



# Teaming in Engineering and Construction in the Global Economy

Presented by

**Dr. Terry Curl, PhD, PE**  
Vice President



**CH2MHILL®**

September 2011



# Agenda

- CH2M HILL Overview
- Construction & Engineering Trends
- Major Projects
- Global Strategic Analysis – from “Success to Significant”
  - Existing Market Conditions
  - Market Drivers
  - Strategic Priorities
  - Business Projection
- Experts and Leaders in Engineering & Construction
- Global Penetration Requirements
- Leadership and Management in Engineering & Construction
- Curl’s Top 14
- Summary



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# **CH2M HILL Overview**



# CH2M HILL Today

- Headquartered in Englewood, Colorado
- More than 23,000 employees
- US \$6.3 billion in revenue
- 100 percent employee owned
- Broadly diversified across multiple business sectors
- Performing work in more than 140 countries

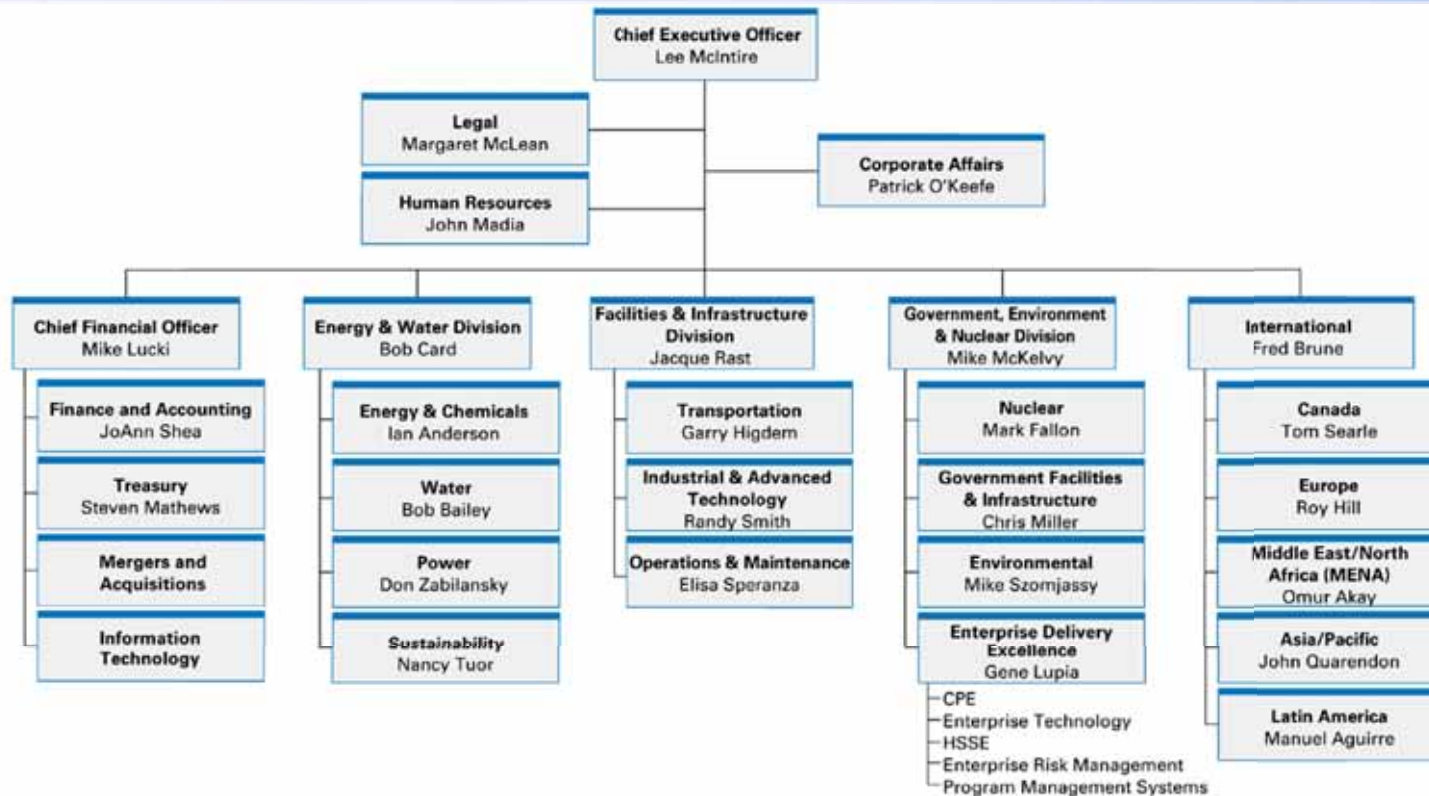


Source: Engineering News-Record, 2010





# CH2M HILL Executive Management Organization



## Board of Directors

Manuel Aguirre	Chad Holliday (OD)	Georgia Nelson (OD)
Bob Bailey	Mike Lucki	Jacque Rast
Bob Card	Lee McIntire (C)	Nancy Tuor
Jerry Geist (OD)	Mike McKelvy	Barry Williams (OD)

C = Chairman OD = Outside Directors

## Joint Council

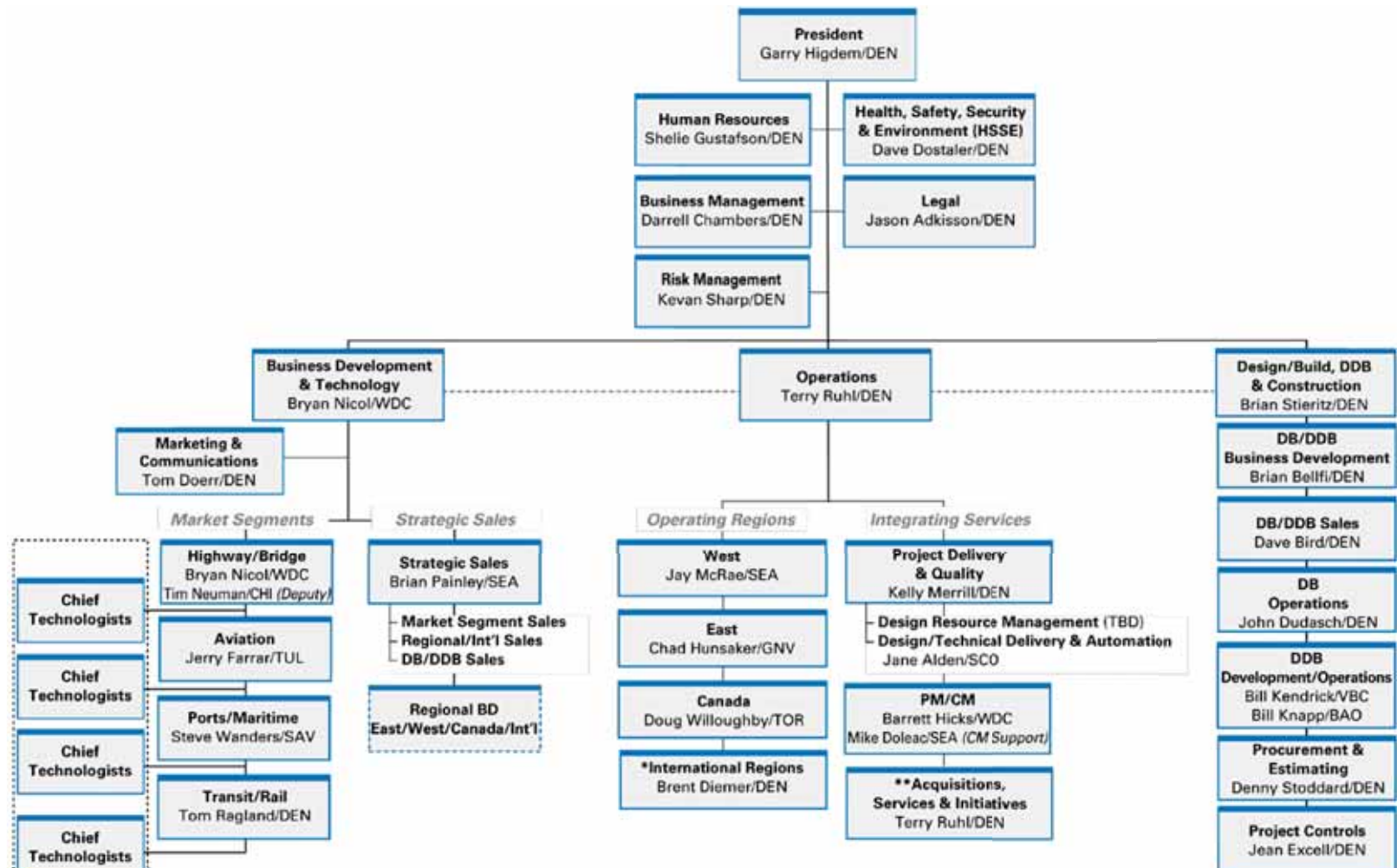
Governance Council		Operations Council	
John Madia	Lee McIntire	Fred Brune	Lee McIntire
Mike Lucki	Margaret McLean	Bob Card	Mike McKelvy
			Jacque Rast

## Operations Committee (OpCom)

Ian Anderson	Bob Card	Mark Lasswell	Lee McIntire	Chris Miller	Randy Smith	Don Zabilansky
Bob Bailey	Mark Fallon	Mike Lucki	Greg McIntyre	Patrick O'Keefe	Elisa Speranza	
Deepak Bhasin	Steve Gelman	Gene Lupia	Mike McKelvy	Jacque Rast	Mike Szomjassy	
Fred Brune	Garry Higdem	John Madia	Margaret McLean	Tom Searle	Nancy Tuor	



# CH2M HILL Transportation Business Group



Technology Board  
and Communities  
of Practice

BD= Business Development  
P3 = Public Private Partnership/Management Consulting  
DB= Design Build  
DDB = Design for Design/Build  
PM/CM = Program Management/Construction Management  
PDD = Project Delivery Director  
HVIS = Horizontal/Vertical Integrated Services  
O&M = Operations & Maintenance

\*Includes Global Market Segment Operations  
- John Maxfield/GNV  
\*\*HVIS - JB Frost/DFB  
P3/Management Consulting & Advisory- Brent Diemer/DEN  
O&M/ITS - Dan Baxter/DEN



# Market Share

## *Number 1 firm in:*

- Environmental
- Manufacturing
- Pipelines
- Program Management
- Semiconductors
- Sewerage and Solid Waste
- Sewer Waste
- Site Assessment & Compliance
- Wastewater Treatment
- Water Supply/Treatment



*Source: Engineering News-Record, July 2008*





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# **Construction & Engineering Trends**



# Construction and Engineering Trends

- Increase in mergers and acquisitions
- Very tough competition
- Global focus
- Lower profit margins than in previous years
- Aging US infrastructure and limited funds to replace or upgrade
- Focus on financially strong countries and clients
- Competitors spending a lot of time and money understanding clients needs
- Very demanding clients
- Clients want to minimize their risk
- More public/private partnerships projects
- Sustainability is very important



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# Major Projects

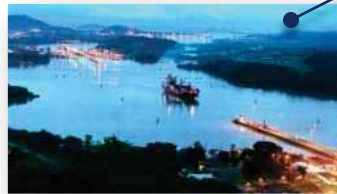




**London 2012  
Olympic and  
Paralympic  
Games**



**U.S. Forces  
Korea Base  
Relocation  
Program**



**Panama Canal  
Expansion  
Program**



**Masdar City**



**Deep Tunnel  
Sewerage  
System and  
Changi Water  
Reclamation  
Plant**



# Panama Canal Expansion Program

*Client: Panama Canal Authority (ACP)*

*Location: Republic of Panama*

## Project Scope

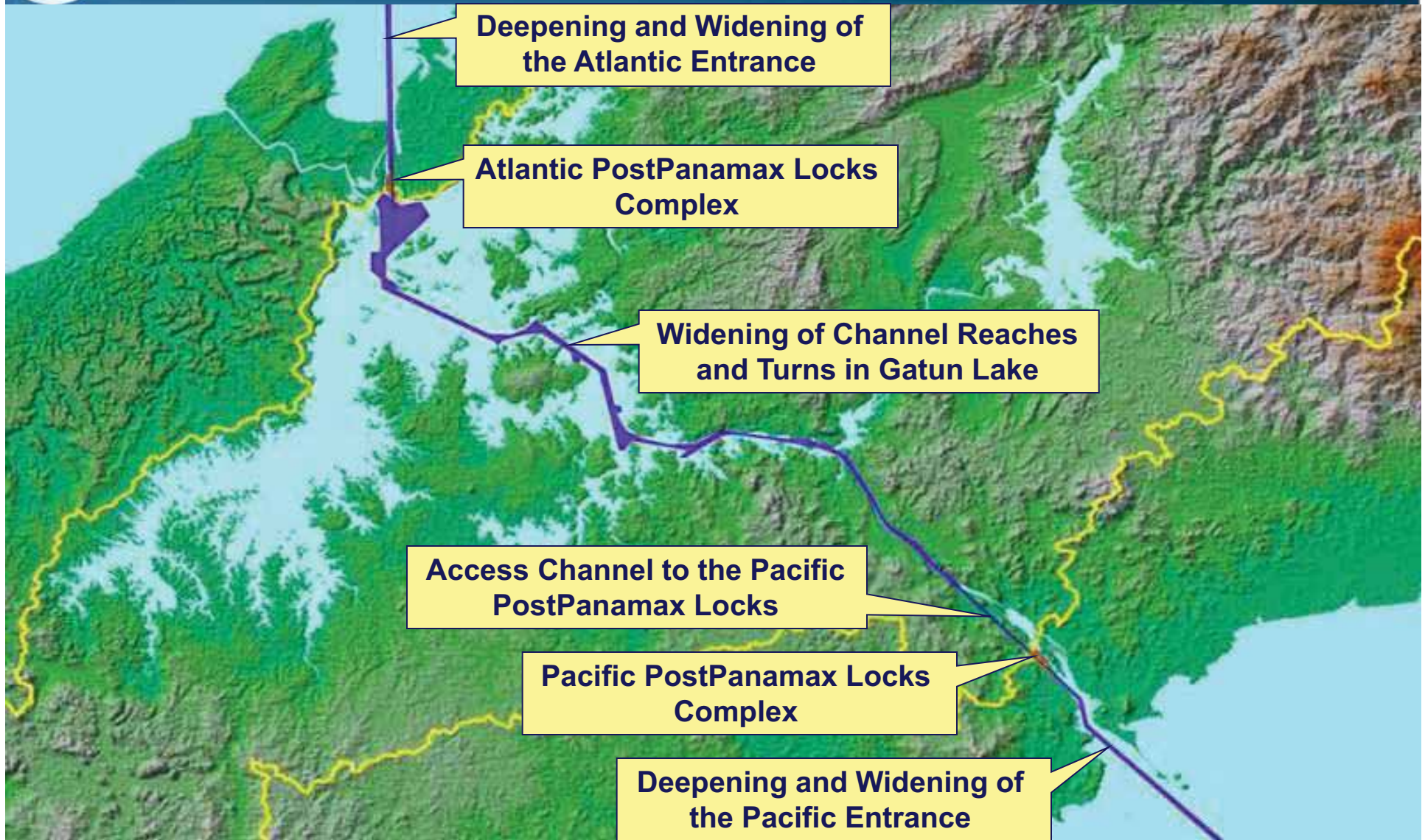
- New locks and navigational channels for both Pacific and Atlantic entrances
- Widening and deepening of Gatun Lake
- Deepening of Gaillard Cut





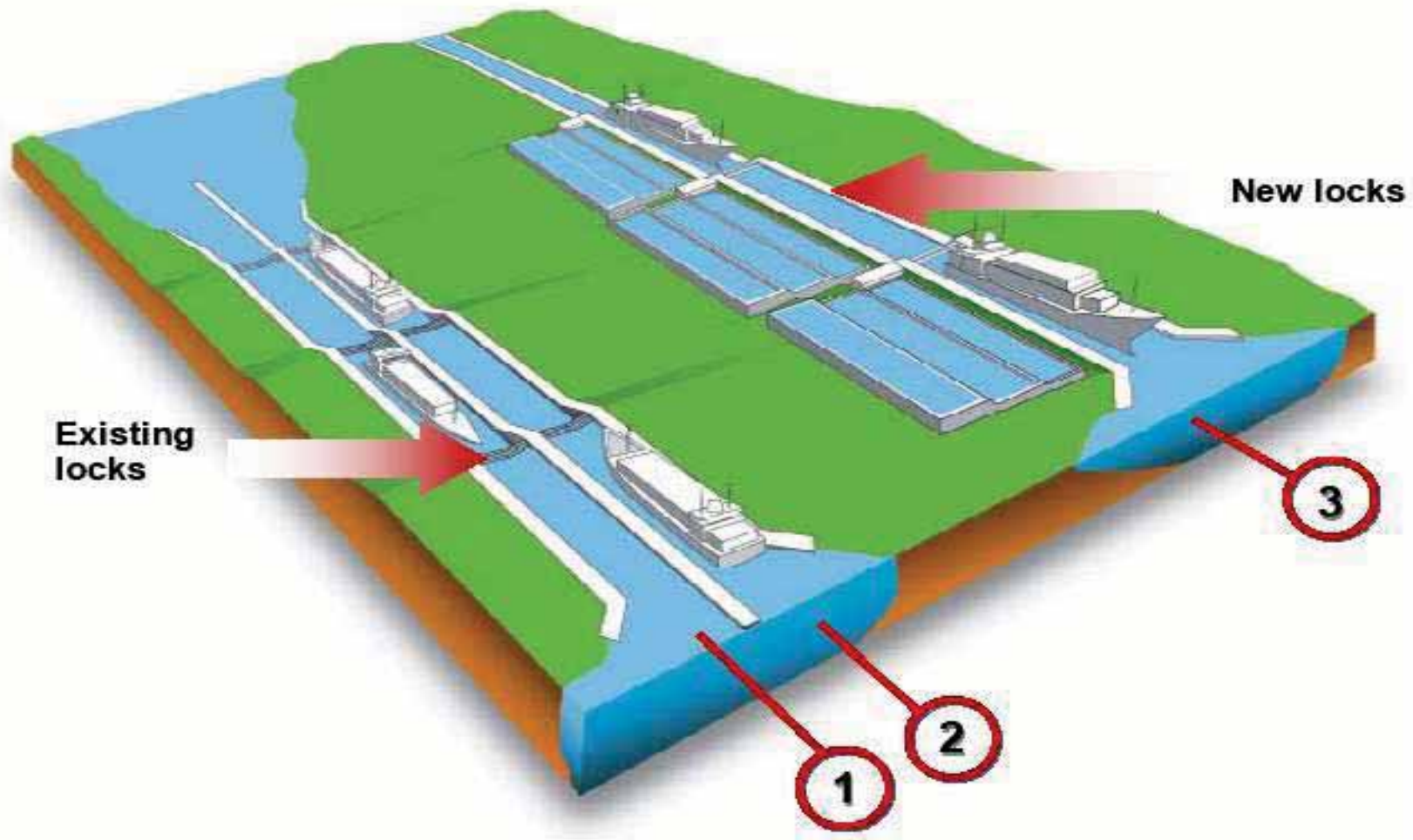


# Panama Canal Expansion Program





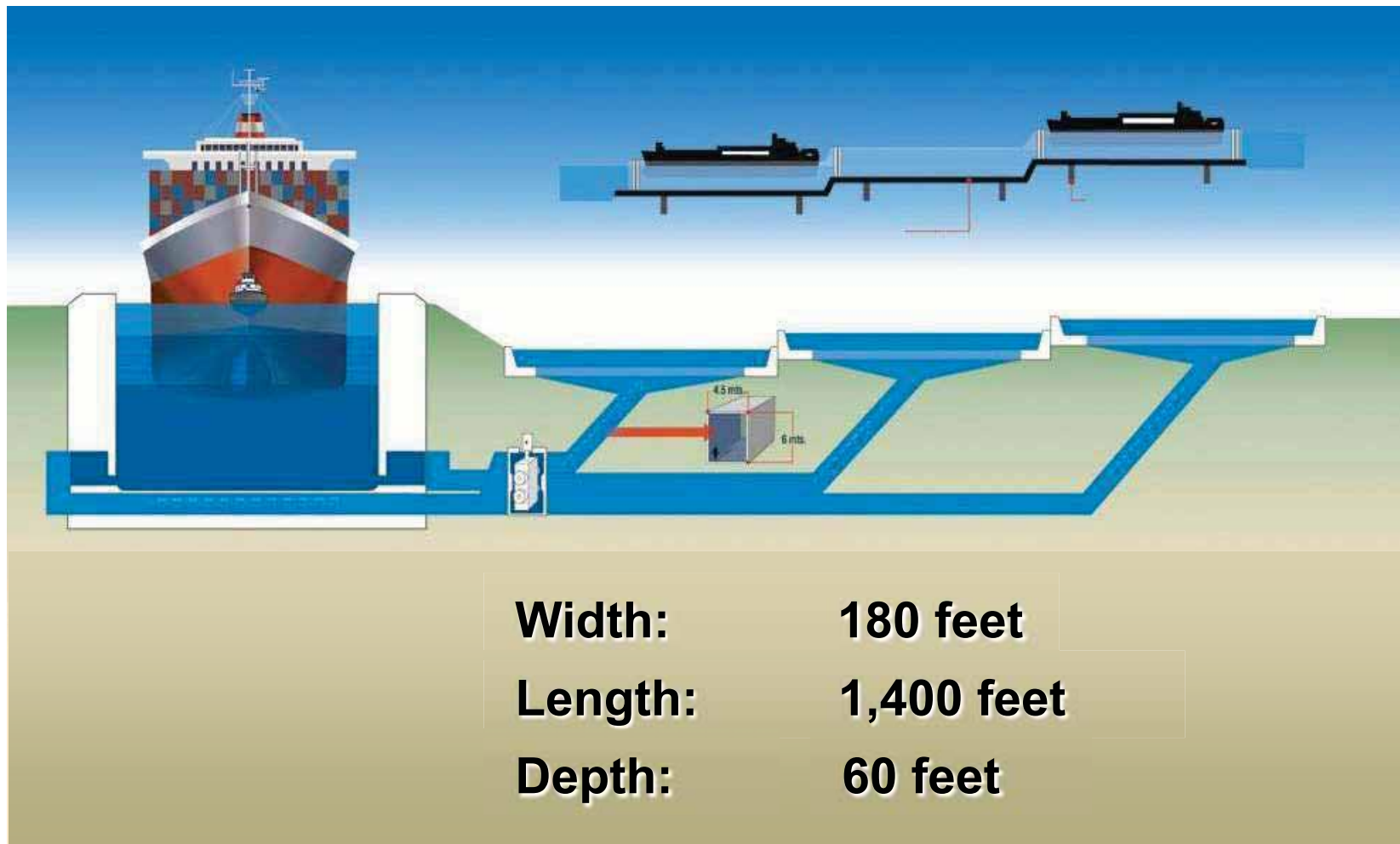
# Panama Canal Expansion Program







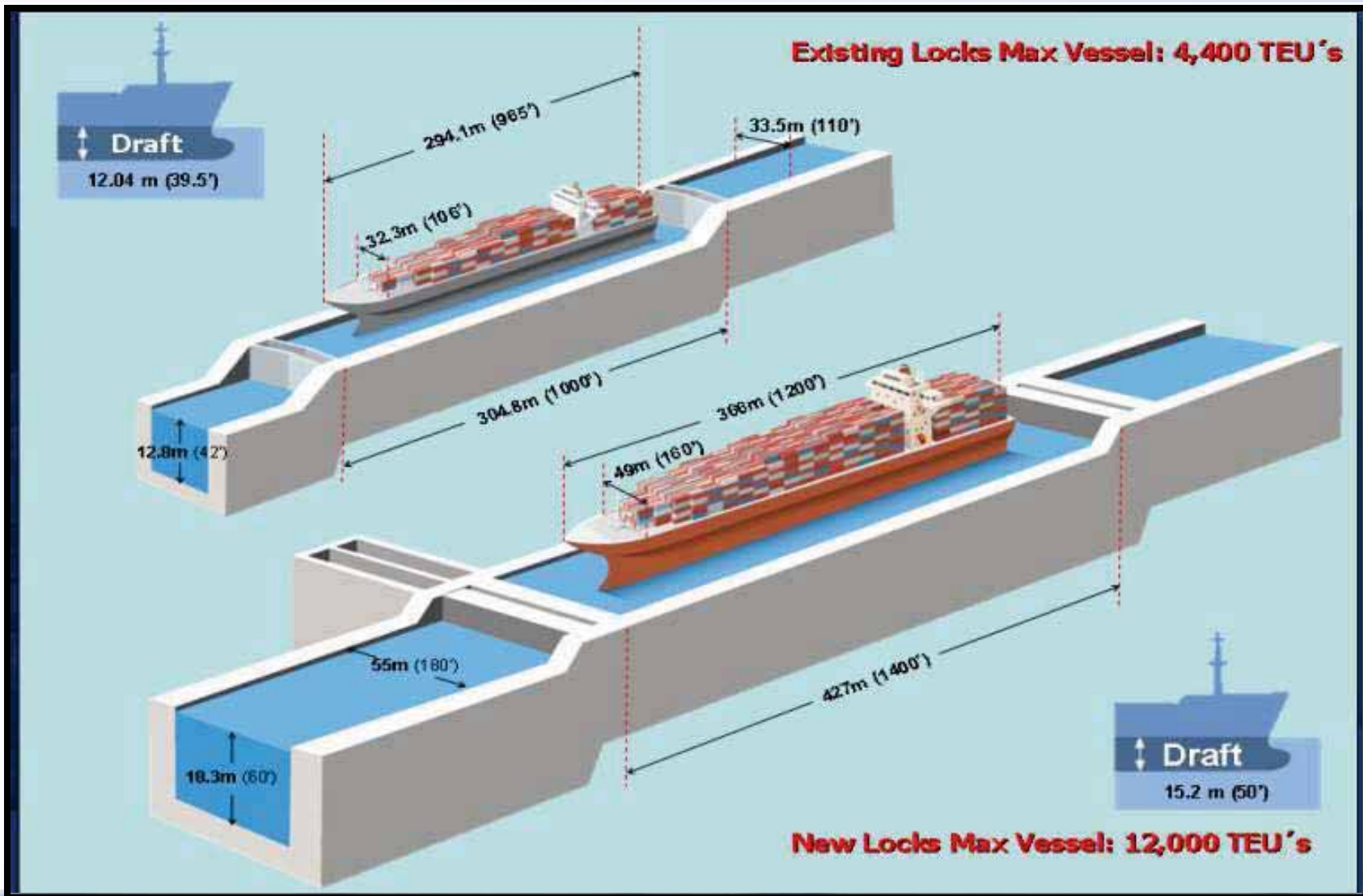
# Panama Canal Expansion Program







# Panama Canal Expansion Program





# Panama Canal





# London 2012 Olympic and Paralympic Games

*Client: Olympic Delivery Authority*

*Location: London, England*

## Project Scope

- 7-year program
- 500-acre Olympic Park
- Robust sustainable legacy plan
- Integrated air-road-rail transportation program
- Strong safety and security program







# London 2012 Olympic and Paralympic Games

## Mobilization Anywhere in the World to Support Client Needs

**\$10.6-B London 2012 Olympic and Paralympic Games:**

**CH2M HILL**

established the design and construction program

management office, mobilizing 30 people within 30 days of the effective date. Within 6 months, the office was fully operational with 140 staff.





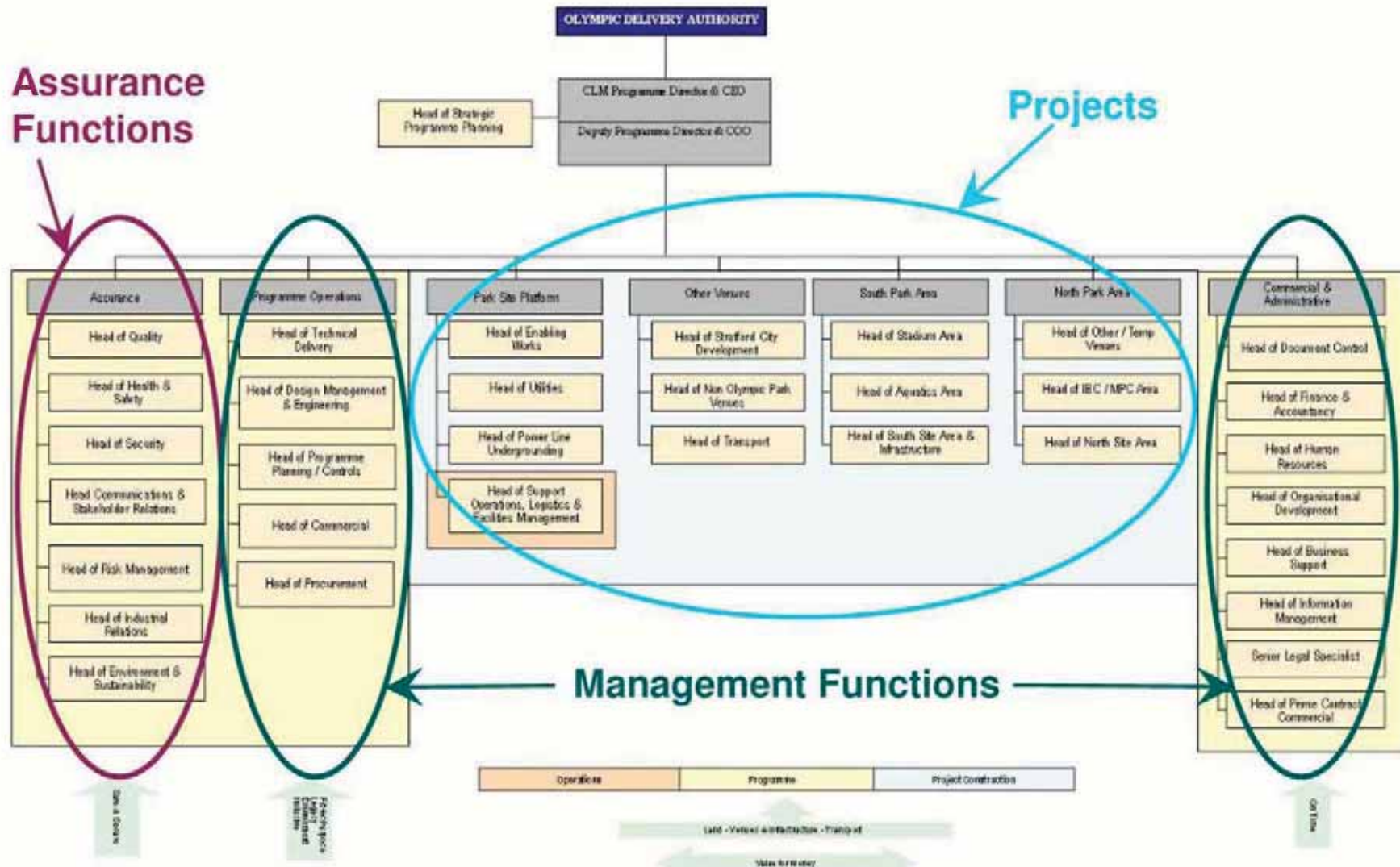
# London 2012 Olympic and Paralympic Games







# London 2012 Olympic & Paralympic Games





- ## Scope of Services

- 





# U.S. Forces Korea Base Relocation Program

*Client: U.S. Department of Defense*

*Location: South Korea*

## Project Scope

- First of its kind program management in Korea requiring program controls, design, construction, and contract/claims management
- Numerous administrative, medical, support and quality of life facilities, and living quarters
- Rapid mobilization, fast-track schedules, and rigorous controls to successfully meet an aggressive program schedule







# Busan New Port

*Client:*

*Location: Busan, South Korea*

## Project Scope

- Construction of a 4-berth, 600-acre container terminal





# Busan New Port







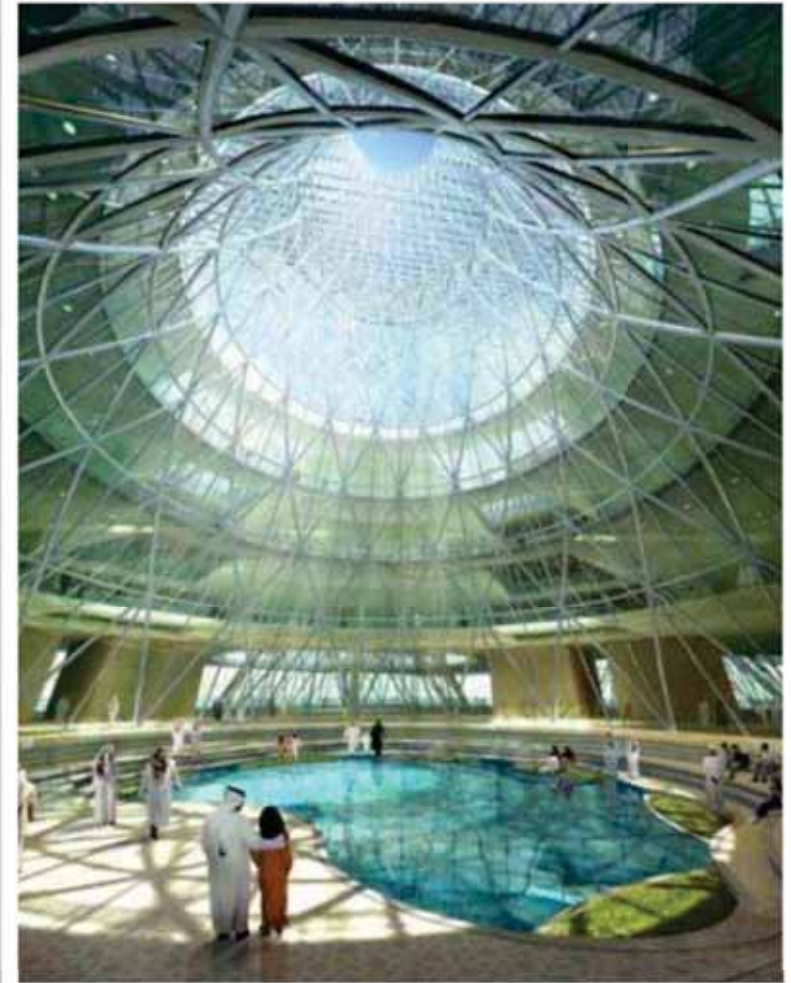
# Masdar City

*Client: Abu Dhabi Future Energy Company*

*Location: United Arab Emirates*

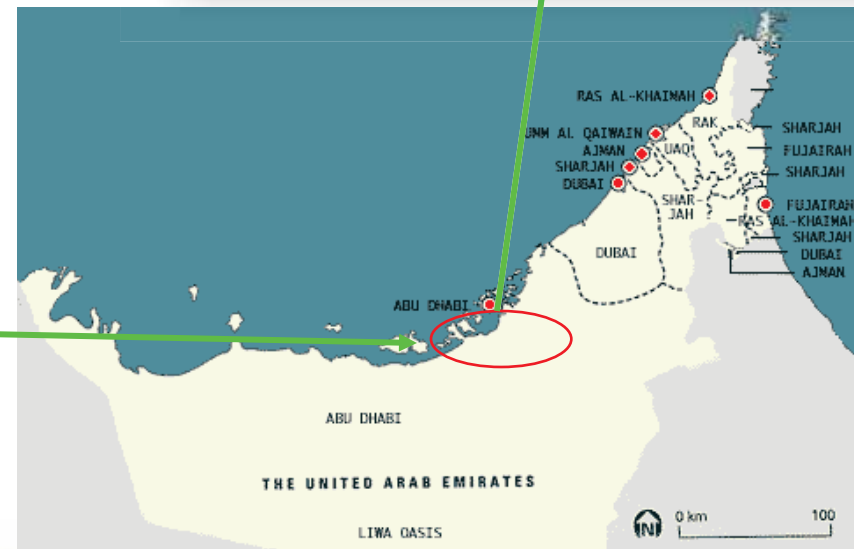
## Project Scope

- Design, project, and construction management
- Public relations and training





# Where is Masdar City?





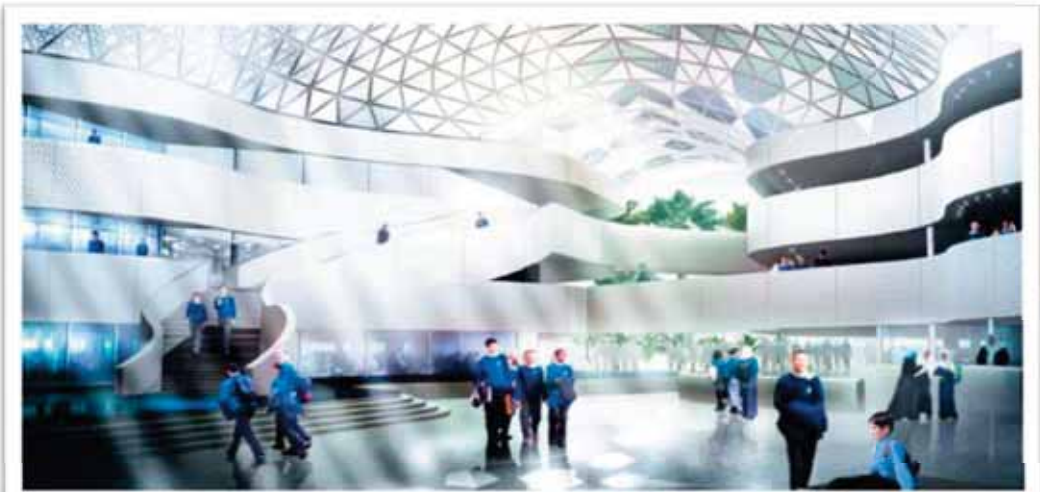


# Masdar City





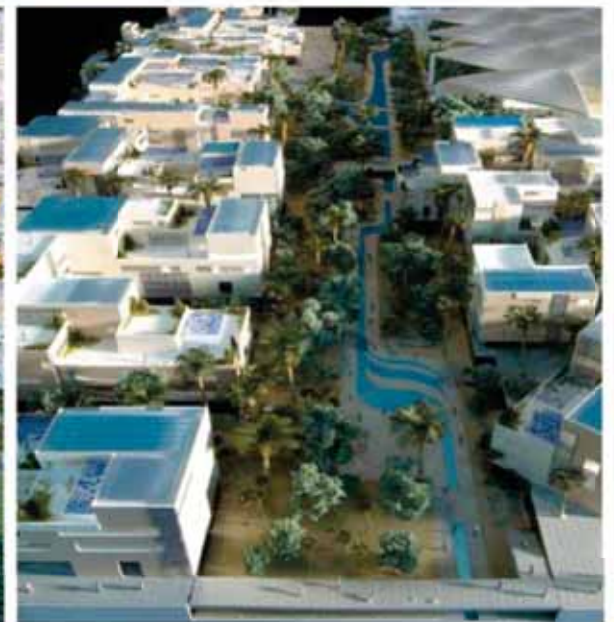
# Masdar City







# Masdar City





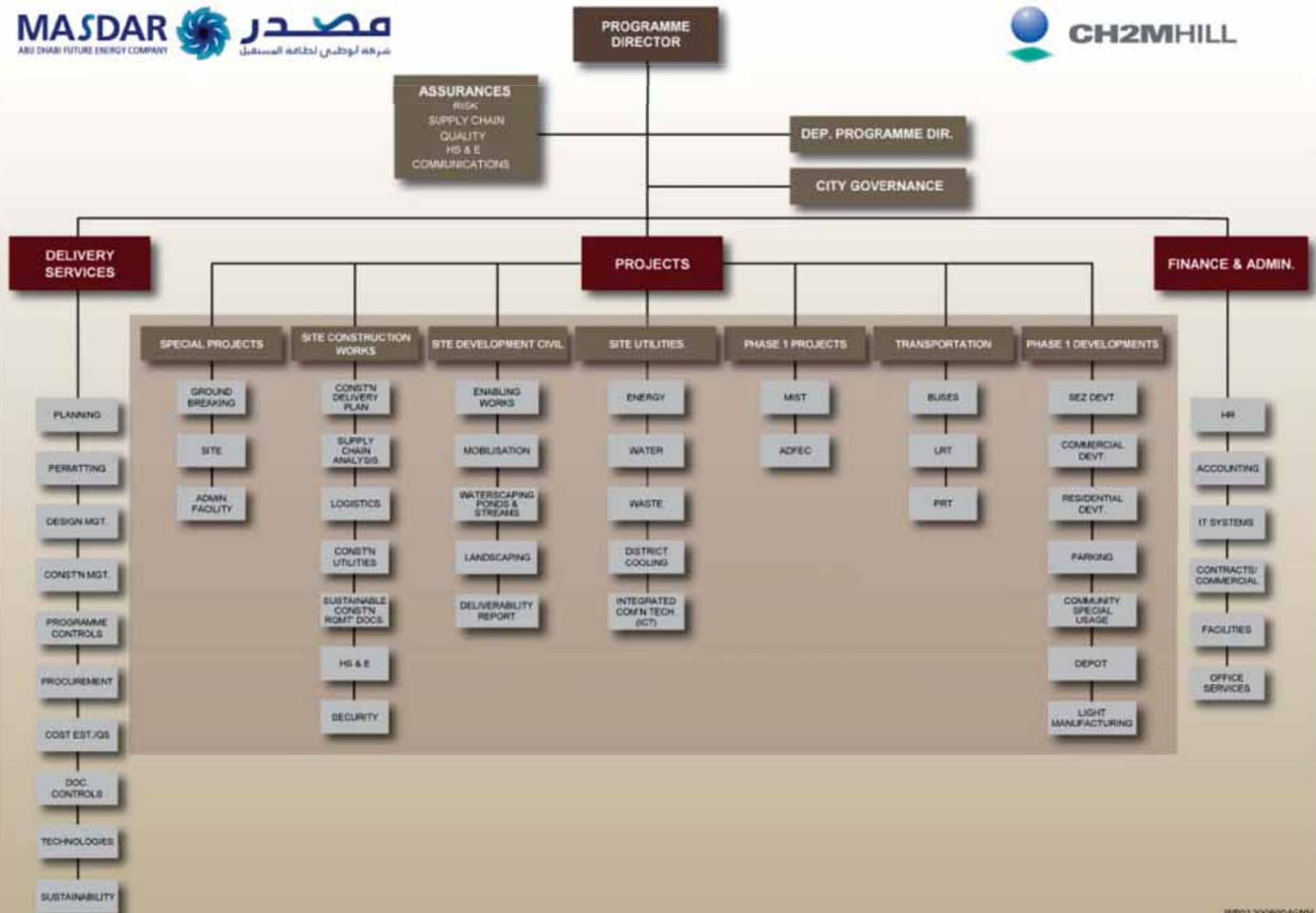


# Masdar City





# PROGRAMME ORGANISATION STRUCTURE





# Deep Tunnel Sewerage System and Changi Water Reclamation Plant

*Client: Singapore Public Utilities Board*

*Location: Republic of Singapore*

## Project Scope

- Complex regulatory and permitting system (British model)
- More than 50 kilometers of 3.5 to 6.0-meter diameter deep tunnels across island
- Decommissioned 6 treatment plants and 139 lift stations
- Packaged construction contracts to maximize supply chain competition





# Port of Los Angeles / Port of Long Beach



Data SIO, NOAA, U.S. Navy, NGA, GEBCO

©2010 Google





# Middle Harbor Redevelopment Project

*Client: Port of Long Beach*

*Location: Long Beach, California*

## Project Scope

- Reconfigure, upgrade, and modernize Piers D, E, and F
- Transform 2 existing terminals into a single modernized terminal with double the capacity



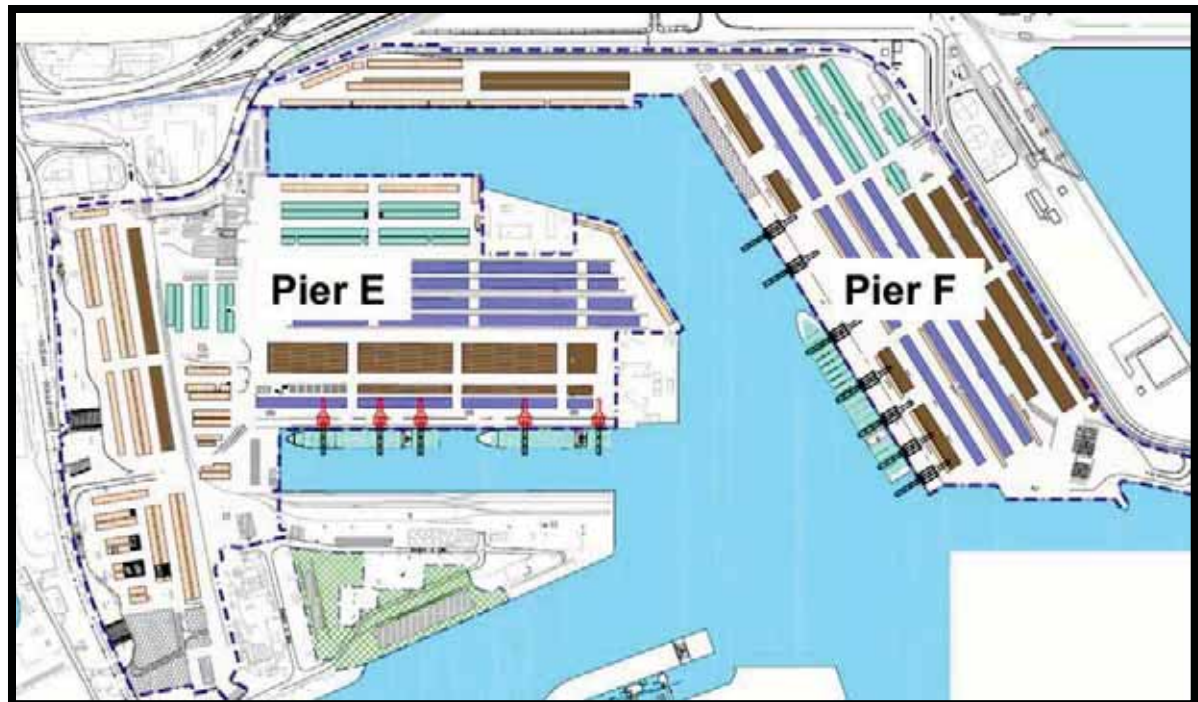




# Middle Harbor Redevelopment Project

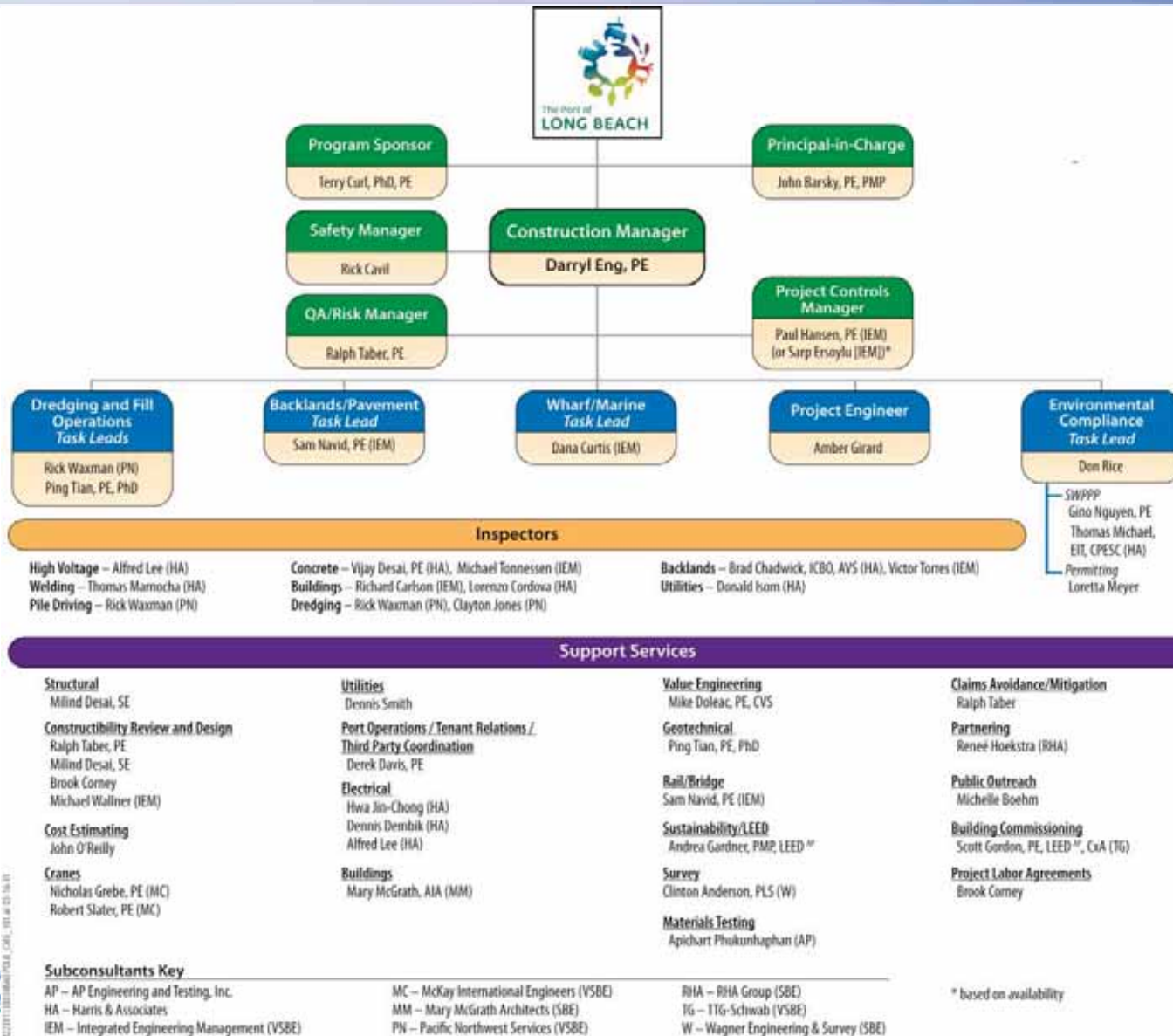
## 10-year Modernization Project

- Aggressive environmental improvement measures
- Clean, alternative-fuel cargo equipment
- Air pollution reduction of 50% or more
- LEED environmental building standards
- Model for green seaport facilities around the world





# Middle Harbor Redevelopment Project





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# **Global Strategic Analysis 2010-2014**

*from “Success to Significant”*





# CH2M HILL Transportation Group's journey... from "Success to Significant"

*Envision our 2014 desired end state...*

Recognized industry  
leader in **ALL**  
transportation modes



- Public Transportation
- Transit and Rail

Our **GLOBAL**  
**BUSINESS** has  
expanded



- Key Programs
- Projects and resources in strategic, high-demand locations

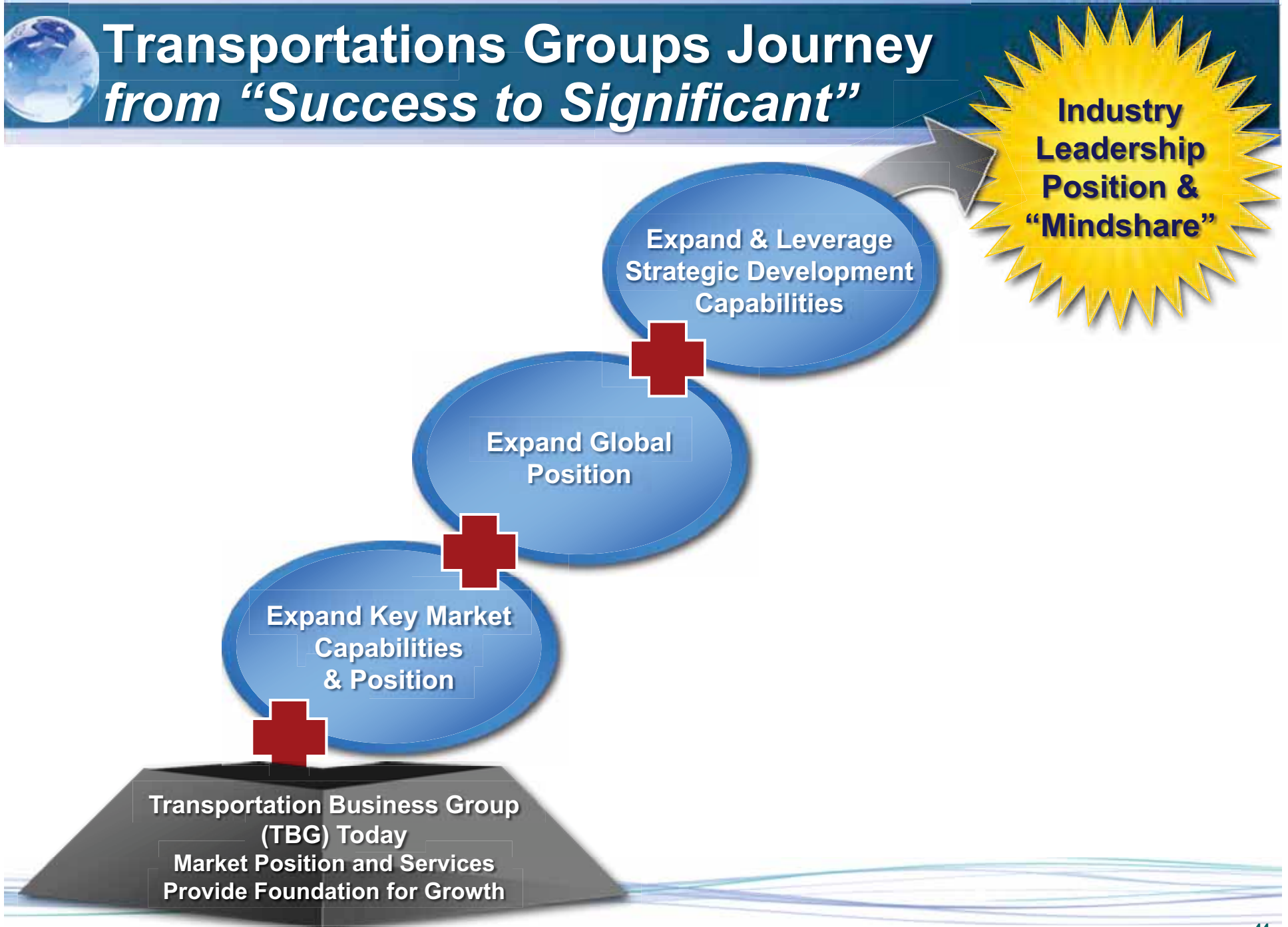
We have industry  
leadership  
**"MINDSHARE"**



- Sustainability
- Employer of Choice
- Full Service
- PM/CM



# Transportations Groups Journey from “Success to Significant”





# Our Journey to Industry Significance

## AGENDA

1

**TBG Today and Existing Market Conditions**

2

**Future Transportation Market Drivers**

3

**Strategic Priorities**

- Expand key market capabilities and position
- Expand our global position
- Expand and leverage our strategic delivery capabilities

4

**Summary and Business Projections**



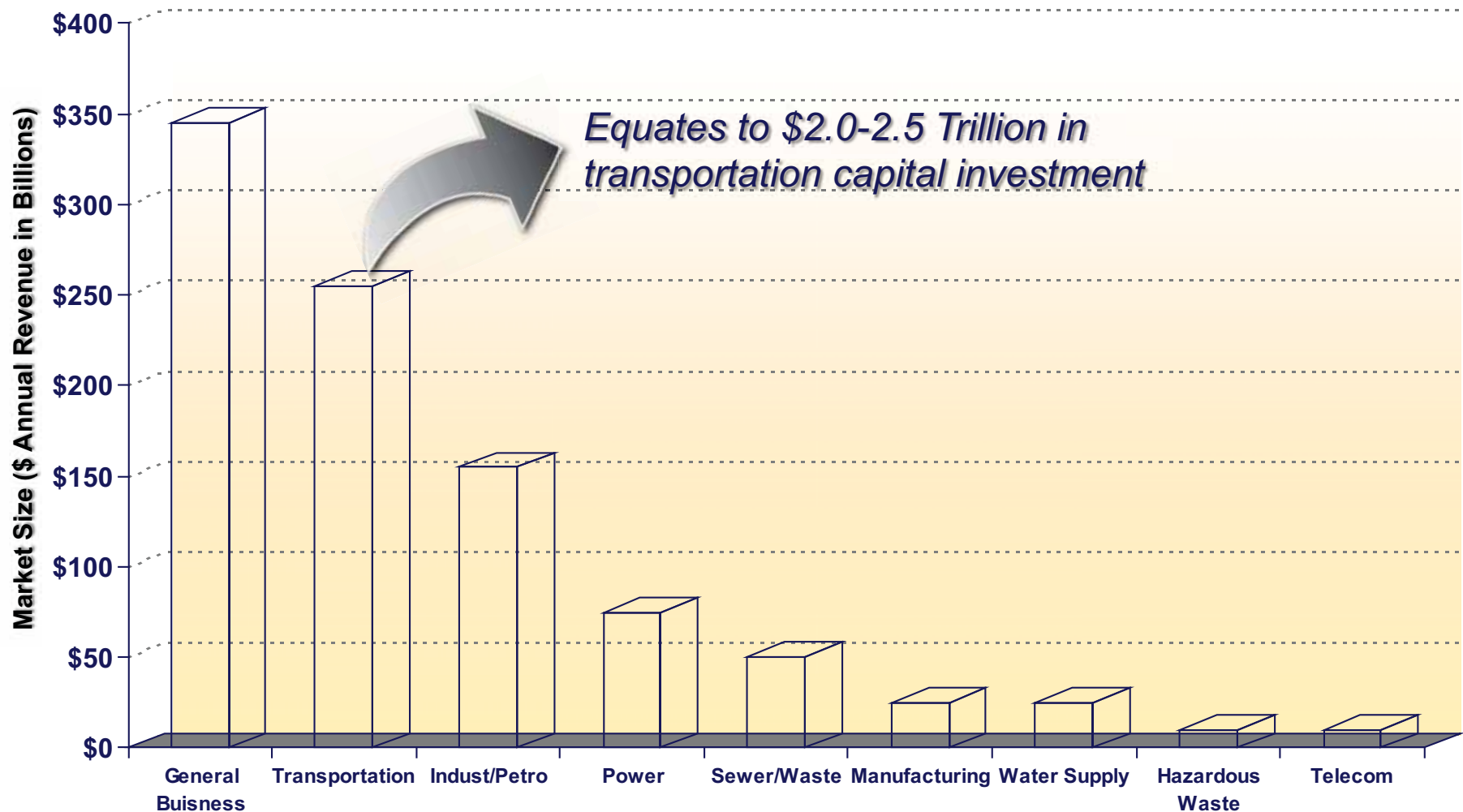
# **TBG Today and Existing Market Conditions**





# Transportation is the Largest Infrastructure Market

2008 ENR Revenue by Market Segment





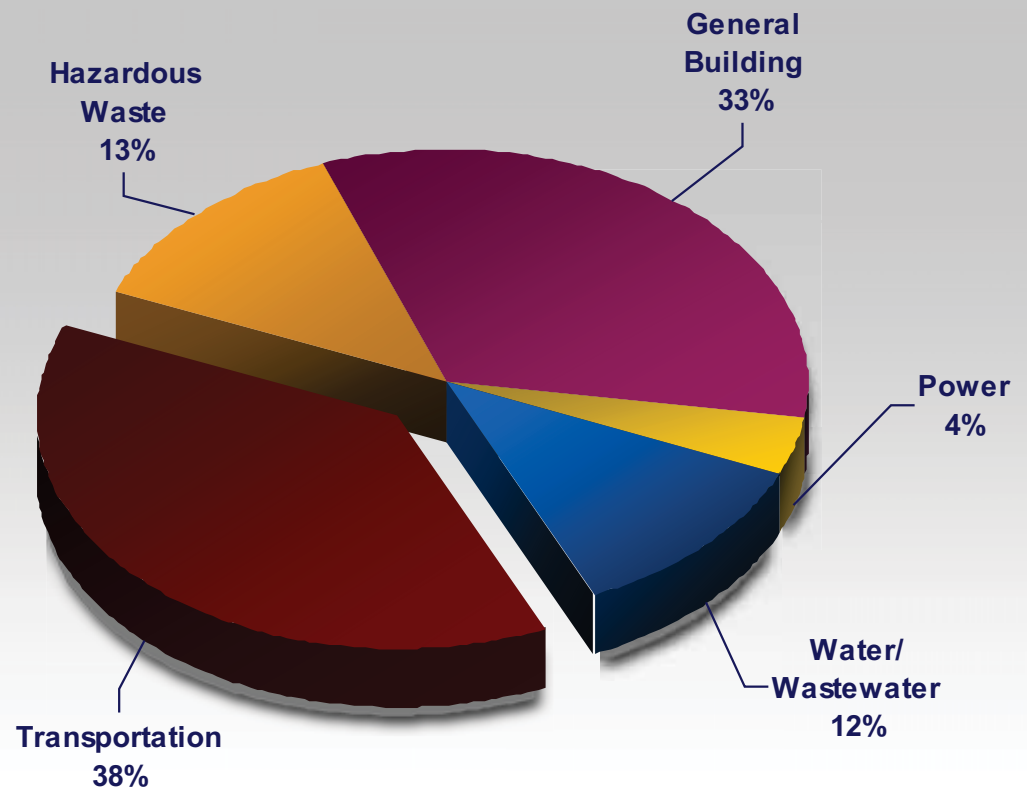
# Acquisition Strategies Have Defined the Competitive Landscape- Larger Firms are Getting Larger

## ENGINEERING NEWS-RECORD RANKINGS

Top 20 in Transportation 1998

- 1 Parsons Brinckerhoff Inc.
- 2 URS Greiner Woodward-Clyde
- 3 The Louis Berger Group
- 4 HNTB Corp.
- ~~5 Daniel, Mann, Johnson, & Mendenhall~~
- ~~6 ICF Kaiser International Inc.~~
- ~~7 Sverdrup Corp.~~
- 8 HDR Inc.
- 8 CH2M HILL
- ~~9 Law Engineering & Environ. Services, Inc.~~
- 10 Michael Baker Corp.
- 11 STV Group
- ~~12 Raytheon Engineers & Constructors Int'l.~~
- ~~13 Morrison Knudsen Corp.~~
- ~~14 Edwards and Kelsey Inc.~~
- ~~15 Carter and Burgess Inc.~~
- ~~16 Rust Environ. & Infrastructure~~
- ~~17 Holmes & Narver~~
- 18 David Evans and Associates Inc.
- ~~19 Rummel, Klepper & Kahl LLP~~
- 20 Camp Dresser & McKee Inc.

*AECOM has acquired 25 firms in the last 10 years—  
transportation has been a market emphasis*





# TBG Achieved a Market Growth and Diversification Mission



	2000	2003	2006	2008
Bridges	#8	#6	#6	#5
Highway	#7	#8	#9	#8
Airports	#11	#8	#6	#5
Transit and Rail	NR	NR	NR	#16
Marine and Port Facilities	#4	#4	#3	#3
<b>Transportation</b>	<b>#8</b>	<b>#7</b>	<b>#7</b>	<b>#7</b>



# Some Significant “Lessons Learned” are Shaping Our Current and Future Business Strategies

We over emphasized growth, underemphasized stronger business performance

In design-build, we ran before we were ready to walk

We took for granted delivery quality would be maintained through our rapid growth and diversification

During tough times we became more organizationally introverted

We stuck too long with some average senior people performance





# **Future Transportation Market Drivers**



# Transportation Infrastructure Will Continue to be the Largest Global Investment



***Global infrastructure investment over 25 years  
is estimated to be \$50 Trillion***



# Aging and Deteriorating Transportation Infrastructure Will Continue to Drive Global Spending

*More than 26%, or one in four, of the U.S.' bridges are either structurally deficient or functionally obsolete.*



I-35 Bridge, Minnesota

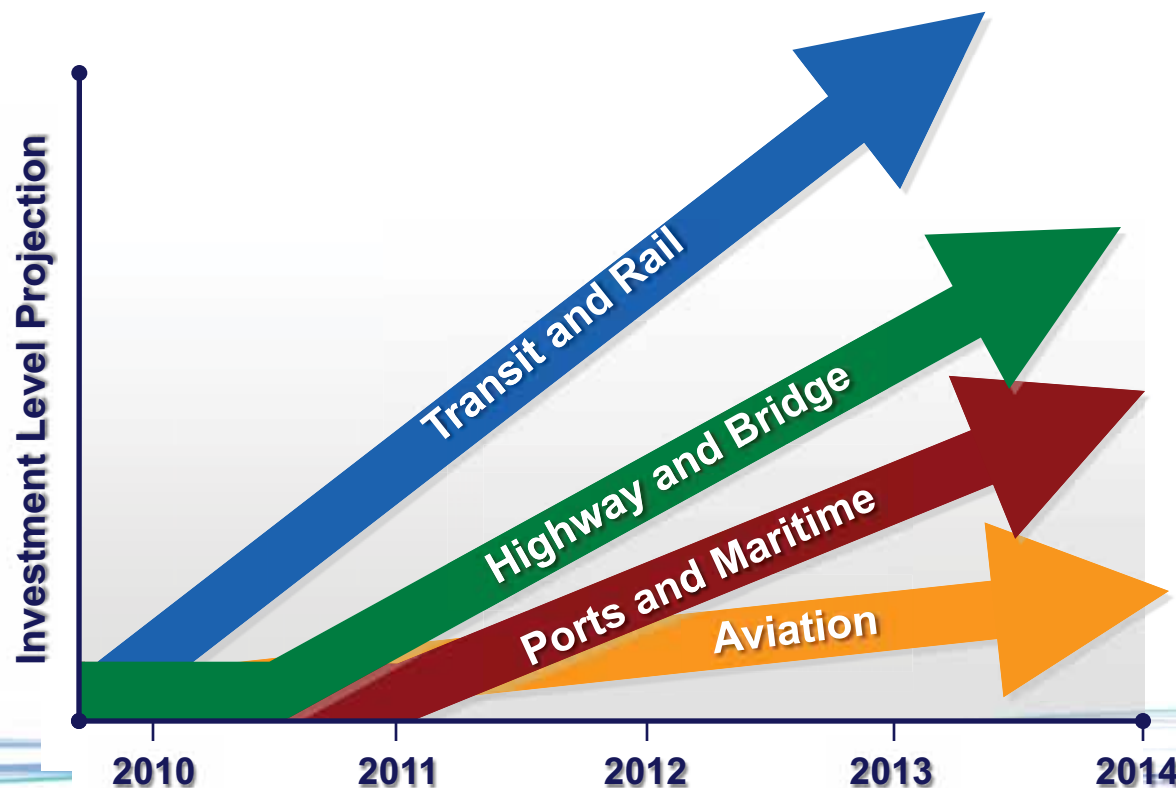
## American Society of Civil Engineers 2009 Infrastructure Report Card

<b>Aviation</b>	<b>D</b>
<b>Bridges</b>	<b>C</b>
Dams	D
Drinking Water	D-
Energy	D+
Inland Waterways	D-
Levees	D-
<b>Rail</b>	<b>C-</b>
<b>Roads</b>	<b>D-</b>
<b>Transit</b>	<b>D</b>
Wastewater	D-



# Transportation Modes Will Also Shift in the Future

- Significant increased investment in Transit and Rail
- Moderate increased investment in Ports/Maritime and Highway/Bridge
- Level investment in Aviation







## **Key Strategies: Expand Key Market Capabilities and Position**





# Our Current Transit and Rail Market Position Demands a Rapid Transformation to Achieve 2014 Leadership Position

(Top 5 in Rail Segment)

## TOP 20 in Mass Transit and Rail *ENR, June 23, 2008*

- 
- #1 AECOM Technology Corp.
  - #2 Parsons Brinckerhoff Inc.
  - #3 URS Corp.
  - #4 Parsons
  - #5 Jacobs
  - #6 STV Group Inc.
  - #7 Bechtel
  - #8 Louis Berger Group
  - #9 AECOM Technology Corp.
  - #10 HNTB Cos.
  - #11 Earth Tech Inc.
  - #12 Gannett Fleming
  - #13 CDI Engineering Solutions
  - #14 PBS&J
  - #15 Fluor Corp.
  - #16 CH2M HILL
  - #17 Skanska USA Inc.
  - #18 Wilson & Co., Engineers and Architects
  - #19 David Evans and Associates Inc.
  - #20 Hatch Mott MacDonald

### Three key strategies exist:

1. Accelerated organic growth
2. Acquire niche players, coupled with accelerated organic growth
3. Acquire a major transit and rail company



## **Key Strategies: Expand Global Position**







# Today, TBG Has Some ICON International Projects but Limited Footprint

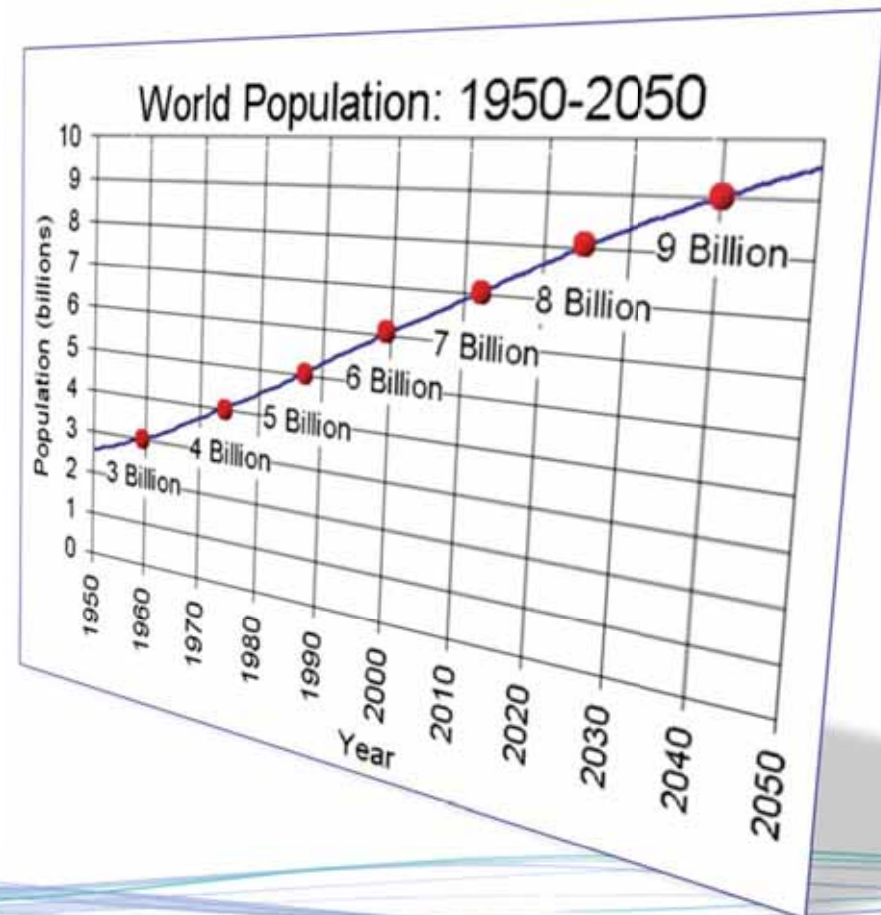


**93 TBG staff outside North America**



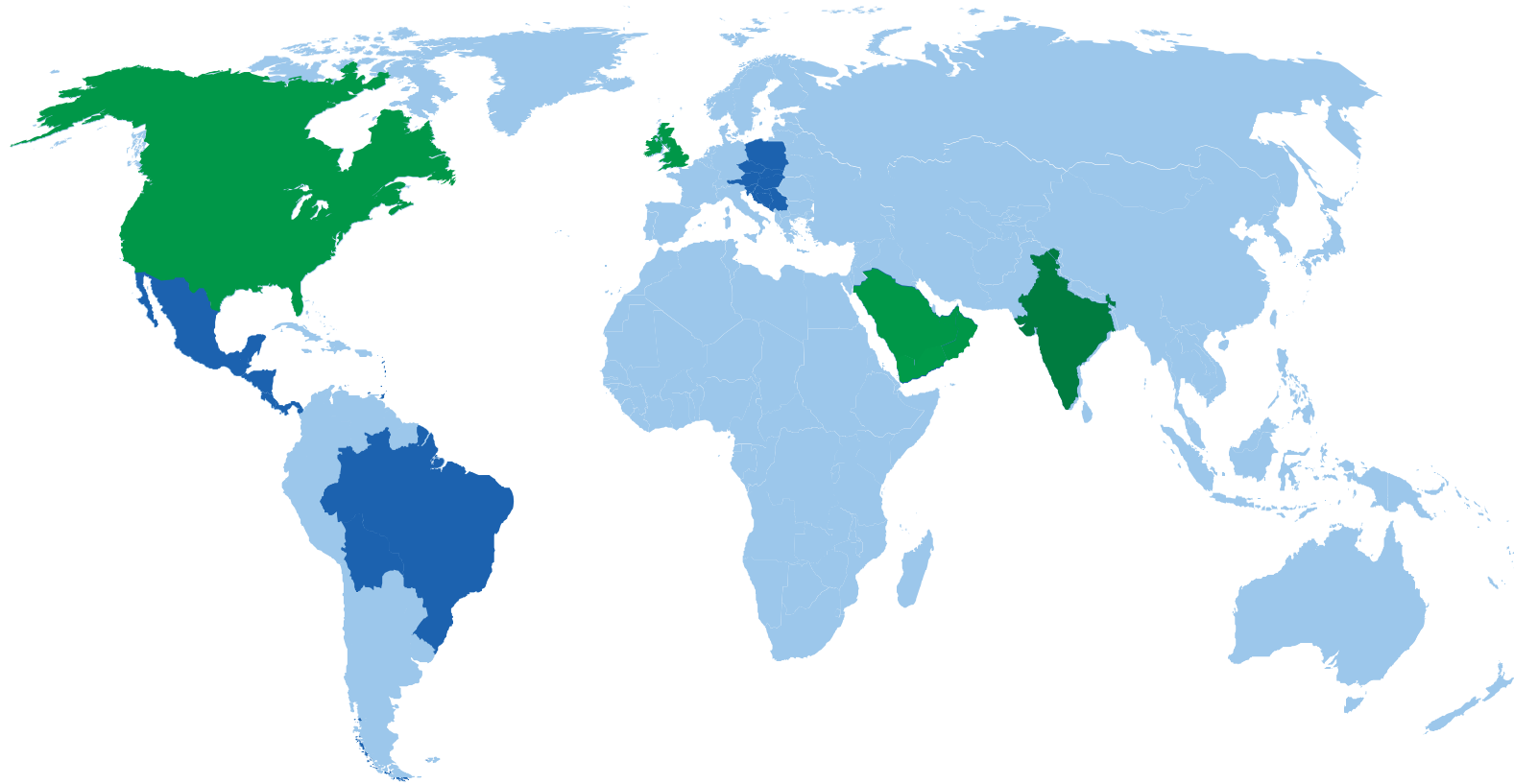
# Our Global Strategy Will Thoughtfully Raise Our Industry Profile and Portfolio

- **First and foremost:** Outstanding delivery on existing projects
- **Second:** Expand our portfolio of major global projects
  - New major programs
  - Follow strategic clients
- **Third:** selectively build local capacity and capability for sustainable business





# Expanding Our Global Footprint Will Focus on Very Select Geographies

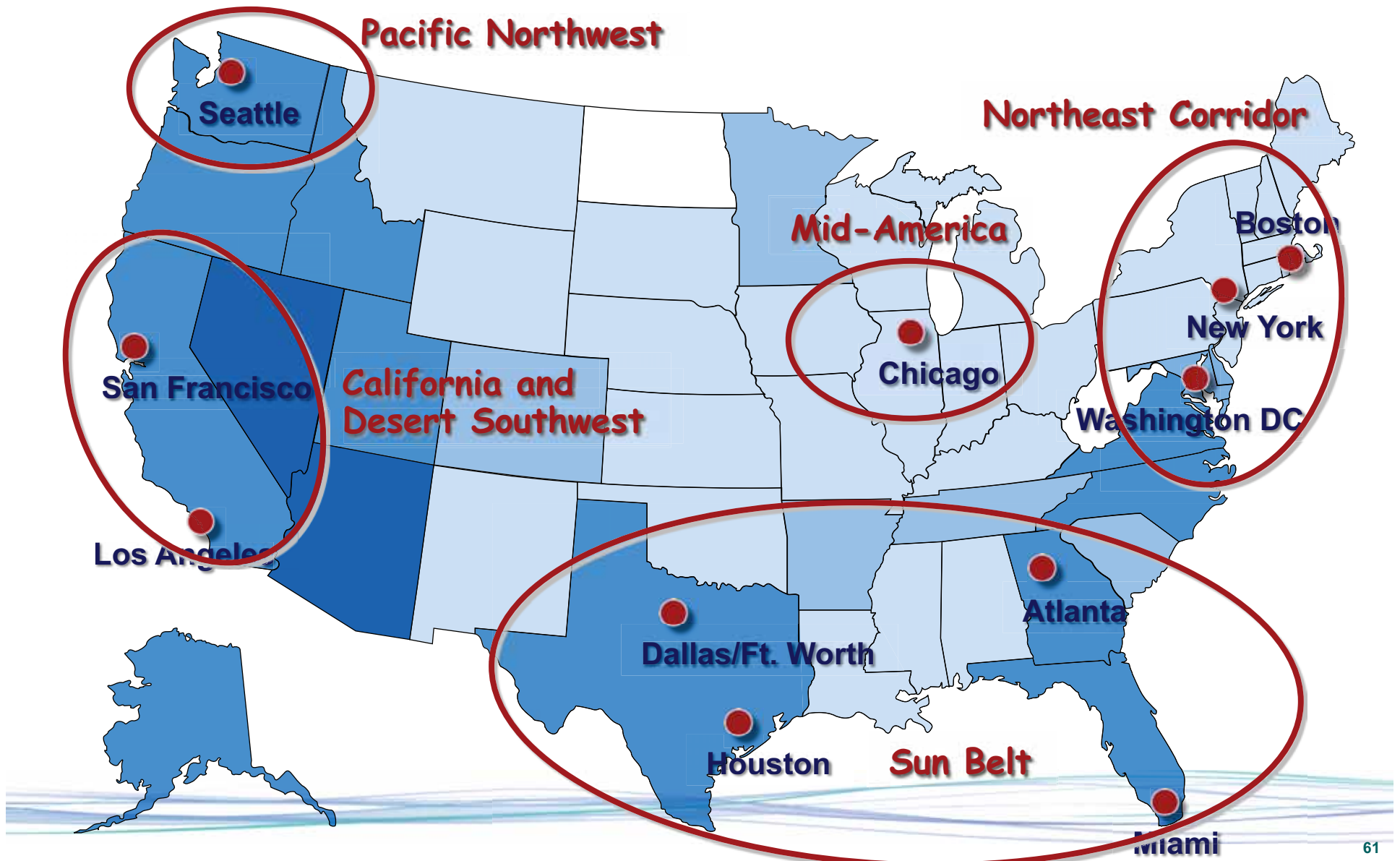


- Major program & focus on broader geographies
- Build local resources in select geographies





# Continued United States Market Growth Will Focus on the Domestic “Megaregions”





## **Key Strategies: Expand and Leverage Strategic Development Capabilities**





# The Ability to Provide Full Transportation Project Delivery Service is Critical to be a Market Leader

Policy  
Mission

Programming  
CIP Development

Funding

Planning

Environmental

Preliminary  
Engineering

Final Design | Construction

O&M





# Expanding Our Unique Project Design and Construction Capabilities Will Enable Growth and Strategic Positioning

Policy  
Mission

Programming  
CIP Development

Funding

Planning

Environmental

Preliminary  
Engineering

Final Design | Construction

O&M

**CH2M HILL is the only U.S.  
firm engaged in project  
Design + Construction + Operation**



# **Summary and Business Projections**



# “Sustainability” Services and Solutions Will Evolve and We Must be a Market Leader







**Being the best at what we deliver and how we deliver it will elevate us to industry leading “Mindshare”**

**Offer the most complete service offering from concept to operations**

**Bring the best people in the industry**

**Provide the most enjoyable and satisfying customer experience**

**Deliver the most efficient, effective and sustainable solutions**

**A leader in capability and capacity**

**A leader in client's minds**



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# **Experts and Leaders in Engineering & Construction**





# The Top Design Firms

## POWER

Revenue: \$6.1 Billion  
Top 20 Market Share: 79.49%

RANK		
2011	2010	
1	3	BLACK & VEATCH
2	5	SARGENT & LUNDY LLC
3	2	BECHTEL
4	6	AECOM TECHNOLOGY CORP.
5	1	THE SHAW GROUP INC.
6	8	BURNS & MCDONNELL
7	9	FLUOR CORP.
8	12	AMEC
9	7	CH2M HILL
10	10	TETRA TECH INC.
11	**	JACOBS
12	4	URS CORP.
13	13	PARSONS BRINCKERHOFF INC.
14	17	KIEWIT CORP.
15	15	WORLEYPARSONS GROUP INC.
16	11	ZACHRY HOLDINGS
17	16	POWER ENGINEERS INC.
18	18	HDR
19	19	ENERCON SERVICES INC.
20	**	KBR

## TRANSPORTATION

Revenue: \$10.6 Billion  
Top 20 Market Share: 64.27%

RANK		
2011	2010	
1	1	AECOM TECHNOLOGY CORP.
2	2	URS CORP.
3	3	PARSONS BRINCKERHOFF INC.
4	6	HNTB COS.
5	4	LOUIS BERGER GROUP
6	5	JACOBS
7	7	CH2M HILL
8	8	HDR
9	9	PARSONS
10	10	STV GROUP INC.
11	14	MICHAEL BAKER CORP.
12	11	ATKINS NORTH AMERICA
13	13	TRANSYSTEMS CORP.
14	12	KIMLEY-HORN AND ASSOCIATES INC.
15	**	KBR
16	17	T.Y. LIN INTERNATIONAL
17	18	HATCH MOTT MACDONALD
18	15	WILBUR SMITH ASSOCIATES INC.
19	16	GANNETT FLEMING
20	20	BECHTEL

## WATER

Revenue: \$3.9 Billion  
Top 20 Market Share: 72.28%

RANK		
2011	2010	
1	1	TETRA TECH INC.
2	4	CH2M HILL
3	2	MWH GLOBAL
4	3	AECOM TECHNOLOGY CORP.
5	5	URS CORP.
6	7	HDR
7	6	BLACK & VEATCH
8	8	CDM
9	16	ARCADIS/MALCOLM PIRNIE/RTKL
10	10	LOUIS BERGER GROUP
11	**	PARSONS BRINCKERHOFF INC.
12	11	JACOBS
13	**	AMEC
14	12	STANTEC INC.
15	13	MICHAEL BAKER CORP.
16	**	KBR
17	15	CAROLLO ENGINEERS INC.
18	9	PARSONS
19	19	BROWN AND CALDWELL
20	**	HAZEN AND SAWYER PC



# Top Firms by Market and Region

## THE TOP 225 INTERNATIONAL CONTRACTORS

### TOP 10 BY MARKET

#### BUILDING

TOP 10 WITH REVENUE OF \$46.4 BIL. OF \$86.0 BIL. TOTAL

1	HOCHTIEF AG
2	SKANSKA AB
3	BOVIS LEND LEASE
4	STRABAG SE
5	BALFOUR BEATTY PLC
6	BOUYGUES
7	CHINA STATE CONSTRUCTION ENG'G CORP.
8	ROYAL BAM GROUP NV
9	VINCI
10	FCC, FOMENTO DE CONSTR. Y CONTRATAS SA

#### POWER

TOP 10 WITH REVENUE OF \$14.7 BIL. OF \$35.7 BIL. TOTAL

1	CHINA NATIONAL MACHINERY INDUSTRY CORP.
2	HYUNDAI ENGINEERING & CONSTRUCTION CO. LTD.
3	ABEINSA SA
4	IBERDROLA INGENIERIA Y CONSTRUCCION
5	GRUPO ACS
6	SHANGHAI ELECTRIC GROUP CO. LTD.
7	GRUPO ISOLUX CORSAN SA
8	SEPCOIII ELECTRIC POWER CONSTRUCTION CORP.
9	SINOHYDRO CORP.
10	MAIRE TECNIMONT SPA

#### TRANSPORTATION

TOP 10 WITH REVENUE OF \$59.4 BIL. OF \$112.3 BIL. TOTAL

1	VINCI
2	STRABAG SE
3	BOUYGUES
4	CHINA COMMUNICATIONS CONSTRUCTION GRP. (LTD.)
5	HOCHTIEF AG
6	BECHTEL
7	FCC, FOMENTO DE CONSTR. Y CONTRATAS SA
8	BILFINGER BERGER AG
9	SKANSKA AB
10	ROYAL BAM GROUP NV

#### WATER

TOP 10 WITH REVENUE OF \$8.5 BIL. OF \$11.2 BIL. TOTAL

1	HOCHTIEF AG
2	IMPREGILO SPA
3	SALINI COSTRUTTORI SPA
4	CONSTRUTORA NORBERTO ODEBRECHT
5	CONSOLIDATED CONTRACTORS GROUP
6	STRABAG SE
7	VINCI
8	SNC-LAVALIN INTERNATIONAL INC.
9	SKANSKA AB
10	CHINA GEO-ENGINEERING CORP

### WHO IS WORKING IN WHICH REGION

#### MIDDLE EAST

TOTAL REVENUE: \$77.6 BIL., UP 0.1%

FIRMS	COUNTRY	% OF TOTAL	\$ MILLION
16	U.S.	18.6	14,407.7
11	SOUTH KOREA	12.3	9,530.9
35	CHINA	10.8	8,386.9
16	ITALY	7.8	6,025.1
2	GREECE	7.3	5,682.1
77	OTHER	43.2	33,514.3

#### ASIA

TOTAL REVENUE: \$73.2 BIL., UP 6.8%

FIRMS	COUNTRY	% OF TOTAL	\$ MILLION
46	CHINA	24.9	18,210.6
4	GERMANY	23.7	17,379.7
17	U.S.	13.0	9,547.1
13	JAPAN	9.5	6,938.2
11	SOUTH KOREA	5.4	3,929.4
58	OTHER	23.5	17,180.1

#### AFRICA

TOTAL REVENUE: \$56.8 BIL., UP 31.2%

FIRMS	COUNTRY	% OF TOTAL	\$ MILLION
47	CHINA	36.6	20,799.1
19	ITALY	15.5	8,830.5
5	FRANCE	10.0	5,663.3
9	U.S.A.	7.6	4,307.4
25	TURKEY	4.9	2,763.5
55	OTHER	25.4	14,447.8

#### LATIN AMERICA/CARIBBEAN

TOTAL REVENUE: \$27.1 BIL., UP 13.7%

FIRMS	COUNTRY	% OF TOTAL	\$ MILLION
11	SPAIN	23.0	6,246.5
12	ITALY	21.6	5,855.7

1	BRAZIL	14.0	3,804.0
8	U.S.	12.0	3,254.7
3	FRANCE	6.8	1,840.6
52	OTHER	22.5	6,110.9

#### EUROPE

TOTAL REVENUE: \$100.8 BIL., DOWN 11.7%

FIRMS	COUNTRY	% OF TOTAL	\$ MILLION
4	FRANCE	23.3	23,457.0
2	AUSTRIA	16.2	16,324.8
11	SPAIN	14.2	14,312.8
16	U.S.	7.8	7,829.3
1	SWEDEN	6.8	6,816.0
101	OTHER	31.8	32,066.8

#### U.S.

TOTAL REVENUE: \$34.9 BIL., DOWN 16.5%

FIRMS	COUNTRY	% OF TOTAL	\$ MILLION
3	GERMANY	24.3	8,492.6
1	SWEDEN	15.3	5,332.1
2	AUSTRALIA	12.7	4,436.3
2	U.K.	12.5	4,368.0
3	FRANCE	10.2	3,557.8
46	OTHER	24.9	8,691.3

#### CANADA

TOTAL REVENUE: \$13.4 BIL., DOWN 0.1%

FIRMS	COUNTRY	% OF TOTAL	\$ MILLION
15	U.S.A.	77.6	10,386.7
3	FRANCE	12.8	1,717.3
3	GERMANY	4.2	558.2
4	ITALY	1.6	213.4
1	AUSTRIA	1.0	137.9
33	OTHER	2.8	369.9



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- CH2M HILL Overview
- Construction & Engineering Trends
- Major Projects
- Global Strategic Analysis – from “Success to Significant”
  - Existing Market Conditions
  - Market Drivers
  - Strategic Priorities
  - Business Projection
- Experts and Leaders in Engineering & Construction
- **Global Penetration Requirements**
- Leadership and Management in Engineering & Construction
- Curl’s Top 14
- Summary





# **Global Penetration Requirements**





# Global Penetration Requirements

- Innovating Business Model
- Develop Strategic Business Plan
- Focus on Target Country – 1-2 years
  - Establish Office – Right Staff
  - Develop Relationships – Clients / Partners
- Focus on Top 5 Projects
- Tactical Project Action Plans
- Execute TAC Project Action Plan – Refine as Needed

***Success Requires Patience + Sr. Leaders Support***



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# **Leadership and Management in Engineering & Construction**





# Leadership and Management

## LEADERSHIP

People  
Spontaneity, serendipity  
Release, empowerment  
Effectiveness  
Programmer  
Investment  
Principles  
Transformation  
Principle-centered power  
Discernment  
Doing the right things  
Direction  
Top line  
Purposes  
Principles  
On the systems  
“Is the ladder against the right wall”



## MANAGEMENT

Things  
Structure  
Control  
Efficiency  
Program  
Expense  
Techniques  
Transaction  
Utility  
Measurement  
Doing things right  
Speed  
Bottom line  
Methods  
Practices  
In the systems  
Climbing the ladder first

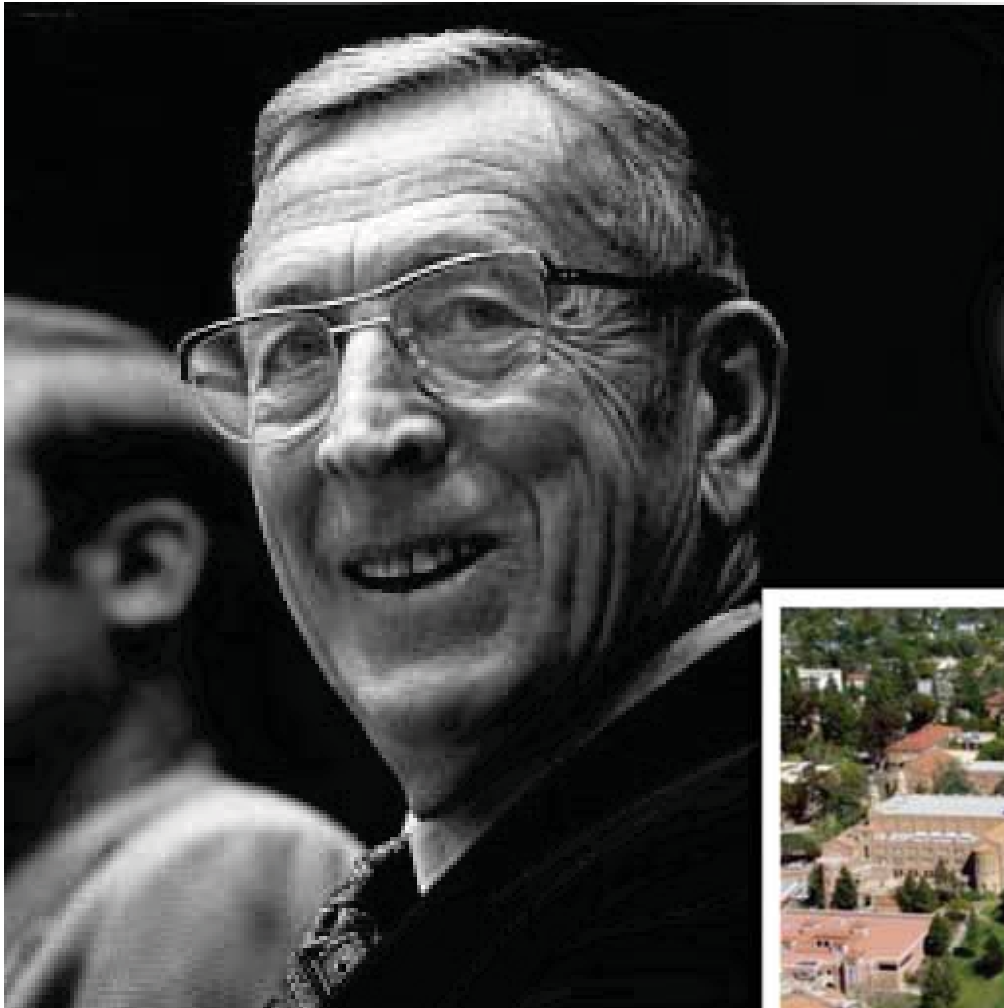


# Definitions of Leadership and Management

- **Leadership: Broad Concept.** Focus on strategy, policy. Doing the right things. Effectiveness. Development of Organizational goals. People are key.
- **Management:** Achieving organizational goals. Doing things right based upon direction from leaders. Efficiency.



# Basketball Dynasty





# Success

**Success is peace of mind which is a direct result of self-satisfaction in knowing you made the effort to become the best you are capable of becoming.**

Source: *The Essential Wooden*







# Leader/Management Level vs. Skill Level

LEADERSHIP/ MANAGEMENT LEVEL	SKILL LEVEL		
	TECHNICAL	INTERPERSONAL/ RELATIONSHIP	HIGH LEVEL STRATEGIC/POLICY
SENIOR MANAGER (SENIOR VICE PRESIDENT – HIGHER )	N/A M/H	H M/L	H H
DIVISION CHIEF (VICE PRESIDENT)	M/L M/H	H M/L	H L
SUPERVISOR (GENERAL MANAGER)	H/M H/H	M L	L N/A
ENGINEER	H H/H	M L	N/A N/A

H/H = Actual



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## **Curl's Top 14**



# Curl's Top 14

- Family first
- Know and be yourself
- Take care of your people
- Remain calm
- Listen and observe
- Be positive
- Have balance in your life
- Learn to delegate
- Communicate, communicate, communicate
- Be nice
- Think big
- Team competence
- Enjoy and have fun
- Understand business perspective, not just technical side





# Summary

**“Make it Happen”**

**“Some of us are not as good as  
all of us working together”**



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# Summary



# Summary

- 1.** Transportation will continue to be the largest public infrastructure investment in the world
- 2.** M&A will continue to bifurcate the transportation consultant industry
- 3.** Opportunities currently exist for niche and major acquisitions
- 4.** Expanding our market position will provide a solid, stable return for our shareholders
- 5.** The strength of our people, and the culture of our firm must remain—it still differentiates us in the marketplace





## **Discussions and Q&A**