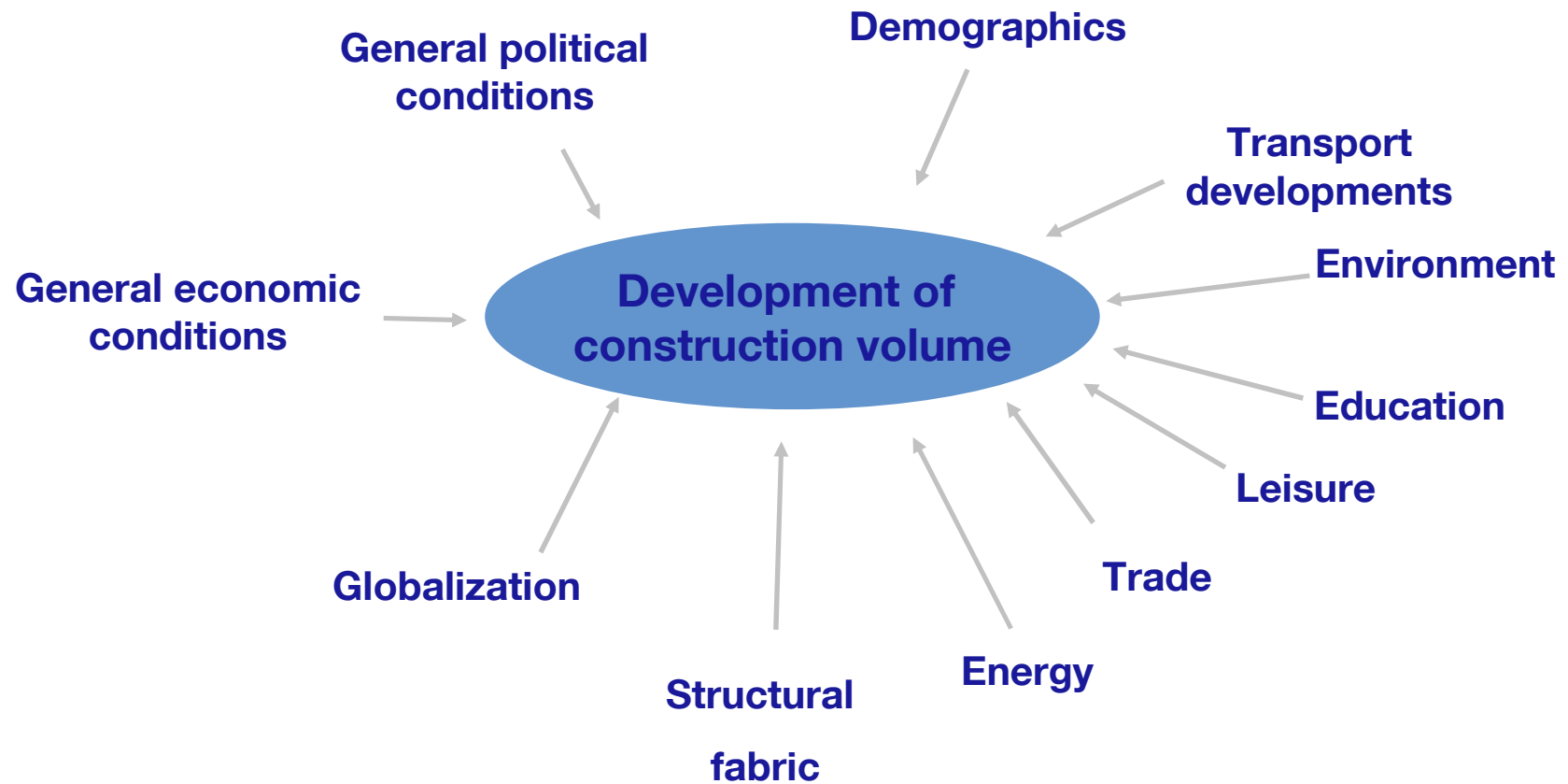


Researching trends and the future at HOCHTIEF Construction AG

Dr. Burkhard Lohr, CFO HTE



Factors influencing the market



Why does HOCHTIEF conduct trend research?

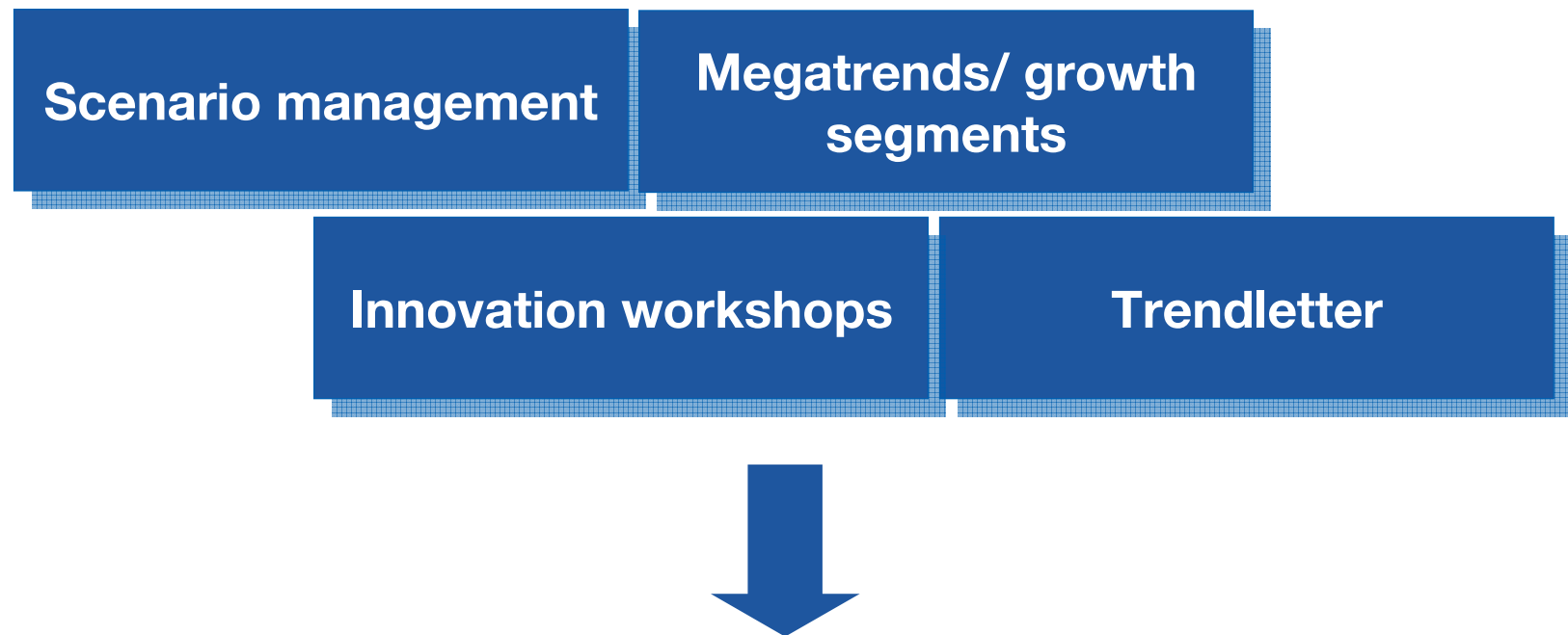


Difficult market environment
calls for
new approaches and
innovative solutions



Trend research

Four modules in trend and future research



Trend and future research as basis for innovative products and a robust strategy

Trend to investment in educational facilities

Reasons:

- General refurbishment backlog in public-sector building construction slowly being overcome by such new models as PPP and “Design – Build – Finance”
- Pisa shock generating higher investment
- Increasing number of private educational establishments being founded
- New technologies being adopted by schools and universities (W-LAN...)
- School buildings not used effectively at present
Networking with other public-sector facilities reduces construction and operating costs



Comprehensive school Wuppertal-Barmen

The schools of the future

Chances in the growth market of education

Increasing educational requirements

Project description

Innovative solutions for

- the financing
- construction
- and operating

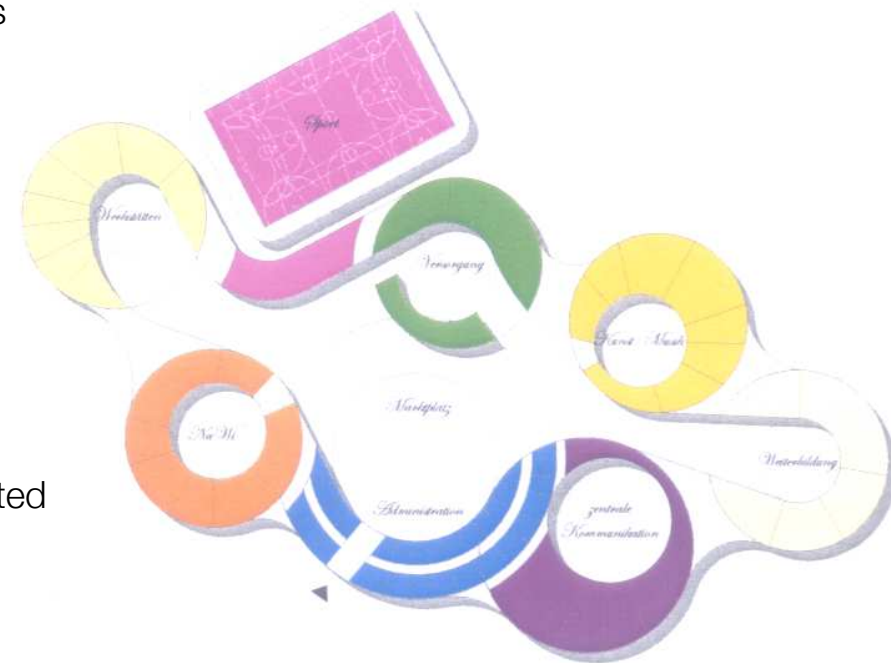
of schools on the basis of future-oriented pedagogical concepts.

Partners

BRT Architekten Bothe Richter Teherani
HOCHTIEF Consult Essen
HOCHTIEF Construction, Market Development & Relations

Exemplary pilot project

Individual design



Trend to investment in healthcare facilities

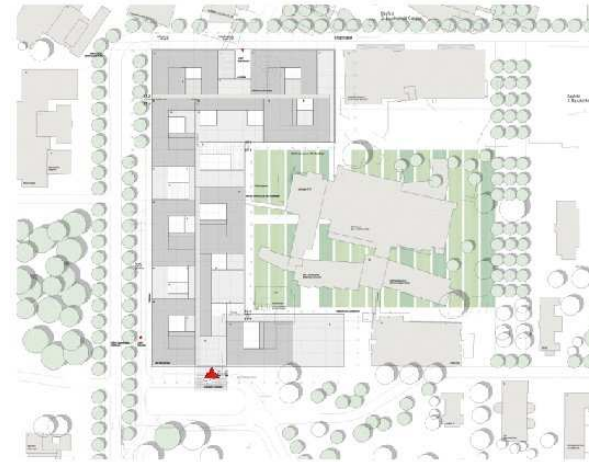
Reasons:

- General backlog in public-sector building construction being overcome by new financing and private development models
- Demographic development
- Medical advances bring new forms of treatment
- Medicine increasingly important as economic factor
(treating wealthy private patients from abroad)



University Hospital Hamburg Eppendorf

University Clinic Hamburg-Eppendorf



- Contract volume: EUR 113 million
- Gross floor area: 85.000 sqm
- 720 beds
- outpatient units and operating theaters
- HOCHTIEF has also been commissioned with the execution planning

Trend to investment in secure buildings

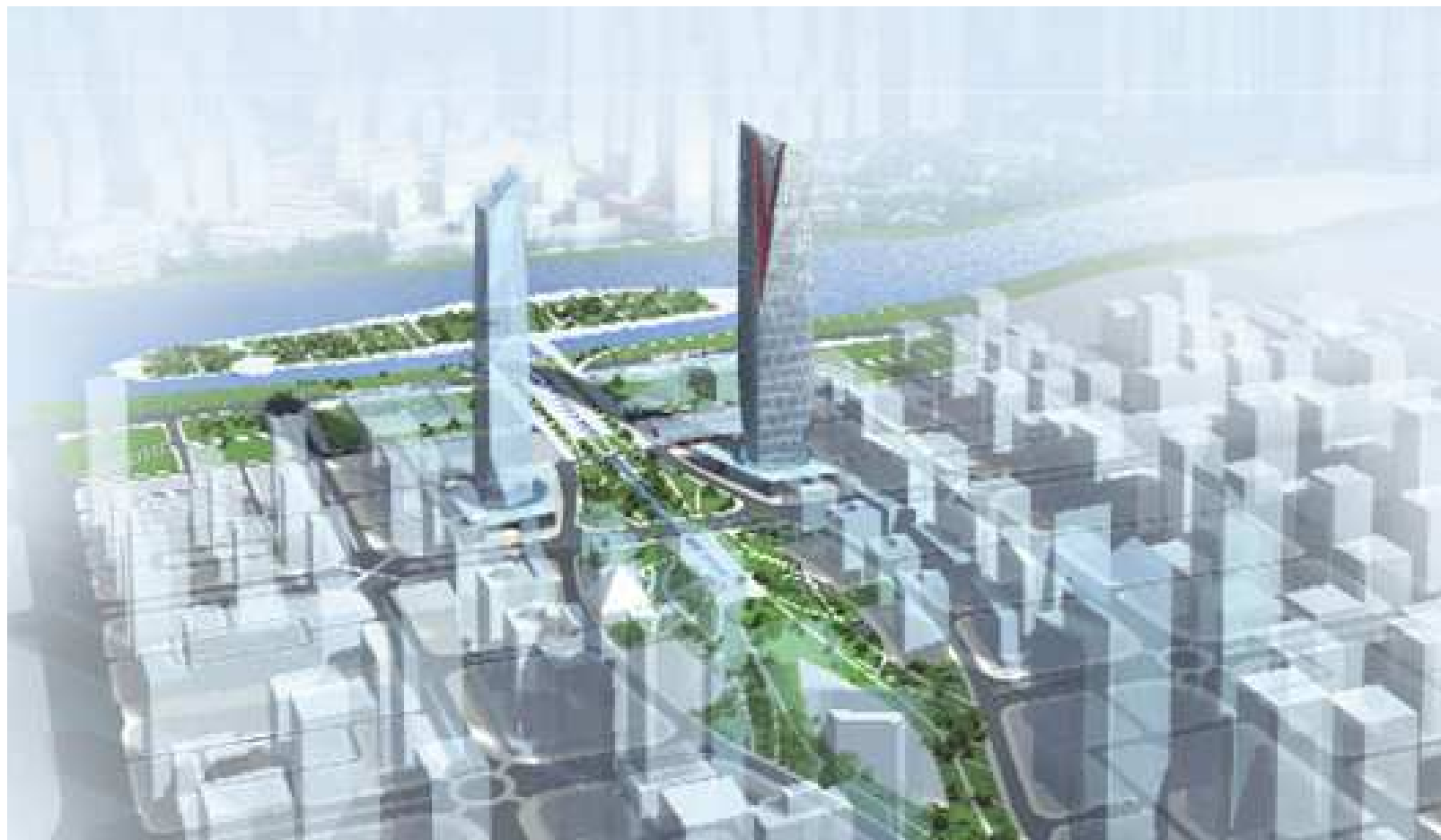
Reasons:

- Al Kaida attacks in the USA
- More and more highly sensitive technology in office buildings (server technology...)
- Unabated trend to high-rise buildings in large cities
- Construction technology developments permit “discreet” security measures
- Strong demand in the Arab world, in the USA and the UK



T-Online HQ, Darmstadt

Secuplex® 'High-end security'



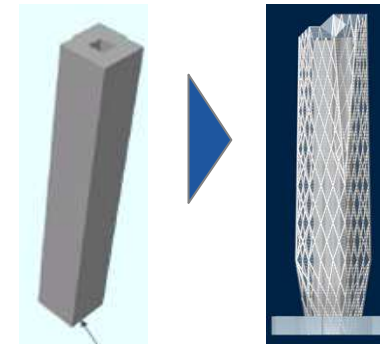
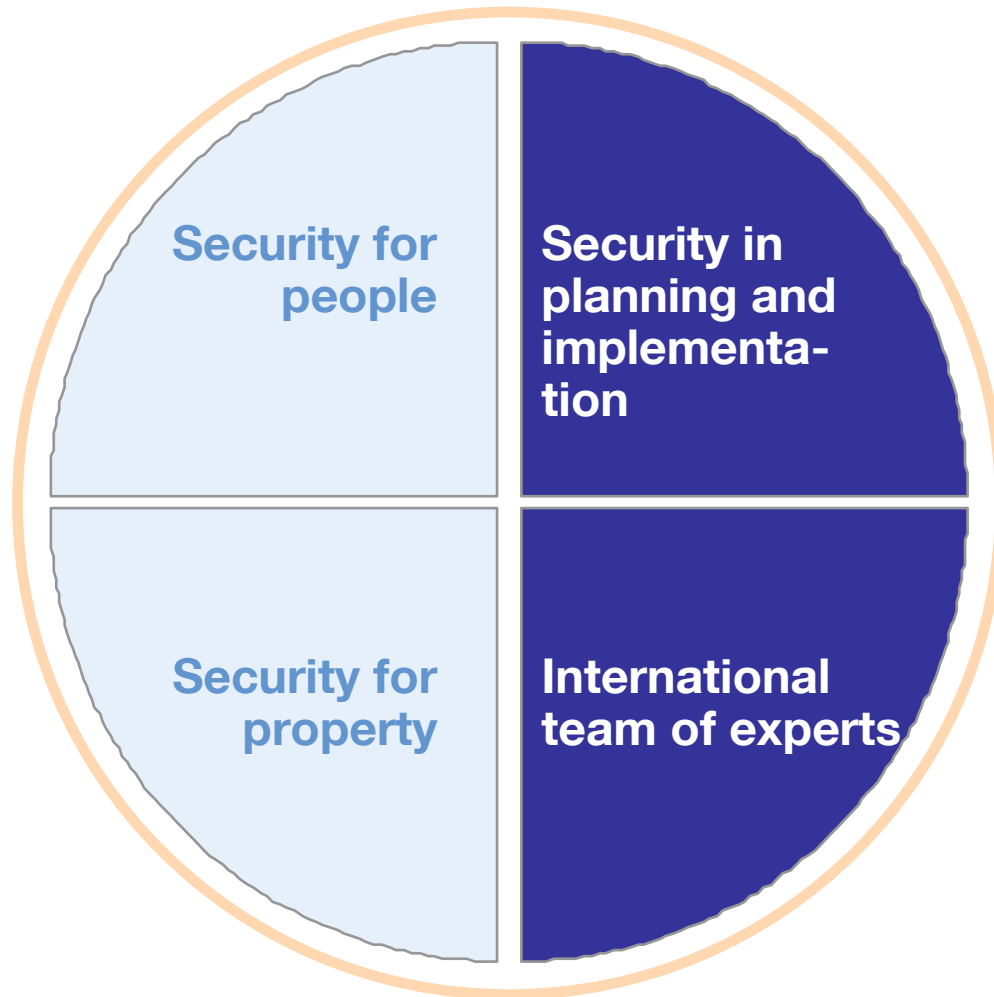
Secuplex®



Comprehensive security and safety for people and property.

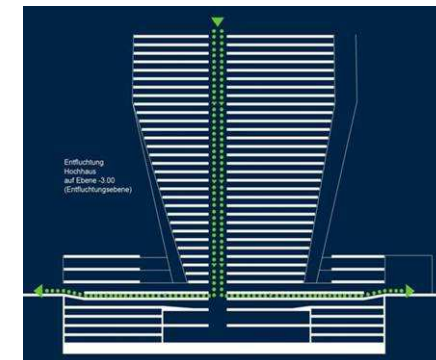
- Secuplex is an innovative type of high-rise building.
- It provides seamless security without restricting quality of life.
- Secuplex is a prototype for other projects.

Modular Security System (MSS)



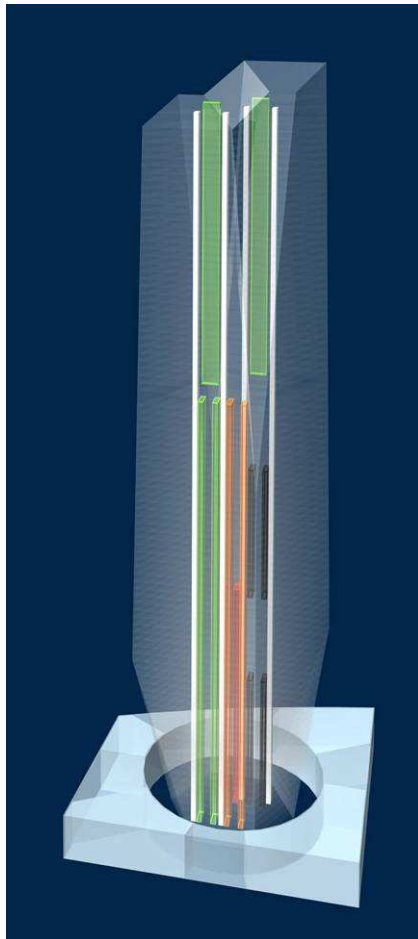
High-end security construction

Thick wall or 'Secuplex'





Security for people



The basic design for the security and safety of individuals comprises **four fundamental elements**:

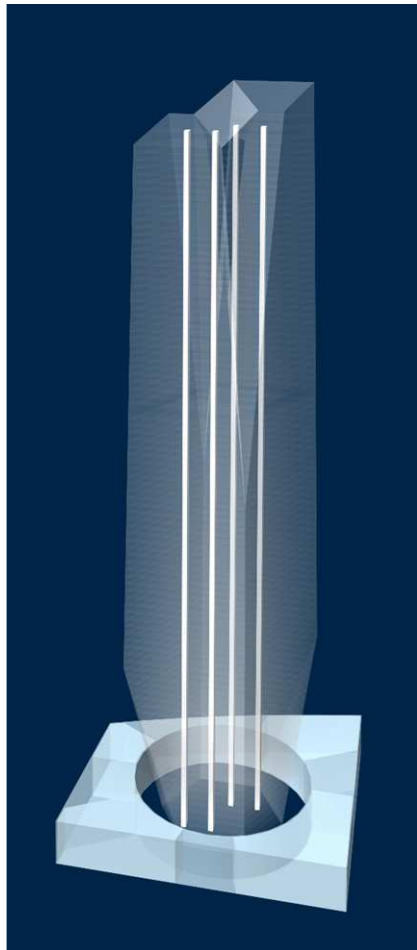
- **Static stability** of the building and the structural components
- **Secure supply systems** (power, fresh air, water, cooling, heating)
- **High-end security emergency/escape concept**
- **Access security**

Made-to-measure solutions:

- **High-risk areas** Protection for especially sensitive areas



Security for property



Secuplex's high-end security concept protects not only individuals but also the property of occupants and investors.

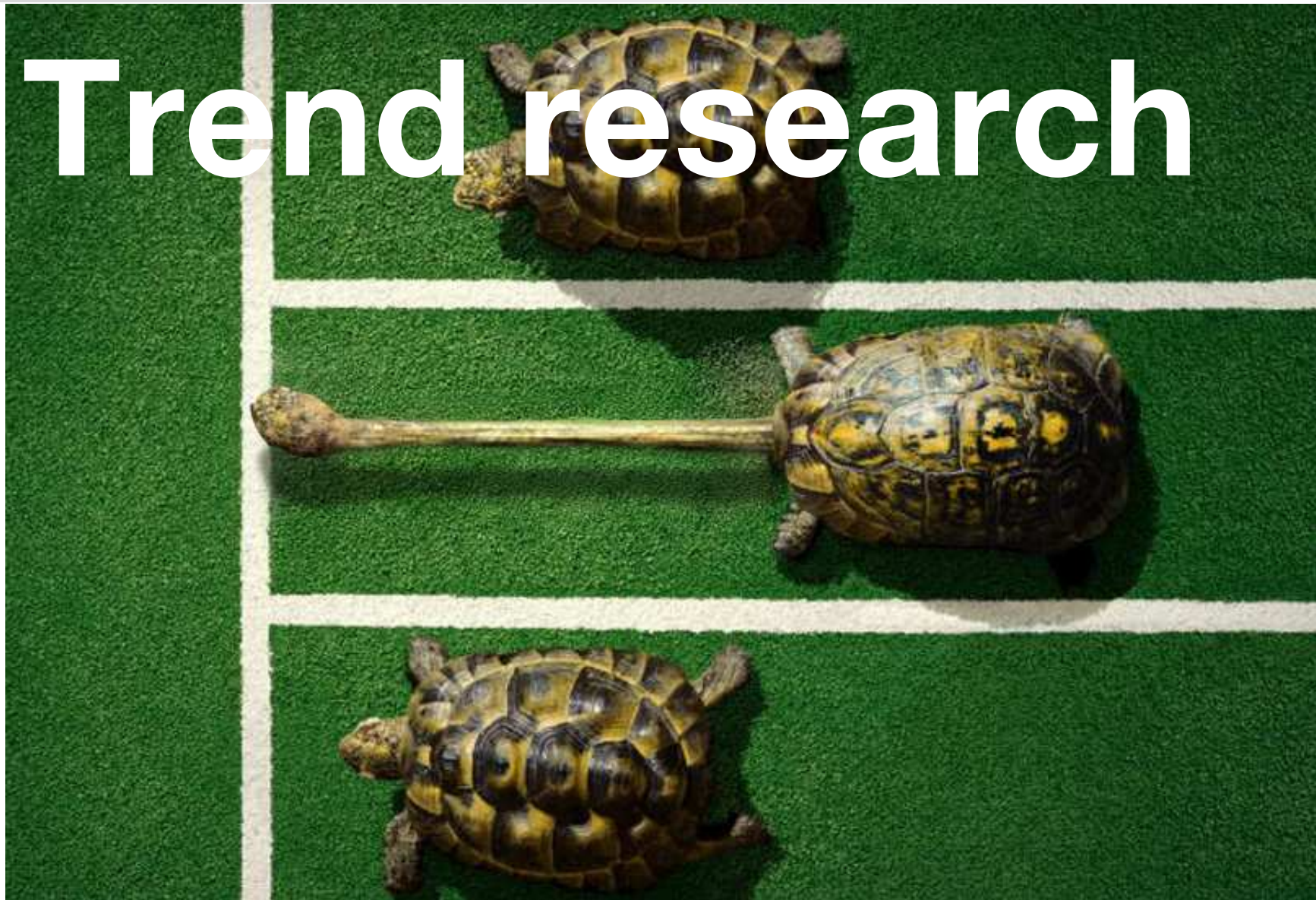
Secuplex stands for:

- Durability and resistance-quality of tangible assets

Individual made-to-measure security systems:

- **Data and information protection**
 - Protection against espionage, theft of information and bugging
 - Tap-proof rooms with line-of-sight protection
 - Manipulation-proof data lines and voice connections
- **High-risk areas** – Protection for especially sensitive areas

Trend research



Disclaimer

“Certain of the statements contained herein may be statements of future expectations and other forward-looking statements that are based on management’s current views and assumptions and involve known and unknown risks and uncertainties that could cause actual results, performance or events to differ materially from those expressed or implied in such statements. In addition to statements that are forward-looking by reason of context, the words “may,” “will,” “should,” “expect,” “plan,” “intend,” “anticipate,” “believe,” “estimate,” “predict,” “potential,” or “continue” and similar expressions identify forward-looking statements. Actual results, performance or events may differ materially from those in such statements. The Company assumes no obligation to update any forward-looking statement.”

Financial calendar and IR contact

17 Nov 05	Q3 results 2005 and Conference Call
16 Mar 06	Full year results 2005 and Analysts' and Investors' Conference
10 May 06	General Shareholders' Meeting
15 May 06	Q1 results 2006 and Conference Call

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