



Summary and Conclusion

Duke Austin, President & Chief Executive Officer

Strategic Imperatives



**Focus On Safety
Excellence**



SAFETY BRINGS YOU HOME

**Maintain High
Performance
Culture**



**Strengthen and
Grow Our Core**



**Continue to
Innovate**



**Organic Growth
Strategic Acquisitions**

Profitable Growth

Strong Backlog, Favorable Industry Dynamics & Opportunities



End Market Trends & Opportunities

Electric Power

- Significant electric T&D infrastructure investment needed for many years
 - Aging infrastructure
 - Reliability
 - Favorable regulation
 - Change in generation mix
 - Regional grid congestion
 - Sub-transmission interconnections
 - System hardening initiatives
 - More ...

Oil & Gas

- Production of natural gas and liquids expected to grow over the long-term
- Unconventional formations in North America and Australia require significant pipeline and related infrastructure
- Natural gas distribution and pipeline integrity programs

Grow the Base Business

Expand EPC Capabilities

Grow Telecom Operations

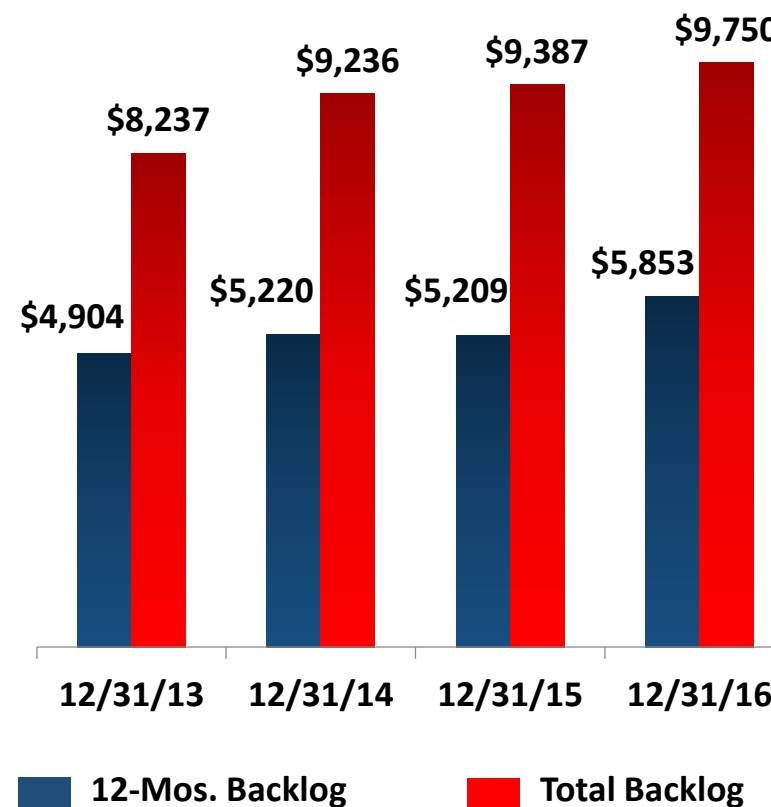
Infrastructure Solutions

Organic Growth & Acquisitions

Adjacent & Geographic Growth Opportunities

Strong Backlog Supports Positive Outlook

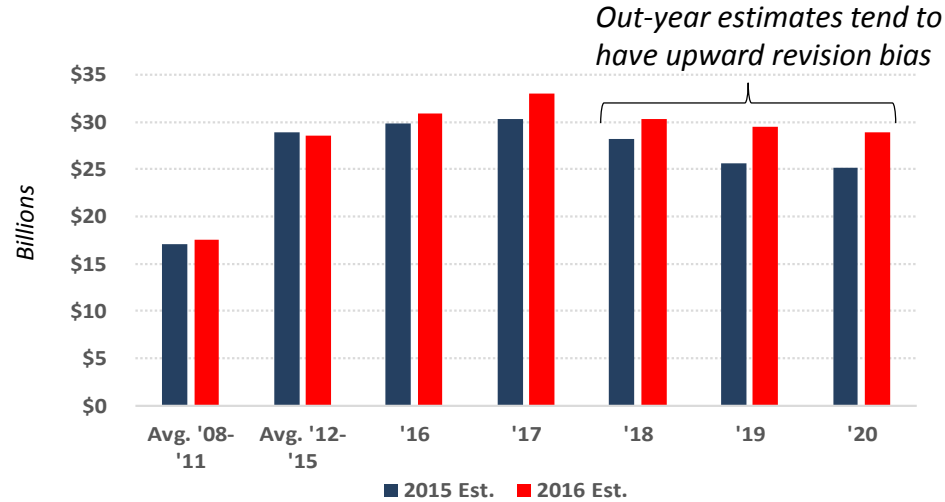
(\$ in millions)



Renewed Opportunity For Multiyear Growth Cycle

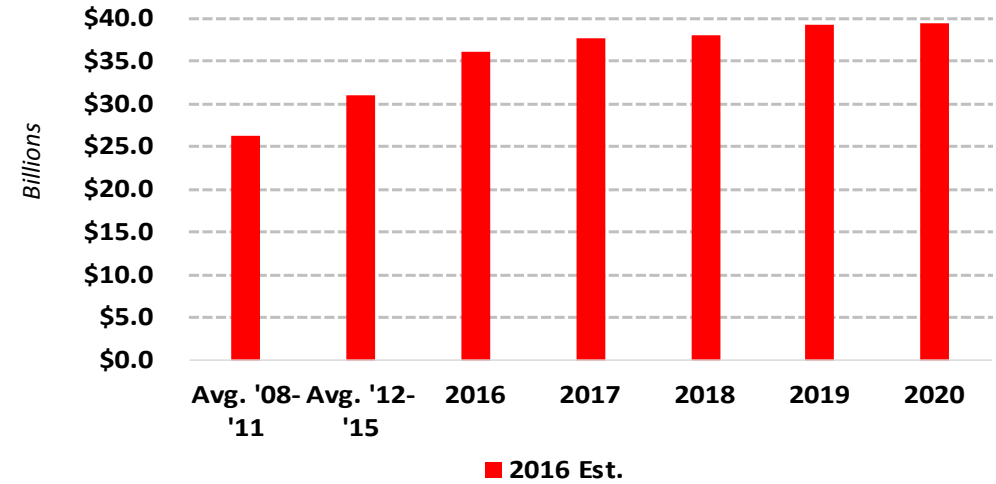


Est. North American Transmission Spending



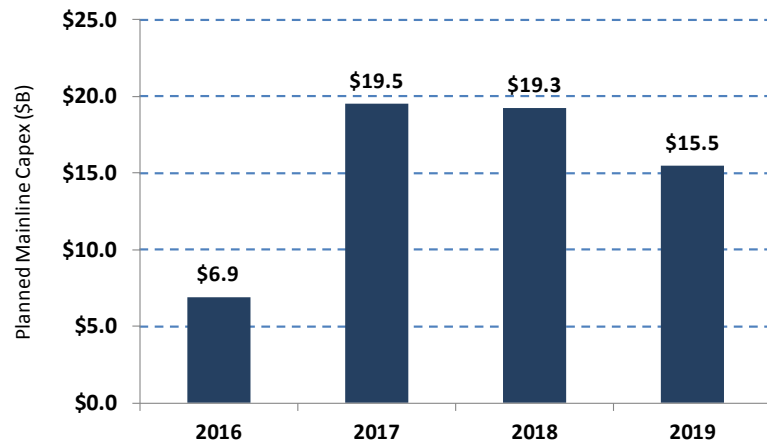
The C3 Group, August 2016

Est. North American Distribution Construction Market



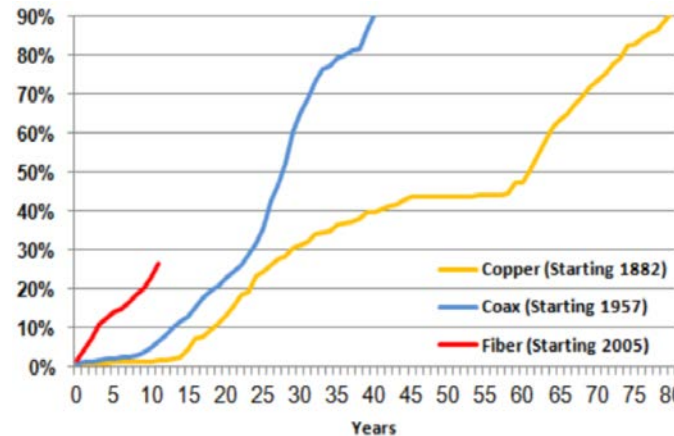
Source: The C Three Group, Aug., 2016

North America Major Planned Mainline Projects

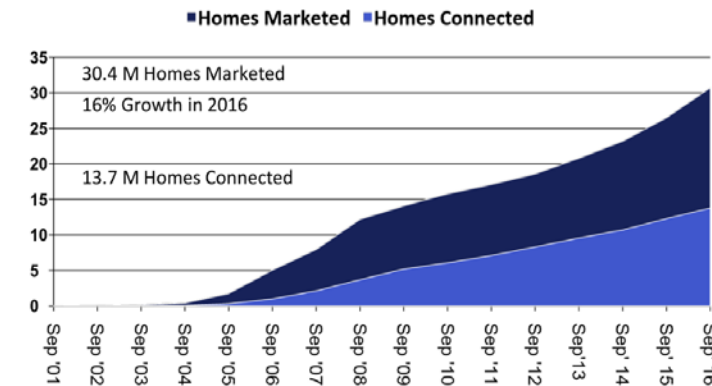


Source: KeyBanc Capital Markets

Significant, Multiyear Fiber Buildout Opportunity in the U.S.



Source: Fiber Broadband Association



Unmatched Resources & Expertise



Electric Power



Service Offering

- Transmission
- Distribution
- Substation
- Engineering
- Energized Services
- Emergency Restoration
- Smart Grid Deployment
- EPC Renewable Generation
- Asset Management

Differentiators

- Largest T&D contractor in North America
- Reputation and Track Record
- Unmatched Solutions Scope and Scale
- Safe Project Execution
- Manpower and Equipment Resources
- Lazy Q Training Facility
- Energized Services
- EPC Capabilities Across All Offerings
- Balance Sheet

Oil & Gas Infrastructure



Service Offering

- Mainline Pipeline
- Shale Midstream Pipeline
- Compression, Metering and Pumping Stations
- Natural Gas Distribution
- Pipeline Integrity
- Pipeline Logistics Management
- Horizontal Directional Drilling
- Storage Facilities

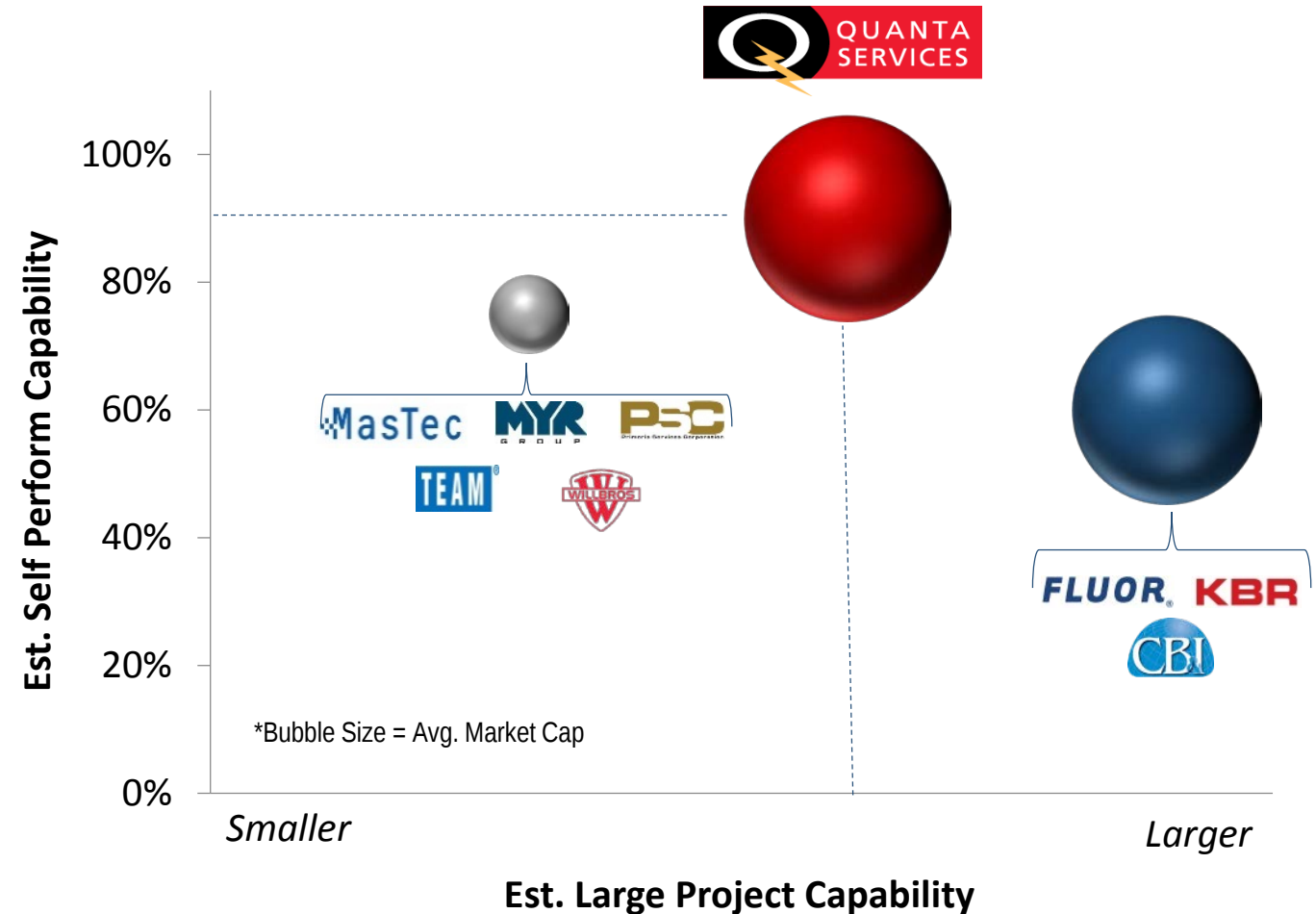
Differentiators

- Largest Pipeline Contractor in North America
- Reputation & Track Record
- Safe Project Execution
- Turnkey Solutions
- EPC Capabilities
- In-House Automatic Welding
- In-House Pigging Technology
- Pipe Logistics Management
- Balance Sheet

Differentiated Competitive Position – In the Sweet Spot



- Quanta is uniquely positioned to meet customer needs versus both specialty contractors and traditional engineering and construction companies
- Customers understand that skilled labor is critical to project success
- Projects are getting larger and more complex and customers are increasingly seeking comprehensive solutions
- Demand for specialty construction resources is high and increasing, but supply is limited
- Quanta has the largest infrastructure specialty contractor workforce in North America, +28,000 employees globally
- Quanta has strategically invested in engineering and program management to provide true complete engineering, procurement and construction (EPC) solutions



Foundation For Growth & Improved Profitability



Operational & Safety Excellence



Multi-Year Growth Opportunities



Innovative, Industry Leading Solutions



Scale & Scope



Financial Strength



QUANTA SERVICES

Investor Day Key Takeaways



There is opportunity for a renewed multiyear growth cycle

Quanta is the leading specialty infrastructure solutions provider in the markets we serve

Quanta is executing on strategic initiatives that differentiate us in the marketplace and will allow the company to profitably grow over the near- and long-term

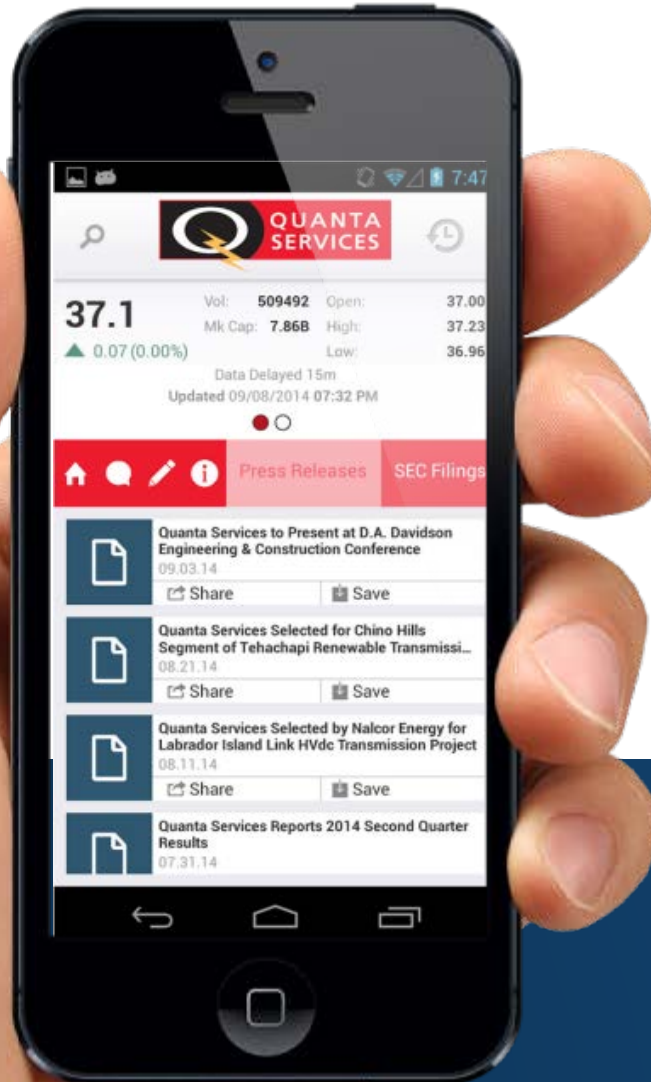
Our financial strength and disciplined and opportunistic approach to capital allocation is a strategic advantage

The background of the slide is a grayscale photograph. On the left, a large high-voltage electrical transmission tower stands prominently, with several power lines extending from it. In the foreground, a large, dark, cylindrical pipe or tunnel section runs horizontally across the frame. In the distance, another smaller transmission tower is visible, and on the far right, a small windmill can be seen against the horizon. The sky is filled with light, wispy clouds.

Questions and Answers

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