



AAPA – Shifting International Trade Routes

Planning for the Panama Canal Impacts North American Ports

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Port Development Strategies for Panama Canal Expansion

Understand the Opportunity

Growing market / changing trade patterns
Structural change, enabling stakeholder options
Specific customer requirements

Design the Value Proposition

Port / Operator / Carrier / Shipper / Investor Partnership
Customer-centric & focused marketing / service strategy
Remove traditional cost encumbrances

Learn from the Naysayers

New ideas make for good discussion topics
Free consulting advice is available
“Any Given Sunday”

Integrate Sustainability Strategies

Sustainability solutions are not cookie cutter
Long-term, efficient, and balanced
Reduces unique (or diversifiable) risks

Move boldly despite challenging times

Project development lifecycle will exceed economic cycle
Trust the market drivers, long-term trends, due diligence
Take advantage of near-term weakness to catch up



Case Study: North Carolina International Terminal

Greenfield Site



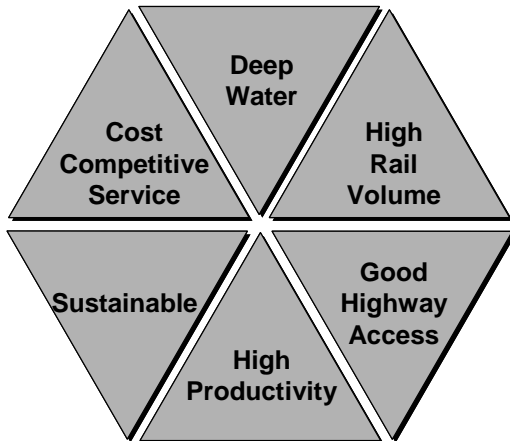
State of the Art Technology



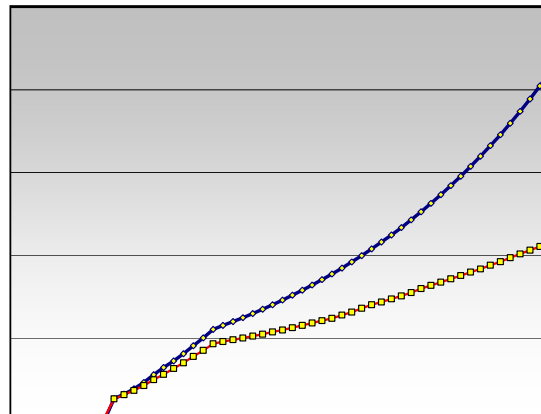
Sustainable Design



Focused Marketing Strategy



Strong Revenue Upside



Partnership





Success Comes From Awareness and Action

- Be in the Thick of It – *Know what's happening*
- Be the preferred provider – *Serve your customers*
- Be proactive - *Play your own game*
- Be a technology leader – *This is a long-term play*
- Be prepared – *Plan, permit, design now*
- Be happy!



About CH2M HILL

- **Worldwide Resources**
 - More than \$5.5 billion in annual revenues
 - More than 25,000 employees
 - 50% of our transportation business is design-build
- **Comprehensive Services**
 - Consulting – (Economics, Finance, Engineering, Environmental)
 - Full Service – (Design/Build, Turnkey)
 - Maintenance / Rehabilitation
- **Industry Leadership¹**
 - #1 in Port & Maritime Services
 - #1 in Program Management
 - #1 in Construction Management
 - #1 in Environmental

¹Engineering News Record - 2007