

YTL Construction UK

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CEO – YTL Construction UK

CECA South West Members Meeting
1 April 2026



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MONDAY 31 MARCH 2002

90 PENCE

The Daily Telegraph

WHO THE HELL ARE YTL?



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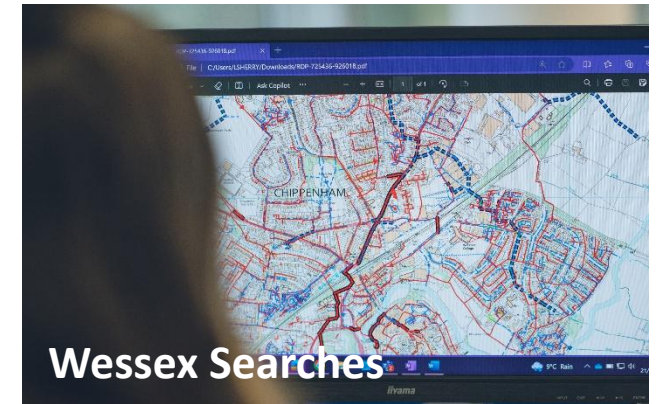
£27 Billion of assets



YTL IN THE UK

£4.6 billion of assets

Investing over £4 billion in the next 5 years



YTL Construction UK

New construction company bringing together expertise and capabilities from across the group

Industry leading training and apprenticeship programmes

£4 billion pipeline of committed work over the next five years:

- Brabazon site infrastructure
- Brabazon homes, offices, hotels, retail, town centre
- Arena complex
- UK water and waste water infrastructure

Multiple diverse business including:

- YTL Plant and Fleet
- YTL Enterprises
- YTL Infrastructure
- YTL Solutions
- GenEco
- Turnbull

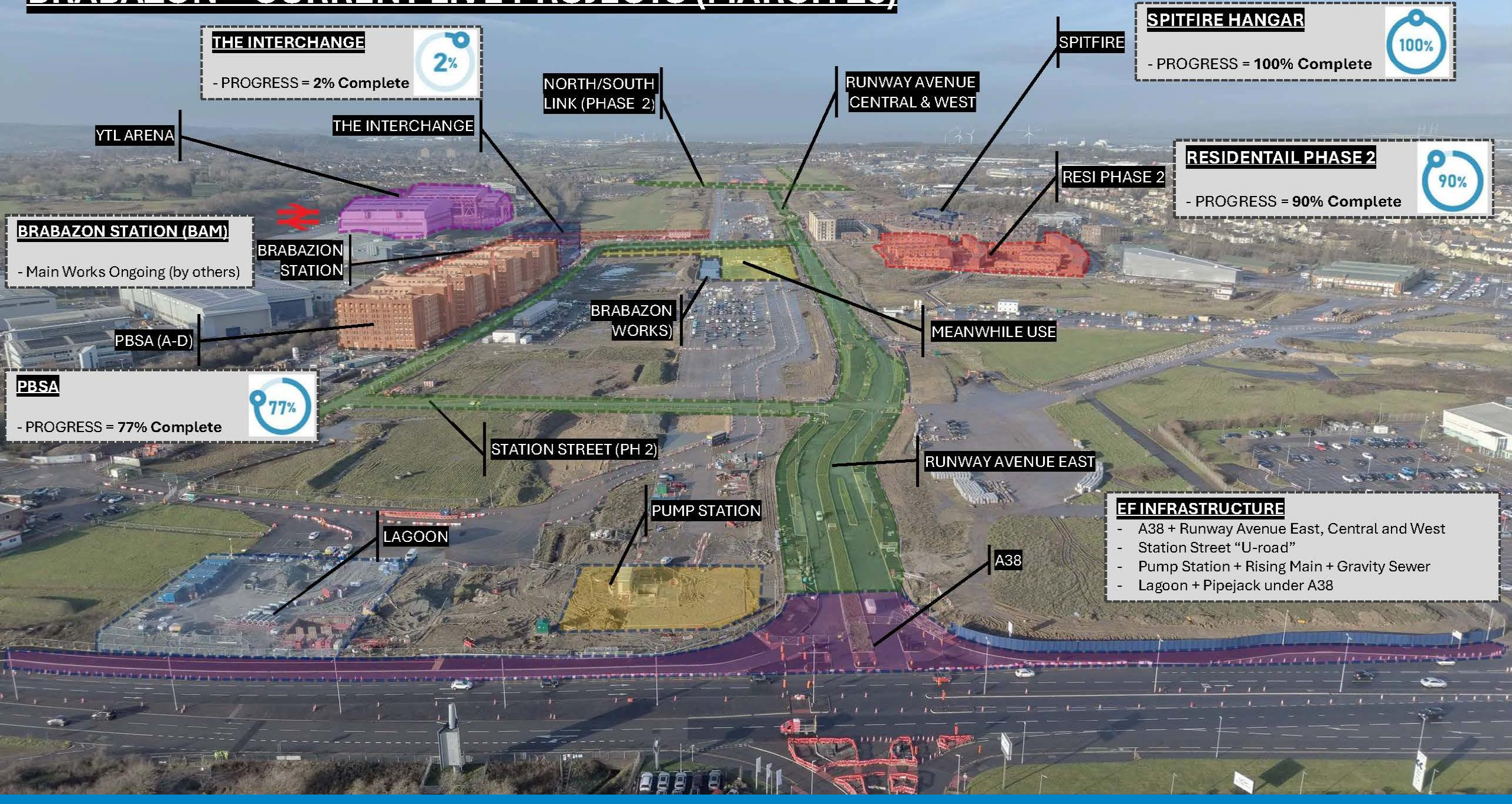
What are we Building?

- A £2bn forward investment programme for Wessex Water's AMP8
- A 'new town' development at Brabazon, with 6,500 houses, 3 schools, over 60 acres of commercial space and student accommodation and university district
- YTL Live, a conference and exhibition center with the flagship 20,000 capacity Aviva Arena
- Developing our offsite build capability, as well as our Solutions business
- Growing our Plant and Fleet business, expanding into new markets
- Delivering excellence through our UK Procurement Hub





BRABAZON – CURRENT LIVE PROJECTS (MARCH 26)




THE INTERCHANGE
- PROGRESS = 2% Complete



SPITFIRE HANGAR
- PROGRESS = 100% Complete



RESIDENTIAL PHASE 2
- PROGRESS = 90% Complete



BRABAZON STATION (BAM)
- Main Works Ongoing (by others)

PBSA
- PROGRESS = 77% Complete



EF INFRASTRUCTURE

- A38 + Runway Avenue East, Central and West
- Station Street "U-road"
- Pump Station + Rising Main + Gravity Sewer
- Lagoon + Pipejack under A38

YTL ARENA

THE INTERCHANGE

NORTH/SOUTH LINK (PHASE 2)

RUNWAY AVENUE CENTRAL & WEST

SPITFIRE

RESI PHASE 2

BRABAZON STATION

BRABAZON WORKS

MEANWHILE USE

PBSA (A-D)

STATION STREET (PH 2)

RUNWAY AVENUE EAST

LAGOON

PUMP STATION

A38

Starting 2026

- Station Office
- Superstore office and MSCP
- Lab building
- The Park



CONFERENCE & EXHIBITION

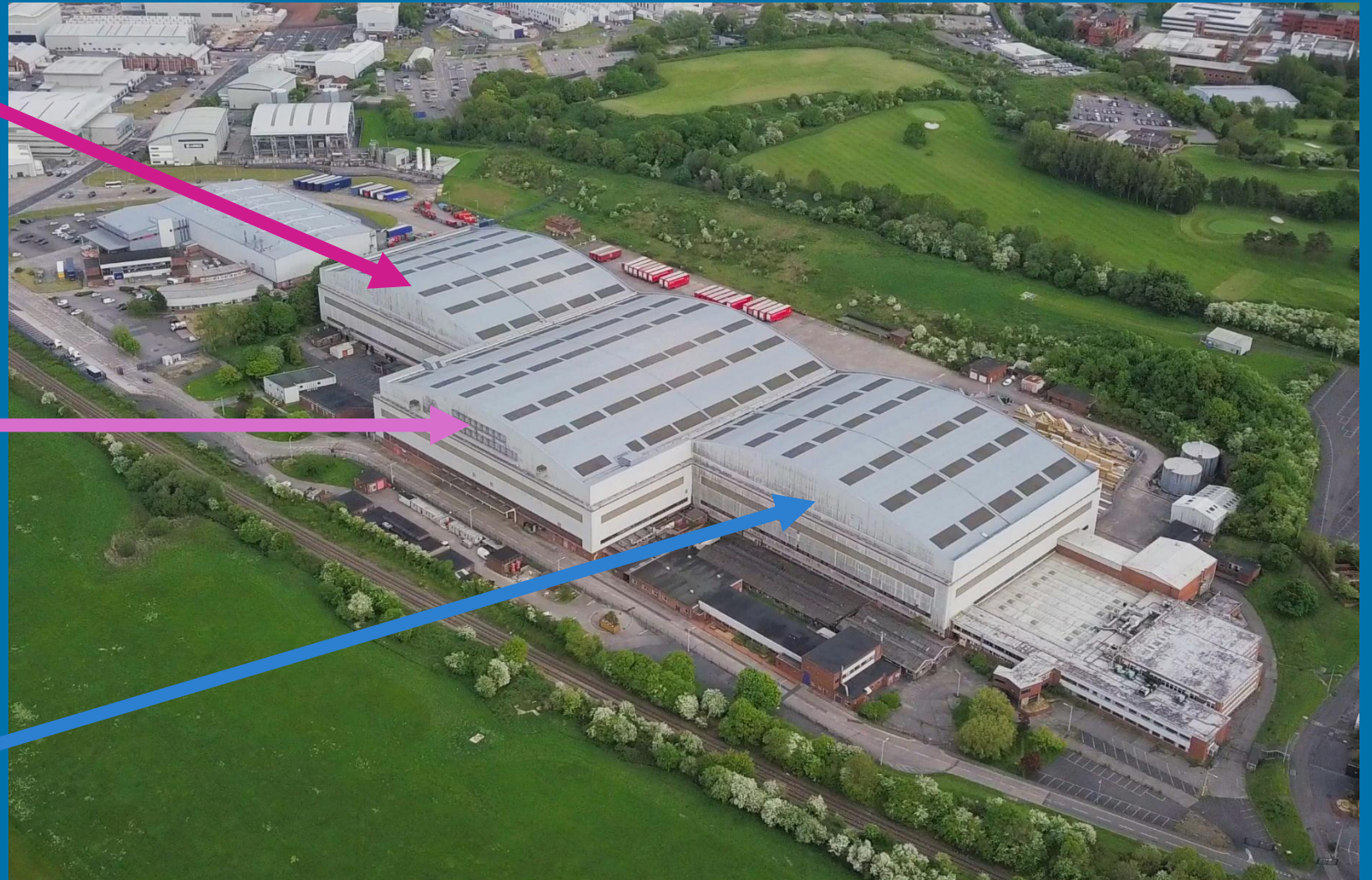
A flat floor, pillarless space for exhibitions, conferences, conventions, trade shows, corporate dinners and much more.

ARENA

A world-class, 20,000 capacity indoor arena hosting 140 events annually.

DIGITAL LEISURE

Mixed use, next generation leisure hub.



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AVIVA ARENA



A Vision for Water

Building the Future of Water Infrastructure in the UK

- **A unique owner-operator perspective** – 24 years partnering with Wessex Water, delivering over £2bn in water infrastructure
- **End-to-end capability** – From design and construction through to operational excellence and customer service
- **Long-term commitment** – £2bn forward investment programme demonstrating sustained partnership
- **Proven track record** – Wessex Water: 3x Queen's Award winner for Sustainable Development, consistently top-rated by Ofwat
- **Our mission: Transform water infrastructure delivery for a resilient, sustainable future**



Redefining Construction in Water

Building the Future of Water Infrastructure in the UK

- **We understand operations** – Not just constructing assets, but building infrastructure that performs for decades
- **Innovation-led delivery** – Pioneering soil stabilisation, blockchain water credits, AI-driven sewer monitoring
- **Safety-first culture** – Zero harm commitment across all projects and operations
- **Sustainability embedded** – Every project designed for net-zero pathway and biodiversity net gain
- **Community-focused** – Working with local communities, creating jobs, protecting heritage



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Climate and Net Zero

Racing Against Time

- Net-zero by 2030 – Just 4 years to decarbonise operations across the entire sector
- Climate volatility – 40% increase in extreme weather events impacting water availability and flood risk
- 45% reduction in storm overflow spills mandated by 2030 from 2021 baseline
- 3GW of renewable energy required across the sector to achieve operational net-zero
- Nature-based solutions – Biodiversity Net Gain (10% minimum) now mandatory for all developments



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Ageing Assets and Regulation

Infrastructure Under Pressure

- **Aging infrastructure** – Much of the UK's network dates from Victorian era, designed for 19th century demands
- **Regulatory intensity** – Multiple regulators (Ofwat, Environment Agency, DWI) with increasingly stringent targets
- **Water quality standards tightening** – New PFAS limits and lead reduction
- **Population growth** – 10 million more people by 2050 requiring water and wastewater services
- **Investment backlog** – Decades of underinvestment now requiring urgent catch-up

Public Trust and Affordability

Rebuilding Confidence

- **Public trust at historic lows** – Water companies facing unprecedented scrutiny and criticism
- **Affordability crisis** – Average bills rising to fund £104bn investment while cost-of-living pressures mount
- **Transparency demanded** – Real-time monitoring, open data, and accountability now expected as standard
- **Performance penalties** – Ofwat can now ban executive bonuses if environmental standards not met
- **Social contract** – Must demonstrate value, environmental stewardship, and community benefit



End to End Capability

The Owner-Operator Advantage

- **Unique perspective** – We don't just build it, we operate it.
- **Design for operations** – Every asset designed with operational lifecycle in mind
- **Real-world experience** – Understanding what actually matters: reliability, maintainability, efficiency
- **Proven delivery** – Major projects delivered on time and budget:
 - Avonmouth WRC: £100m expansion for Bristol's 20-year growth
 - Holdenhurst WRC: 9 million litre storm tank protecting Bournemouth beaches
 - Somerset Levels: £5m integrated constructed wetland (nature-based solution)



Understanding What Matters

Deep Water Sector Expertise

24 years of water sector focus – Not generalist contractors, but water infrastructure specialists

Operational insight – We know the pressures: DWI compliance, EA permits, customer service standards

Asset performance – Designing for whole-life cost, not just capital delivery

Environmental outcomes – Understanding nutrient removal, storm overflow reduction, biodiversity enhancement

Customer impact – Minimising disruption, maintaining supply, protecting public health



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Innovation and Safety

Leading the Way

Innovation in Action:

- Soil stabilisation trials at Leyhill WRC – 30% carbon savings (15,393kg CO2e), £130k cost reduction
- AI-driven sewer monitoring – StormHarvester predictive analytics, Headlight AI LiDAR robotic surveys
- Blockchain water credits – Pioneering transparent environmental impact tracking
- Modular construction – 50% timeline reduction, 70-80% carbon cuts vs. traditional methods
- Learning from other sectors

Safety Excellence:

- Zero harm commitment – No compromise on worker or public safety
- RoSPA Award Winners
- Proactive risk management – Digital safety tools, real-time monitoring, continuous improvement culture



Our Procurement Approach

Programme Procurement

- Dedicated programme buyers focused on understanding requirements for the similar assets and services
- Bulk advanced procurement of critical assets
- Driving standardisation and early decisions
- Visibility of requirements to our supply chain
- Working together to unlock manufacturing capacity
- Focused expediting and advanced planning for deliveries



Our Procurement Approach

Developing new supply chain

- Collaborating with design to open opportunities for new technologies
- Encouraging supply chain into the sector (Dynamic Market for Process Safety Design)
- Utilising our overseas KL Procurement Hub to unlock UK capacity issues
- Maintaining our established relationships whilst growing new opportunities



Addressing Capacity

Working Together to Deliver

100,000 new workers needed by 2030 – Sector-wide skills shortage requires collaborative approach

Long-term partnerships, not transactional contracts – Sustainable relationships enable capacity planning

Early Contractor Involvement (ECI) – Leveraging supply chain expertise from design stage

Integrated supply chain – Strategic partnerships with specialist suppliers for programme delivery

Visible programmes of work – Providing supply chain confidence for investment in capacity

Accelerating Delivery

Programme-level procurement – Moving from project-by-project to strategic programme buying

Standardisation – Repeatable "product-driven" delivery models enabling Off-Site Build (OSB) and modular solutions

Digital platforms – Shared tools for proactive programme management and real-time collaboration

Upskilling workforce – Investing in training, apprenticeships, and attracting new talent to water sector

Streamlined processes – Reducing bureaucracy, empowering teams, accelerating decision-making

Developing solutions with our partners for mitigating capacity constraints

