

**CH2MHILL®**

## **Czech Nuclear Forum**

*'the demands of the world wide and UK new build programme'*

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# CH2M HILL is focused on managing large complex high profile programmes worldwide providing customers with a diverse and global experience



Golden Ears Bridge,  
Vancouver, B.C.



North Slope, AK, USA



Idaho Cleanup Project, ID,  
USA  
\$2.9 B



Cross London Rail Links,  
UK \$26.2 B



Thames Tideway, UK  
\$5 B



London 2012 Olympic and  
Paralympic Games, UK  
\$10.6 B

- **Global company headquartered in USA**
- **30,000 employees worldwide**
- **\$6.4 billion in revenue (2011)**
- **100 percent owned by employees**
- **Diversified across multiple business sectors**
- **Performing work in more than 90 countries**
- **More than 16,000 active projects (June 2012) including many high profile ones**
- **Growing capabilities in the UK along with acquisition of Halcrow in 2011**



Hanford Plateau Remediation  
Contract, WA, USA  
\$4.5 B



Panama Canal Expansion  
\$5.3 B



Rocky Flats Closure  
Project, CO, USA  
\$7.2 B



Emirates Nuclear Energy  
Corporation, Abu Dhabi,  
UAE \$20 B



ADSSC Strategic Tunnel  
Enhancement Program  
\$2 B



Darling Downs 600MW  
Power Station, Australia  
\$4.5 B



U.S. Base Relocation  
Program, South Korea  
\$10 B

# CH2M HILL was founded in 1946 and the name continues to reflect its founder and their values

Holly **C**ornell



James **H**owland



Burke **H**ayes



Fred **M**erryfield



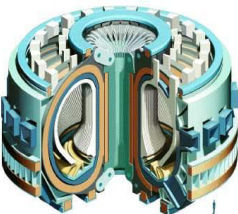
Clair **H**ill



Values Established  
65 Years Ago,  
Still Strong Today

# CH2MHILL

# A view of demand for nuclear services globally over the next decade and beyond across all sectors



- Currently 77 New NPP are in construction, 180 in planning and 346 being considered in 45 countries including:
  - significant developments in Russia, China and India
  - 16 emerging nuclear countries
- 430 operating NPP in 31 countries many with extensive upgrade, safety and life-extension programmes including post Fukushima safety assessment outcomes
- Decommissioning activities underway or needed at over 385 sites world-wide and increasing
- Major clean-up activities at more than 100 sites world-wide including Chernobyl and Fukushima
- Research into new Generation IV activities, Fusion and SMRs etc.
- Many defence activities in some countries

**There is likely to be a large demand for nuclear services world wide**

# Anticipated demands in the UK over the next decade

- 16GWe of new NPP required by 2030
  - Suggests 12 to 15 new NPP to be built with more possible
  - Current participants EDF, Horizon and NuGen
- 8 operating power stations with an average 7 year life extensions and various upgrades to be accomplished
- Large decommissioning/ clean-up programme through NDA at Sellafield, Dounreay and 12 other sites
- Construction of Geological Disposal Facility (GDF)
- UK's nuclear deterrent and submarine programme
- Note the context of other infrastructure programmes



**Across nuclear design, manufacturing and construction sectors  
including consultancy support**

# What the challenges remain in the UK

- **Decommissioning and clean up is pretty well know!**
    - Subject to constant funding issues
    - PBO changes etc.
    - Getting the Geological Disposal Facility progressing
  - **New build – is a game changer for the UK's nuclear sector**
    - Getting positive Investment decisions for new NPP
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- Getting familiar with ABWR technology
  - Getting industry confident in investing in/ building capability/ capacity
  - Keeping pace with rest of world
  - Avoiding an 'importing mentality' and look to develop international ties
  - Deploying programme management skills to secure business cases
  - Competing with other sector demands in the UK