

Agenda

Jasper Ocean Terminal



- History of the Jasper Ocean Terminal
- Program Management Overview
- Ocean Shipping 101
- Program Management Services
- JOT Development Schedule

History of Jasper Ocean Terminal

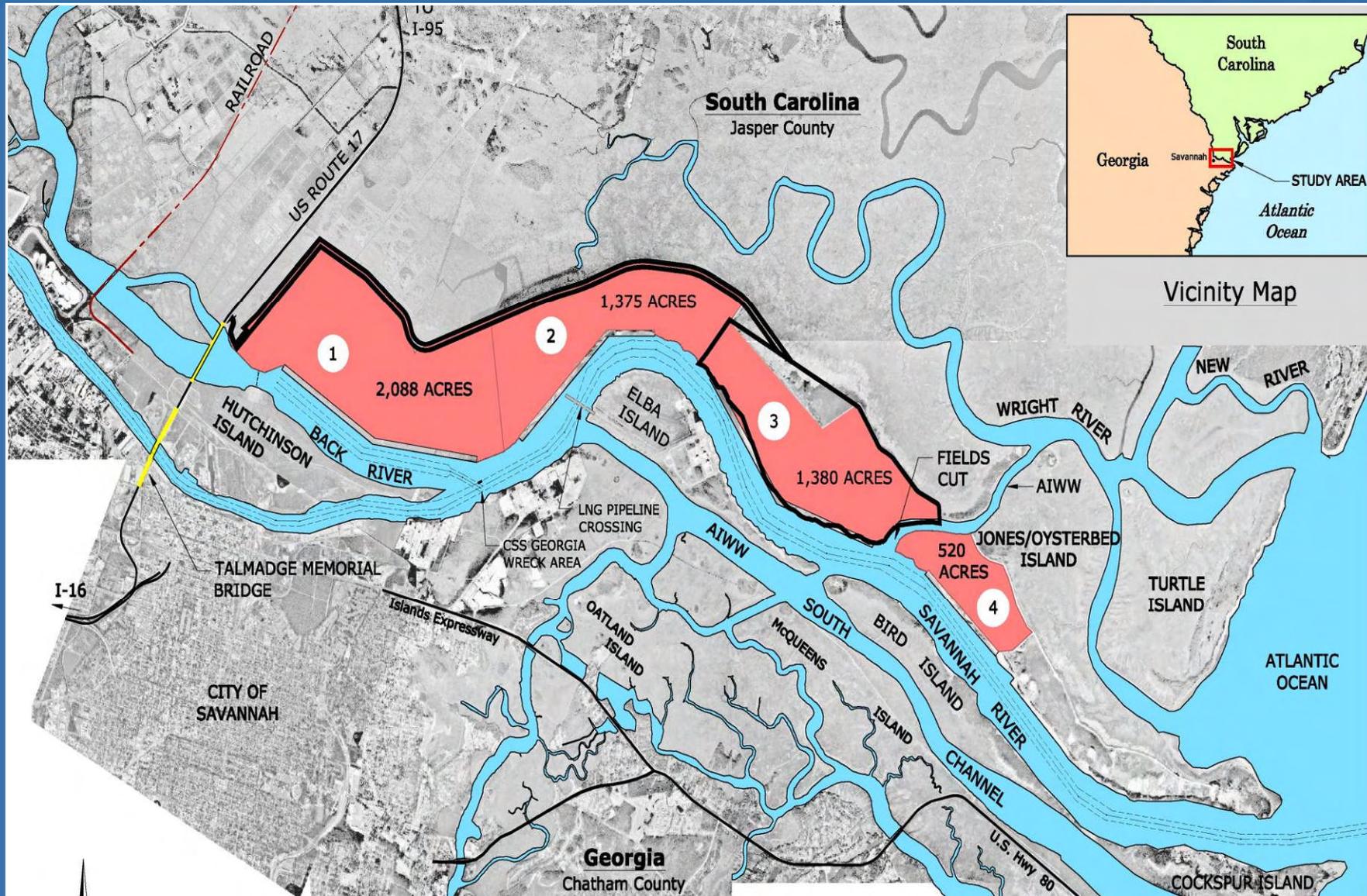
Jasper Ocean Terminal



- Term Sheet (March 2007)
 - Georgia & South Carolina developed jointly
 - Objective is for both states to work cooperatively towards development of a compact to build a new marine container terminal
 - Established a Bi-State Port Task Force
- Prelim. Siting Alternatives Study (July 2007)
 - Moffatt & Nichol engaged by Bi-State Task Force to provide a high-level analysis of sites in Jasper County along Savannah River
 - Sites limited from Talmadge Bridge to Jones Island
 - Evaluated various aspects of potential terminal at different sites

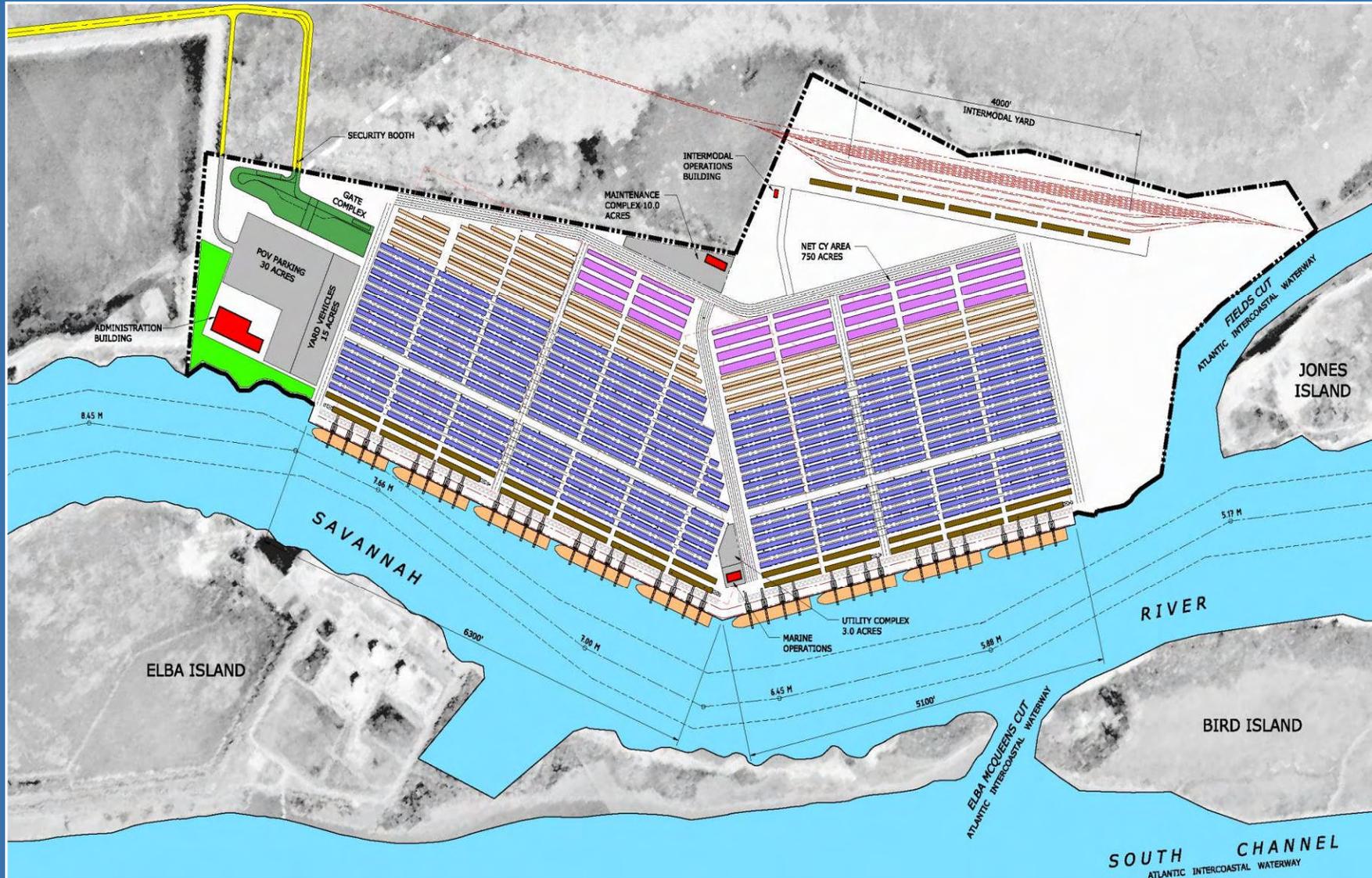
History of Jasper Ocean Terminal

Jasper Ocean Terminal



History of Jasper Ocean Terminal

Jasper Ocean Terminal



Savannah River Maritime Commission Meeting

History of Jasper Ocean Terminal

Jasper Ocean Terminal



- Intergovernmental Agreement (January 2008)
 - Provides framework for both states to work cooperatively towards the development of a new marine container terminal
 - Establishes Jasper Ocean Terminal Joint Project Office to oversee the conduct of studies and tasks needed to determine the feasibility of and to author a development plan
 - Agreement provides distinct tasks and milestones for JPO to accomplish within 24 months
 - JPO's work will eventually result in a detailed proposal for consideration by both states and the U.S. Congress
- Property Acquisition (July 2008)
 - Per Agreement JPO purchases 1,518-acres from GDOT in anticipation of terminal development
 - Tracts 14A & 14B considered most likely location
 - Further engineering and scientific studies needed moving forward

History of Jasper Ocean Terminal

Jasper Ocean Terminal



Commission Meeting

History of Jasper Ocean Terminal

Jasper Ocean Terminal



- Program Management RFQ (August 2008)
 - JPO decides to engage full-service, multi-disciplined consulting firm to provide Program Management services in support of the development of the JOT
 - JPO transmits RFQ to six (6) qualified firms for Program Management services; two (2) firms respond.
- Program Manager(October 2008)
 - Selects M&N as Program Manager
 - M&N to advise Joint Project Office (JPO)
 - M&N to spearhead activities for development

History of Jasper Ocean Terminal

Jasper Ocean Terminal



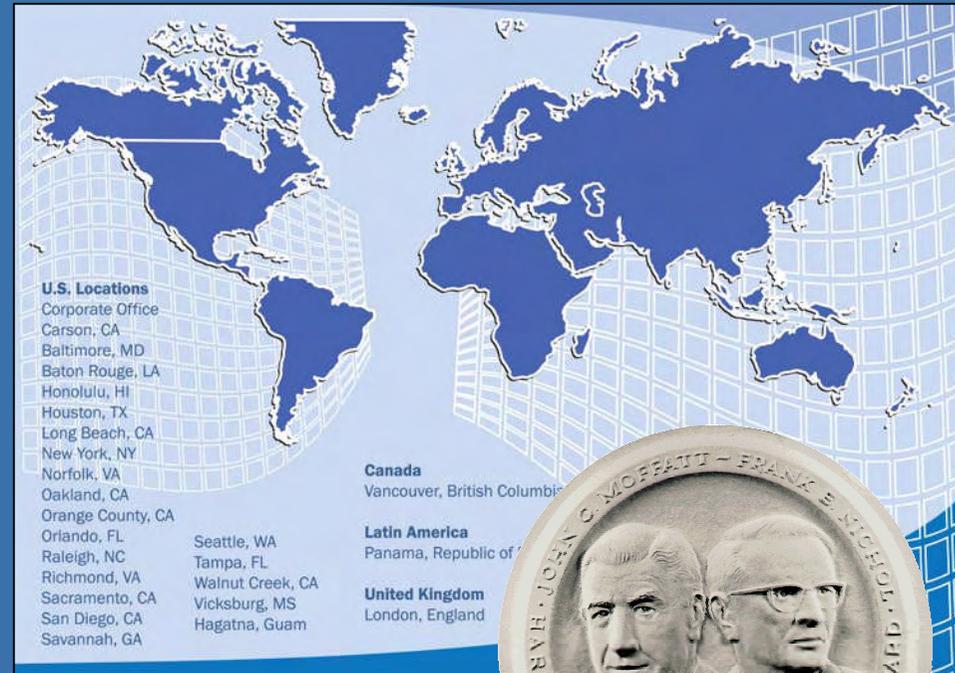
- First Amendment to Intergovernmental Agreement (June 2009)

- Clarifies and expands various provisions based on new information
- Establishes Milestone dates to guide the planning and permitting process
- Provides remedies if Milestones are not met
- Sets an accelerated timeline from July to November, 2009 for drafting the Interstate Compact and associated legislation
- Sets January, 2010 as the date to commence the legislative process to approve the Interstate Compact in both States

Moffatt & Nichol- A Port-Focused Firm



- Founded in 1945
- Ports & Harbors focused firm
- 500+ employees
- Private and public sector clients
- 6000+ projects worldwide
- 26 offices in the U.S., Europe, Latin America and the Pacific Rim
- Full Service Office in Savannah, GA



U.S. Locations

Corporate Office
Carson, CA
Baltimore, MD
Baton Rouge, LA
Honolulu, HI
Houston, TX
Long Beach, CA
New York, NY
Norfolk, VA
Oakland, CA
Orange County, CA
Orlando, FL
Raleigh, NC
Richmond, VA
Sacramento, CA
San Diego, CA
Savannah, GA

Canada

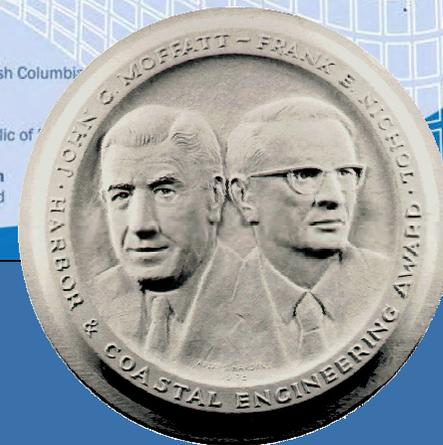
Vancouver, British Columbia

Latin America

Panama, Republic of Panama

United Kingdom

London, England



Program Management Overview

Jasper Ocean Terminal



- Moffatt & Nichol
 - Dial-Cordy & Associates (Environmental Support)
 - Kimley-Horn & Associates, Inc. (Transportation)
 - Hussey, Gay, Bell & DeYoung, Inc. (Surveying & Utilities)
 - S&ME, Inc. (Geotechnical & Environmental Support)
- Well Qualified Georgia & South Carolina Firms



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Program Management Overview



- M&N serving as Program Manager
 - Advising Joint Project Office (JPO)
 - Spearheading activities for development
- Program Management Contract
 - Initial one year duration
 - Option years available
 - First year budget \$3.7M
 - M&N precluded from future design services
 - Subconsultants involved with planning not precluded

Ocean Shipping 101



- Floatation is, always & forever, the best way to move stuff on this planet
- Ships have never stopped growing & changing



- We will continue to build better ships
- If bigger is better, then ships will grow
- Ports & terminals will adapt to serve them

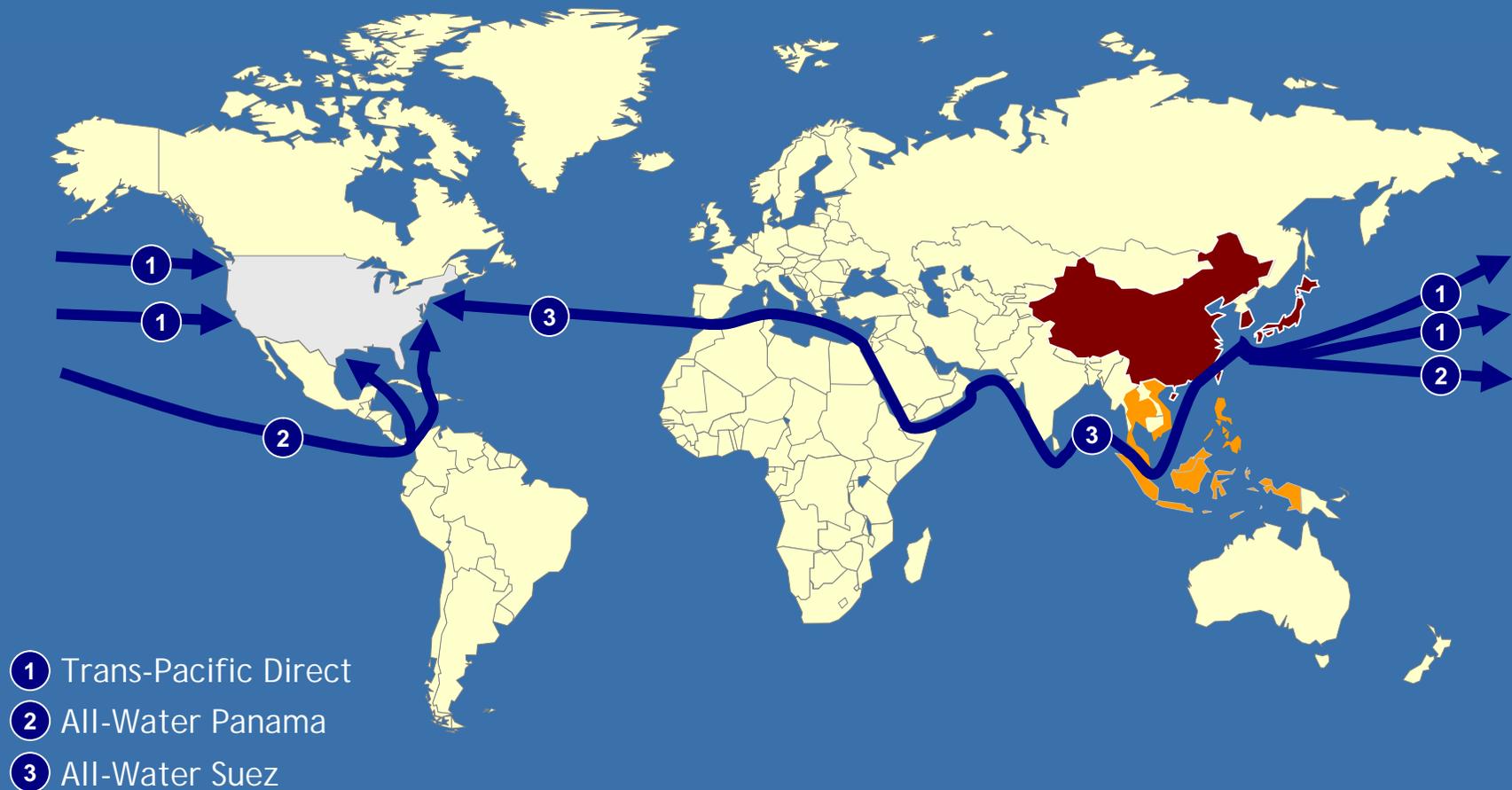


Ocean Shipping 101

Jasper Ocean Terminal



ASIA TRADE WITH US PORT REACHES

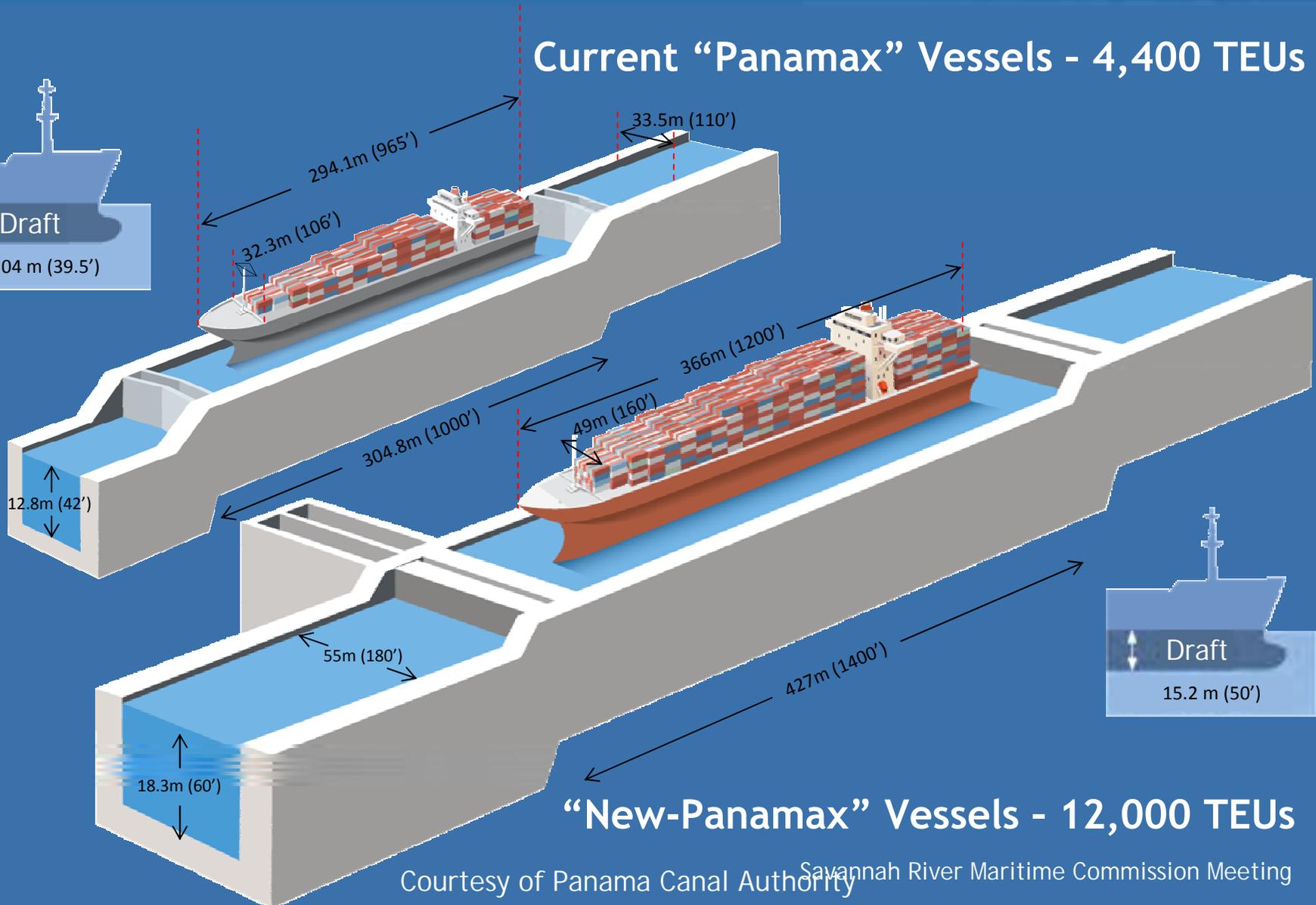


Ocean Shipping 101

Jasper Ocean Terminal



Current "Panamax" Vessels - 4,400 TEUs



"New-Panamax" Vessels - 12,000 TEUs

Courtesy of Panama Canal Authority Savannah River Maritime Commission Meeting

Ocean Shipping 101

Jasper Ocean Terminal



- The Container Ship

- 10,000 TEU vessel
- Equivalent of 5,000 - 40 foot containers
- 12,000 pairs of Nikes per container
- Equivalent of 60,000,000 pairs per vessel
- Value = \$4,500,000,000.00 @ \$75.00/pair
- Transportation cost = \$0.30 / pair



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10,000 TEU Vessel Carrying Capacity



1
10,000 TEU
Container
Ship



18
8,000 Foot
Double-Stack
Trains
(27 Miles)
(50 Acres)



5,800
Trucks
(60 Miles)
(95 Acres)



570
Boeing 747
Cargo Liners

DISCHARGE OR LOAD ONLY!



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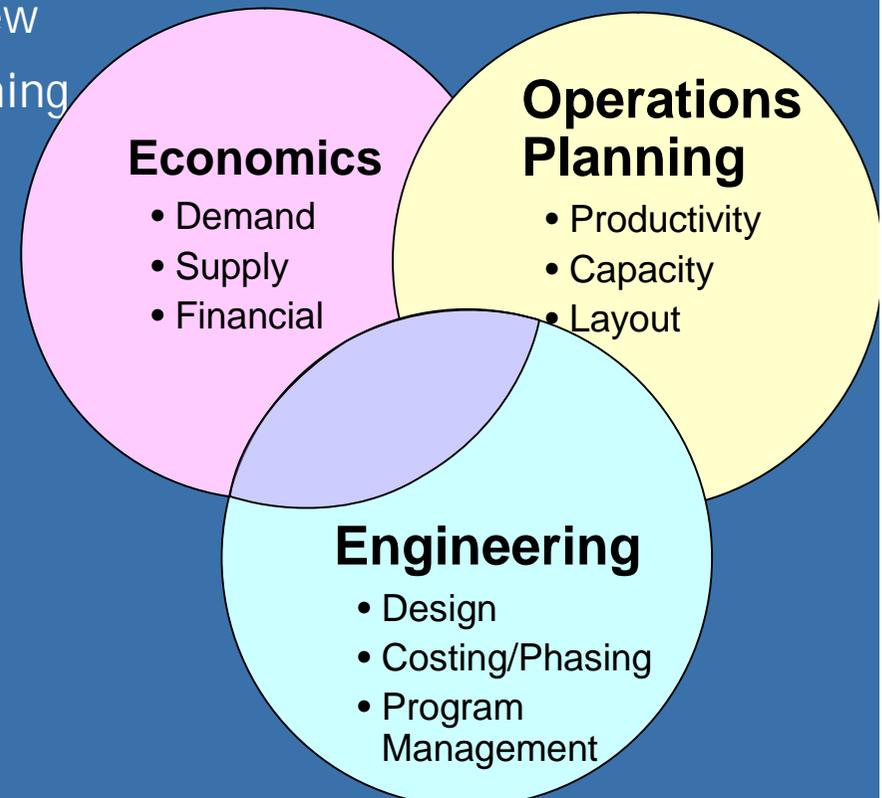
Program Management Services

Jasper Ocean Terminal



• Program Management Tasks

- Task One - DMMP Feasibility Study
- Task Two - Economics Analyses & Market Study
- Task Three - Data Collection and Review
- Task Four - Preliminary Terminal Planning
- Task Five - Environmental Services
- Task Six - Project Budget & Schedule



Program Management Services

Jasper Ocean Terminal



- Task One - DMMP Feasibility Study
- Goal
 - Develop potential alternatives for mitigating impacts of the JOT on the existing Savannah Harbor Navigation Channel DMMP
- Activities
 - Review the existing DMMP
 - Coordinate with USACE Savannah District
 - Determine Potential Effects to the existing DMMP
 - Develop alternatives & provide recommendation
 - Identify NEPA and permitting requirements for the alternatives
 - Prepare DMMP Feasibility Study
- Progress Status - 50%

Program Management Services



- Task Two – Economics Analyses & Market Study
- Goals
 - Develop a market analyses and forecasts to support the estimation of the magnitude, timing and growth demand for the JOT.
 - Provide economic and financial analyses to support the financial feasibility of the JOT.

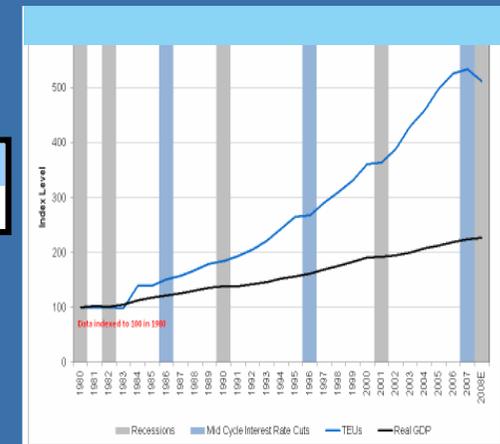
- Activities

- Update U.S. container forecast
- Competitive analysis
- Demand and capacity dynamics
- Development of financial models

- Progress Status

- Preliminary Analysis Complete
- Update to Start January 2010

Period	USTEU CAGR	US Real GDP CAGR	TEU/GDP Ratio
1980-2007	6.2%	3.0%	2.0
1997-2007	6.3%	2.9%	2.2



Program Management Services

Jasper Ocean Terminal



- Task Three - Data Collection and Review
- Goal
 - Collect, review and interpret all pertinent information related to the JOT project
- Activities
 - Geotechnical data - January 2007 program
 - Topographic and hydrographic survey of JOT site
 - Aerial Photography of JOT Site and Area
 - Water quality data and standards review (SC & GA)
- Progress Status - 90%

Program Management Services

Jasper Ocean Terminal



- Task Four - Preliminary Terminal Planning

- Goal

- Plan and develop different elements of the JOT facilities including terminal, roads, rail, and utilities.

- Activities

- Siting Alternatives Study
- Terminal size and location
- Conceptual site plans
- Transportation planning (roads and bridges)
- Rail planning
- Utilities (electric, sanitary sewage, potable & fire water, etc.)
- JOT Basis of Design documents



- Progress Status - 40%

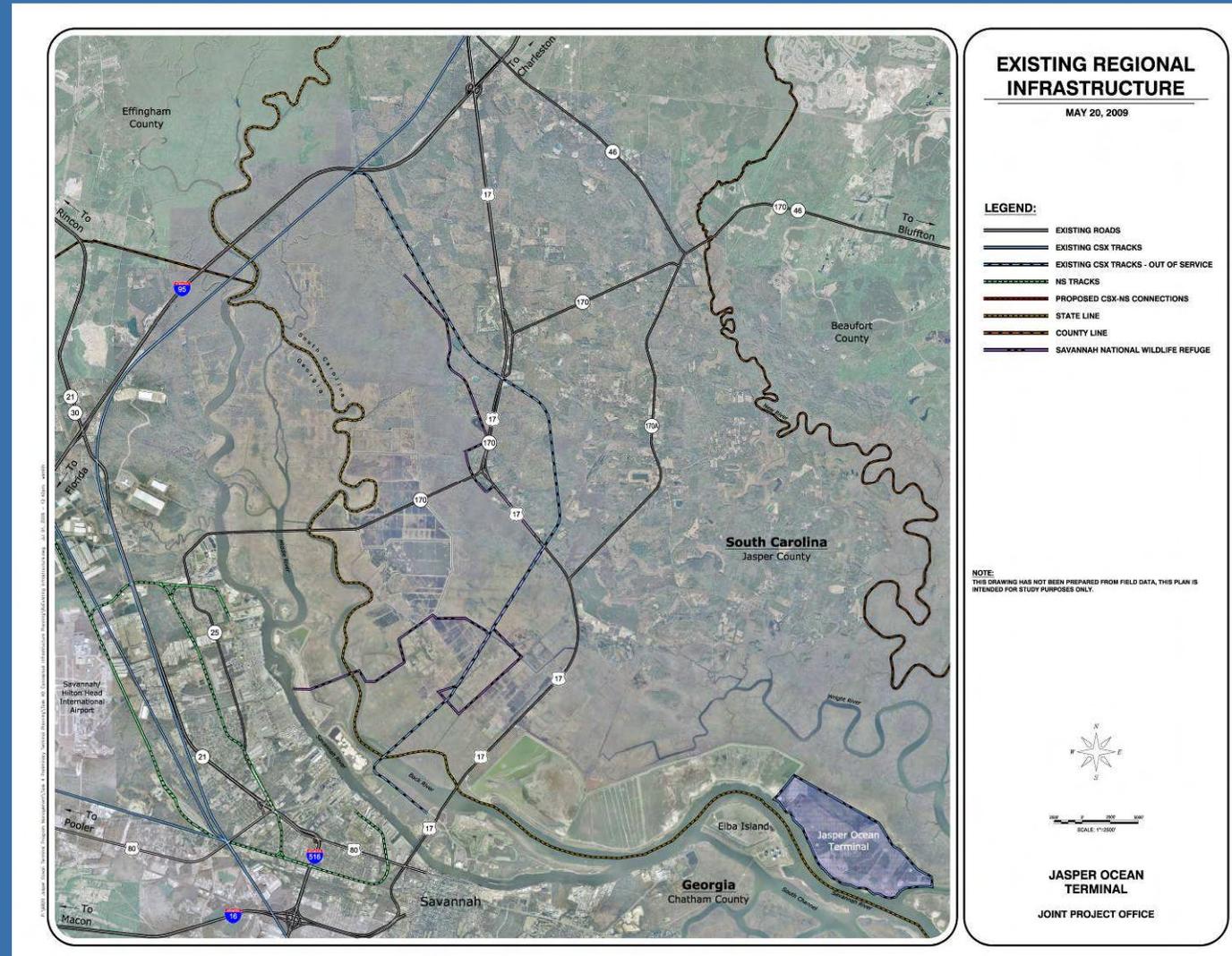
Program Management Services

Jasper Ocean Terminal



- Infrastructure

- Roads
- Rails
- Utilities



Program Management Services

Jasper Ocean Terminal



- Task Five – Environmental Services Goals
 - Develop an approach for preparing a Draft Purpose and Need Statement
 - Preliminary identification of environmentally reasonable and feasible alternatives
 - Collection of environmental and cultural resource information to adequately assess the project's impacts.
 - Complete many of the scientific studies that are needed to support the future NEPA process for the project.
- Activities
 - Initiate preliminary studies in support of Pre-NEPA project site evaluations
 - Literature, information, data collection, & database development
 - Agency meetings (Introductory/Project Orientation)
 - Wetland delineation
 - Wetland impact assessment and mitigation options

Program Management Services

Jasper Ocean Terminal



• Task Five Activities (Continued)

- Protected species and wildlife assessment
- Benthic community assessment
- Sediment assessment
- Archaeological survey
- Biological assessments
- Essential fish habitat assessment
- Phase 1 environmental property assessment
- Hydrodynamics, water quality, and sedimentation
- Air emissions
- Annotated EIS outline and Notice of Intent
- Agency and Public Scoping for the NEPA EIS Process



• Progress Status - 60%

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Program Management Services

Jasper Ocean Terminal



- Task Six - Project Budget & Schedule
- Goal
 - Develop an overall terminal development budget and schedule for the JOT for Phase 1 and Future Build-out
- Activities
 - Prepare conceptual level budget
 - Prepare development schedule
- Progress Status - 5%

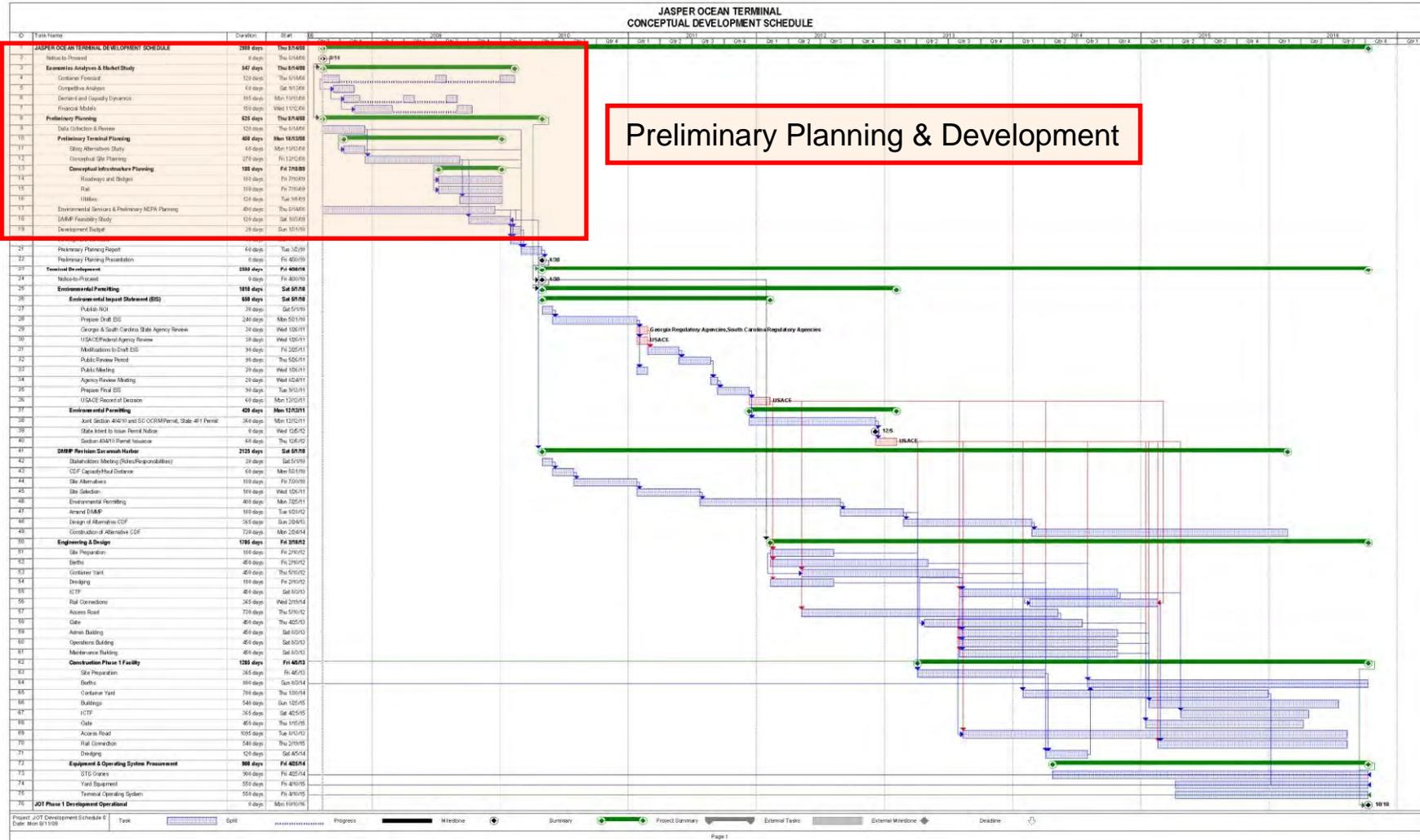
JOT Development Schedule

Jasper Ocean Terminal



- Terminal Development (Phase 1) 10 - 12 Years
 - Economics & Market Study Combined with Preliminary Planning 2 Years
 - Terminal Design & Construction 8 to 10 Years
 - ✓ NEPA Environmental Impact Statement & Record of Decision
 - ✓ Environmental Permitting
 - ✓ Savannah Harbor DMMP Impacts
 - ✓ Engineering Design
 - ✓ Construction
 - ✓ Equipment and Operating Systems
- Currently in first two years!!

JOT Development Schedule



Future Opportunities

Jasper Ocean Terminal



- Joint Project Office is Focused on Utilizing Georgia & South Carolina Firms
- Working Together to Build a Better Future for the Georgia & South Carolina Economies



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