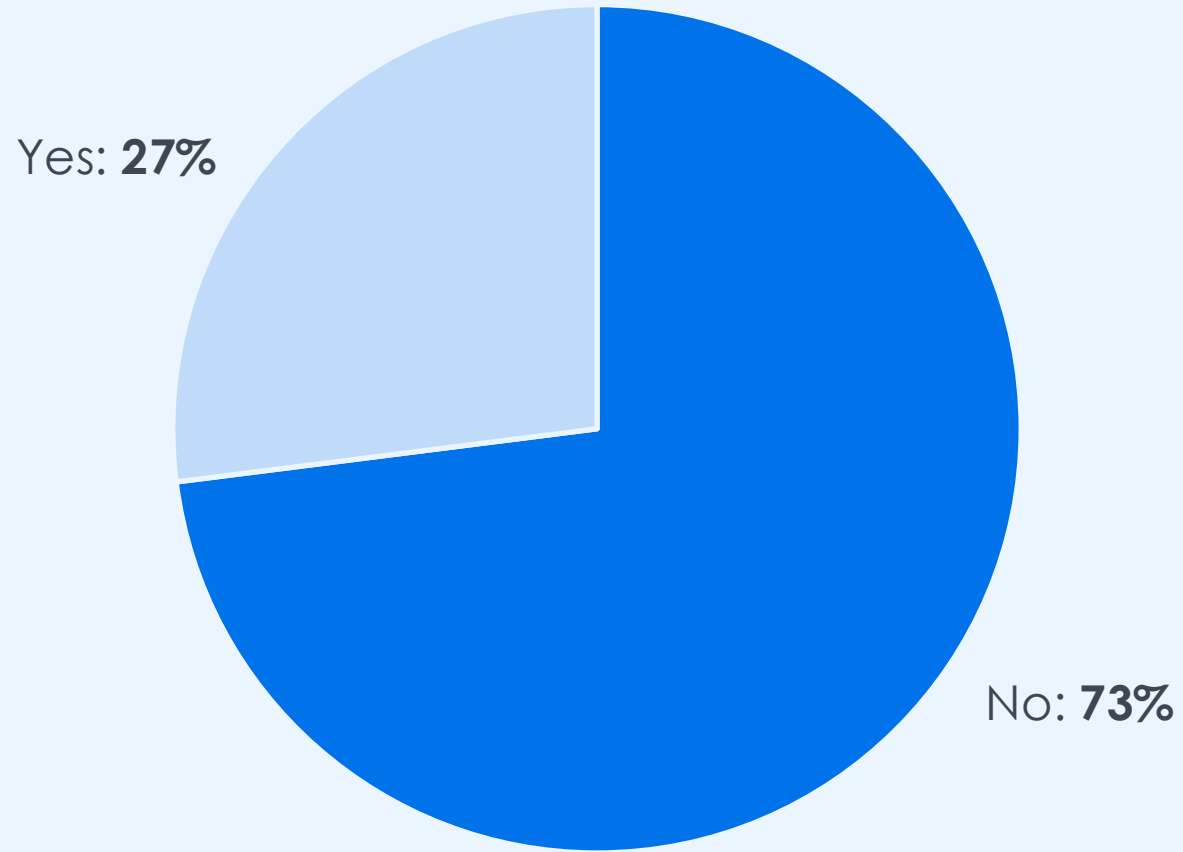


# POLL

What has changed since last year?

2. Do you have a bankable plan to translate AI tech to value in your organization?

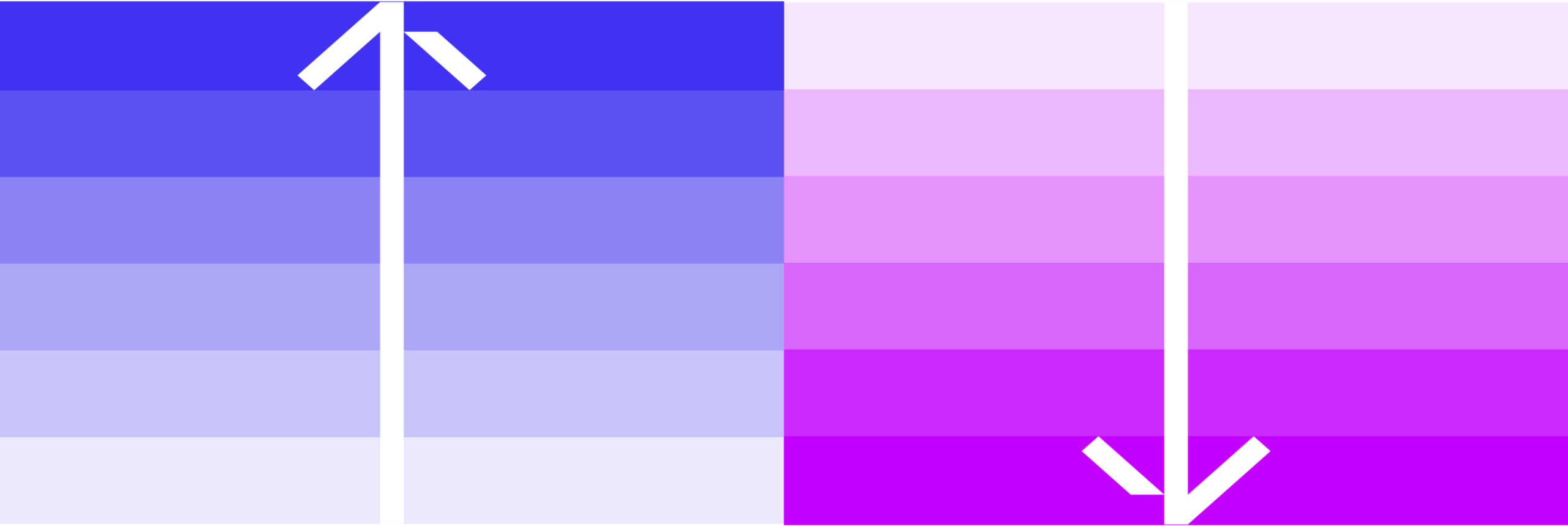
# Last year's results:



# What will 2026 look like?

A year of tailwinds?

Or a year of headwinds?



# BREAKING



■ WHITE SWAN NEWS NETWORK ■

**STRONG GROWTH ACROSS AEC INDUSTRY  
AMID SURGE IN AI AND DIGITAL ADOPTION**

# BREAKING



■ BLACK SWAN NEWS NETWORK ■

**TECH DISRUPTION SHAKES UP AEC SECTOR:  
STARTUPS SURGE, BIG FIRMS STRUGGLE**



# POLL

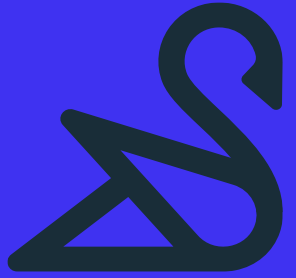
How will the next two years go?



1. What do you think is the most important factor in achieving industry success?

# POLL

How will the next two years go?



2. What do you think is the greatest risk we face as an industry?

