

The  
**Sun Corridor**  
in the  
**21st Century**  
**Global Network**

A presentation for  
**Maricopa Association of Governments**

Presented by  
**Michael Gallis & Associates**

June 13, 2012

**GLOBAL**

**REVOLUTION**

# What has changed?

Since 1990

## 1. An Integrated Network:

People, goods and information  
move continuously around the world

## 2. A New Geography:

Redefined market areas;  
Trading Blocs and Regions

## 3. A New Economy:

Globalization of the marketplace;  
Effect of technology on economic activity

# What has changed?

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Effect of technology on economic activity

# 1990 - 2000

## GLOBAL ECONOMICS

# GATT poised to create new world order

### Trade agreement could help U.S. double its exports

By Bob Deans  
WASHINGTON BUREAU

If India's low-cost, sun-swept plains produce the world's best cotton sweaters, so

The more such a country sells to America, the more money India has to spend on Whitney Houston and trips aboard Delta Air Lines.

So goes the thinking behind a protracted round of negotiations

workers could lose jobs in industries that would be threatened by low-cost foreign competition.

A big loser could be the textile and apparel industry, which is a big player in Georgia's economy. However, the threat could be as severe to producers who have improved their productivity and efficiency, as the state have done.

President Clinton is betting on a new world trading order. U.S. industries with far more winners than losers.

Jobs, rewarding career paths, and expanded horizons for Americans can only expand exports. Clinton said he is ready to commit to a win-win.

negotiators are working to reach a deal by Wednesday. Clinton would lose if the agreement is not approved without the support of Congress. Without approval, the track would be set.

## The pact's potential impact

Some examples of which exports and imports may increase in certain nations:

**UNITED STATES**  
Exports: Financial and communications services  
Imports: Textiles and apparel

**GERMANY**  
Exports: Chemicals  
Imports: Processed food



**HIGH TECH NEW ACCOUNTING GAMES** (P. 50)

**AUTOS REDEFINING QUALITY** (P. 80)

**AETNA THE PRICE OF ITS COMEBACK** (P. 86)

**GIFTS OUR ANNUAL GUIDE** (P. 104)

# BusinessWeek

## THE RISE OF INDIA

And what it means for America

## Hitching a Ride in the Global Fast Lane

Motown Greet Merger Plans As Good News



## NAFTA JAM

Free trade agreement puts heavy load on Mexican-border town's infrastructure

COVER STORY



The Regina Maersk lowers its antenna to pass under the Cooper River Bridge as it leaves the Port of Charleston Monday. At 1,043 feet in length, the Regina Maersk is the largest container ship ever to call on North America.

## Make room for a sea monster

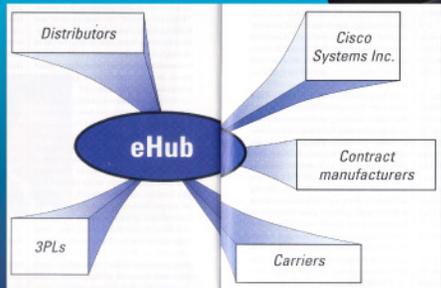
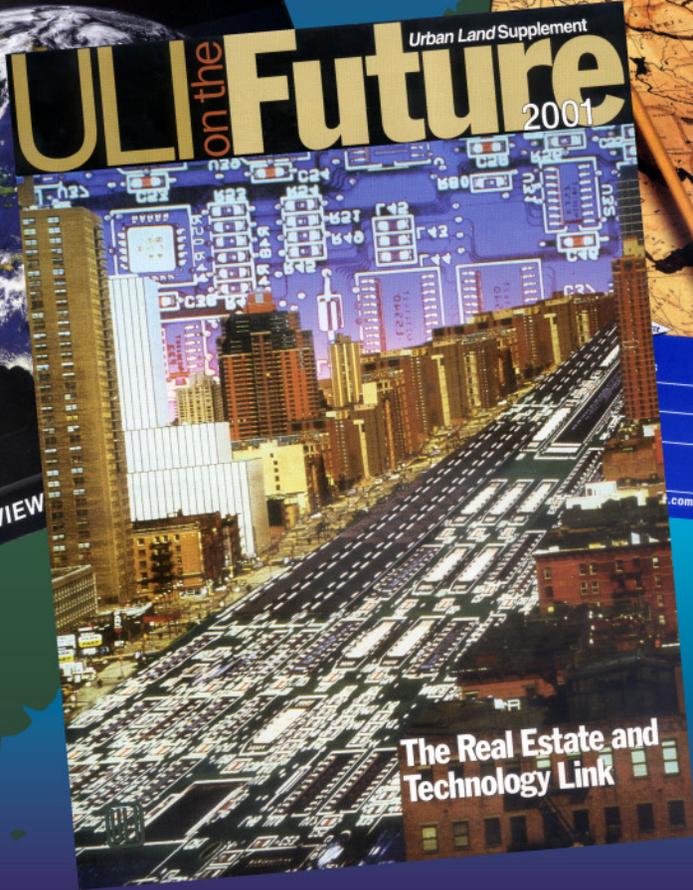
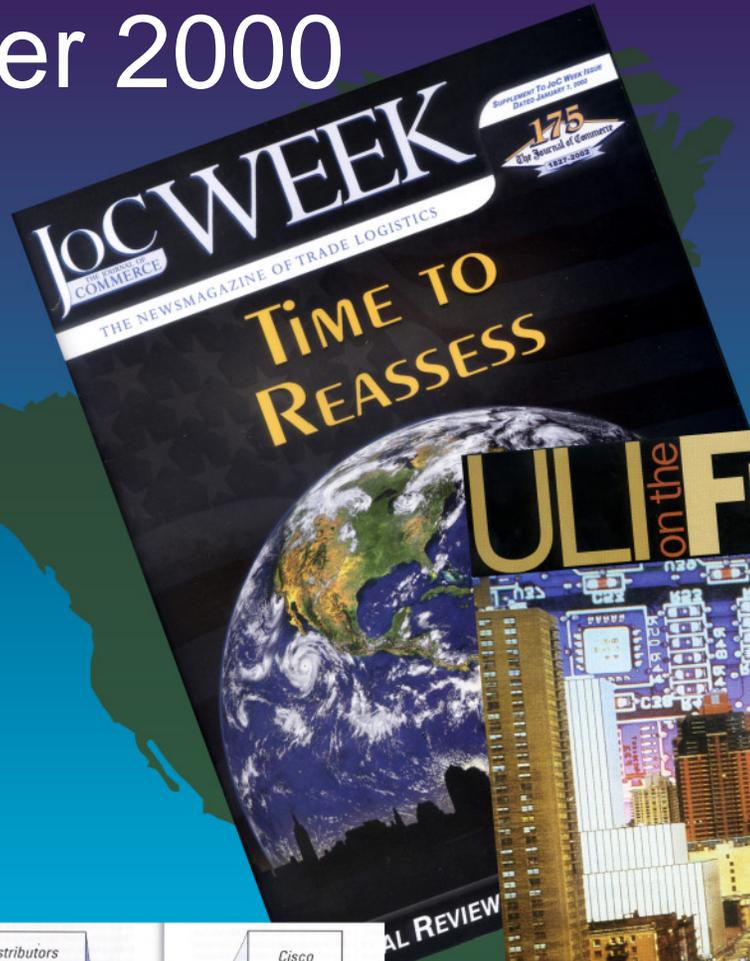
### Biggest container ship ever calls on Port of Charleston

on Charleston has 4,499 TEUs, and the first container ship to call on the port, in 1966, had 600.

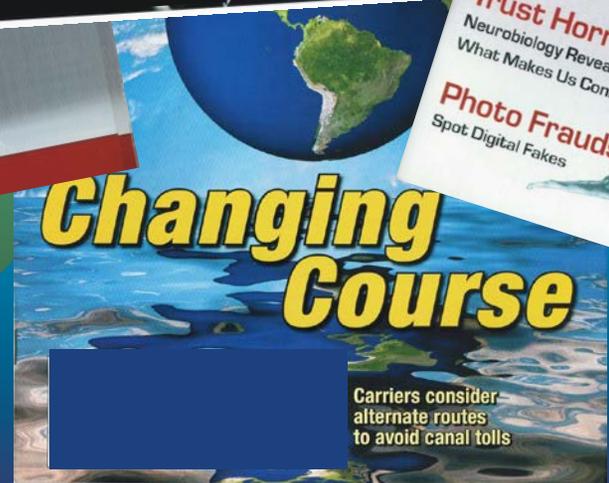
## MEXICAN MAKEOVER

NAFTA creates the world's newest industrial power

# After 2000



After 2008



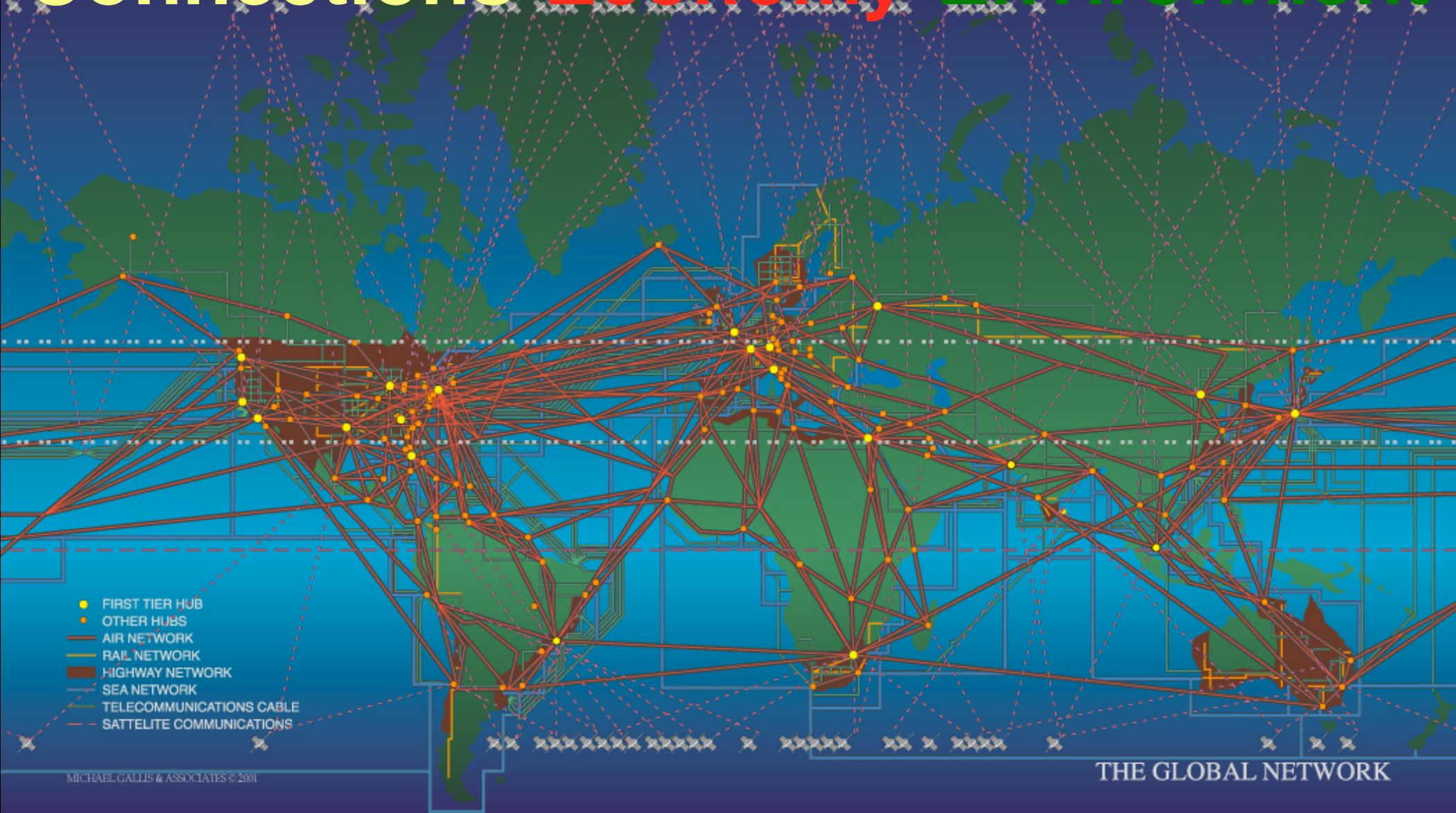
**UNCERTAINTY**

**INSECURITY**

*"How you're doing depends  
on where you want to be."*

- James Murray, US Naval War College

# Connections • Economy • Environment

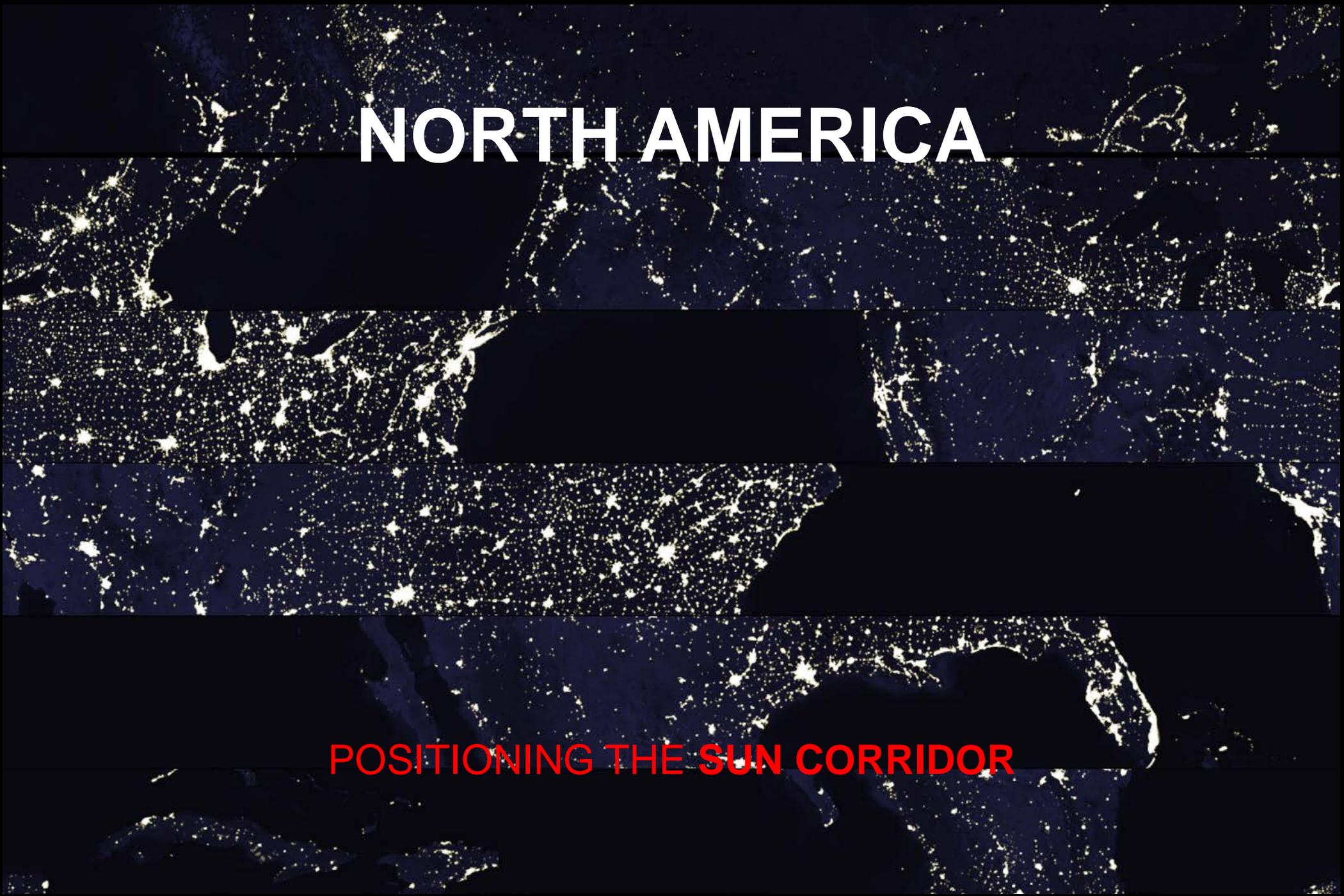


# The Shape of the Future

**The World Bank projected the world economy to grow 33% between year 2000 and 2010, increasing from \$31.8 trillion to \$40 trillion.  
(Reached \$63 trillion in 2010)**

**However, the world economy could grow by approx. 360% by the year 2050, increasing from \$31 trillion to \$132 trillion (mg&a est).**

# NORTH AMERICA



POSITIONING THE SUN CORRIDOR

# **Sun Corridor**

**What are the Big Opportunities?  
How Do They Fit Together?**

**Access to the Global Marketplace**

**Direction of the Economy**

**Trends in Environment & Urbanization**

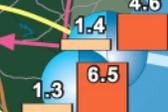
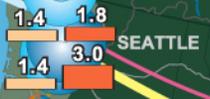
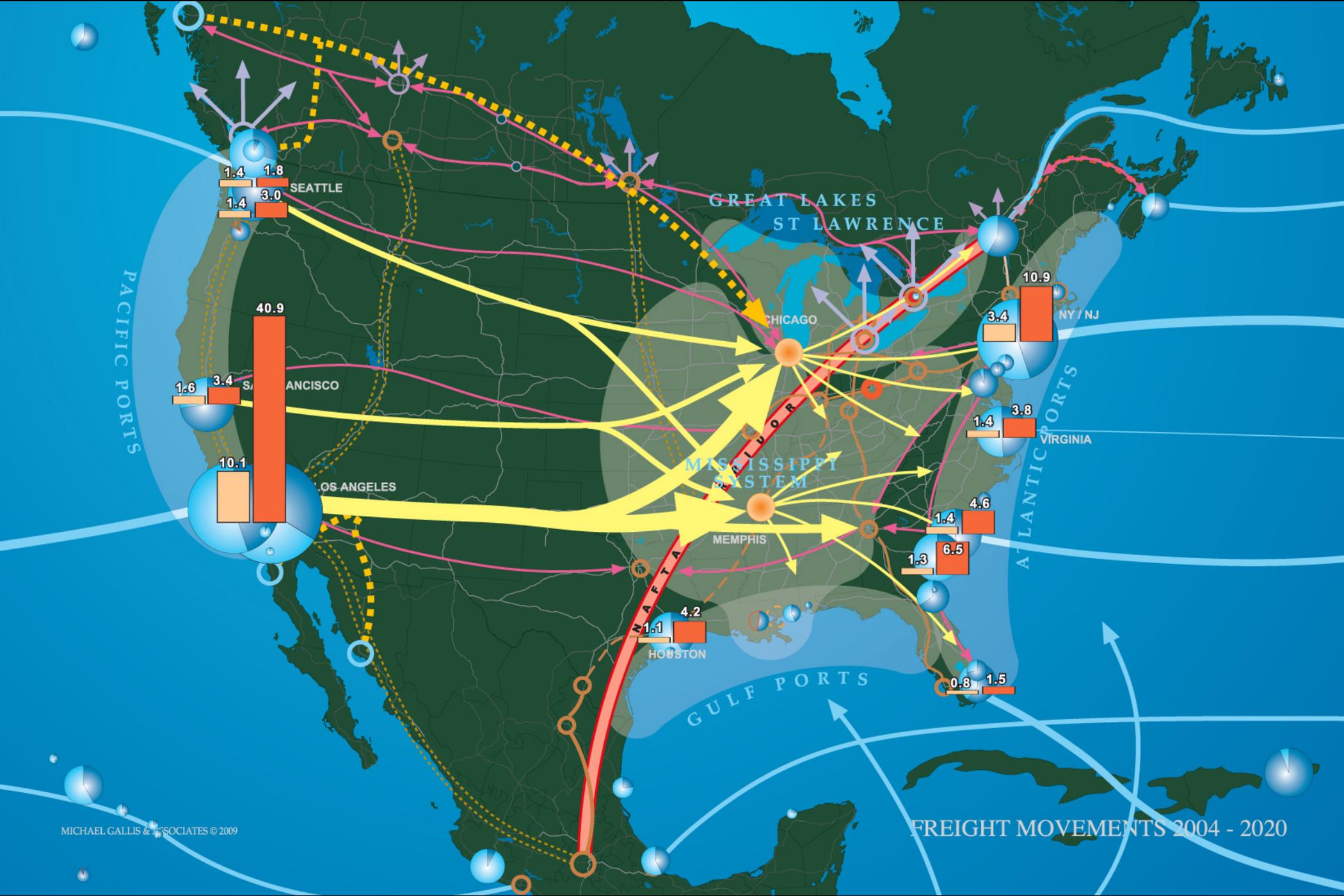
# **TRANSPORTATION / INFRASTRUCTURE**

## **Position in the Global Network**

**A. Transportation – All Modes**

**A. Communications**

**A. Power & Utilities**





— HIGHLY CONGESTED  
— CONGESTED  
— UNCONGESTED

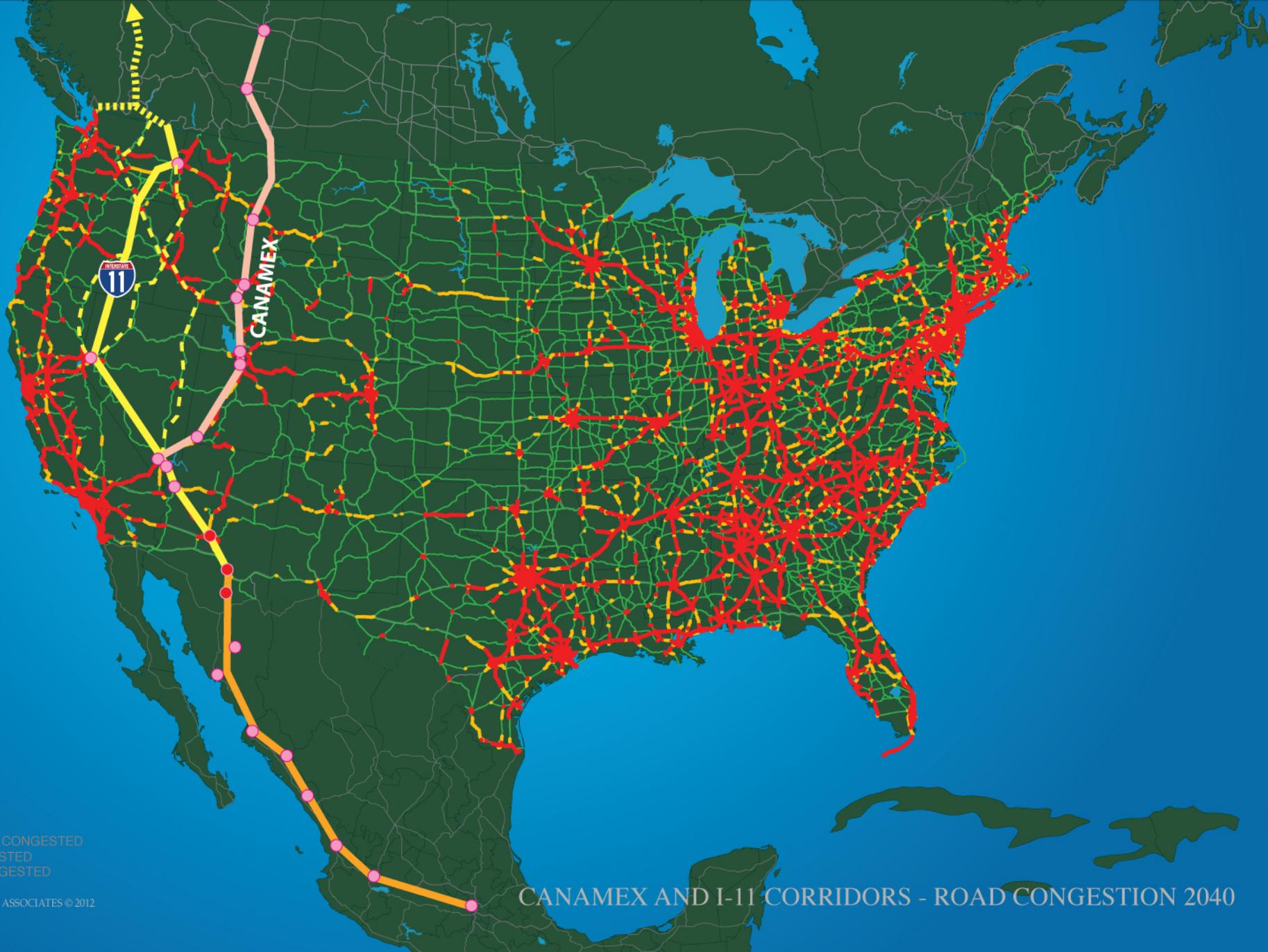
MICHAEL GALLIS & ASSOCIATES © 2011

PEAK PERIOD HIGHWAY CONGESTION - 2040



- 
- ABOVE CAPACITY (LOS F)
  - AT CAPACITY (LOS E)
  - NEAR CAPACITY (LOS D)
  - BELOW CAPACITY (LOS A,B,C)



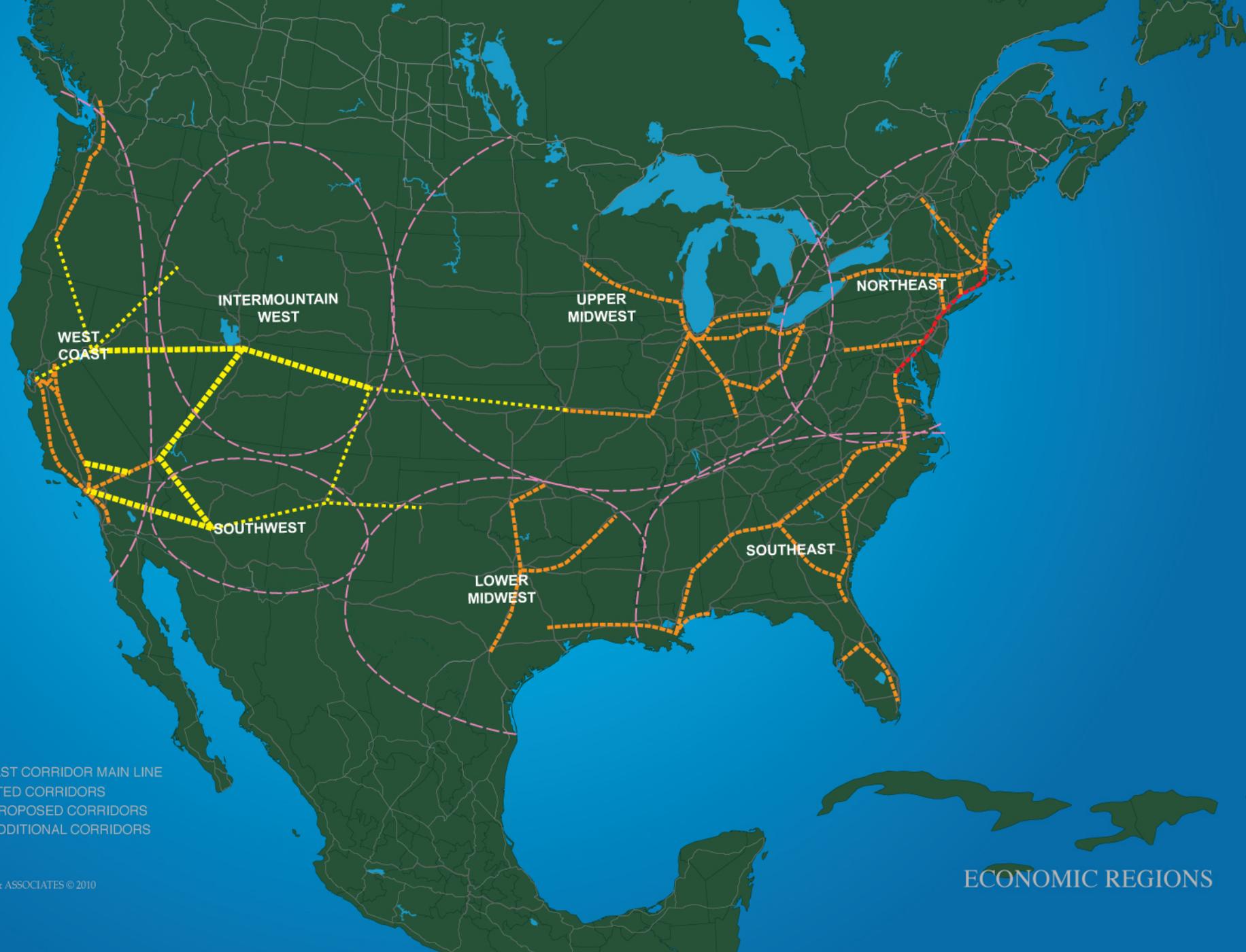


- HIGHLY CONGESTED
- CONGESTED
- UNCONGESTED

MICHAEL GALLIS & ASSOCIATES © 2012

### CANAMEX AND I-11 CORRIDORS - ROAD CONGESTION 2040





- NORTH EAST CORRIDOR MAIN LINE
- DESIGNATED CORRIDORS
- WHSRA PROPOSED CORRIDORS
- WHSRA ADDITIONAL CORRIDORS



● AIR HUB BY 2011 INTERNATIONAL ENFLIGHTMENTS

# One or Two-Stops to the World

MICHAEL GALLIS & ASSOCIATES © 2011

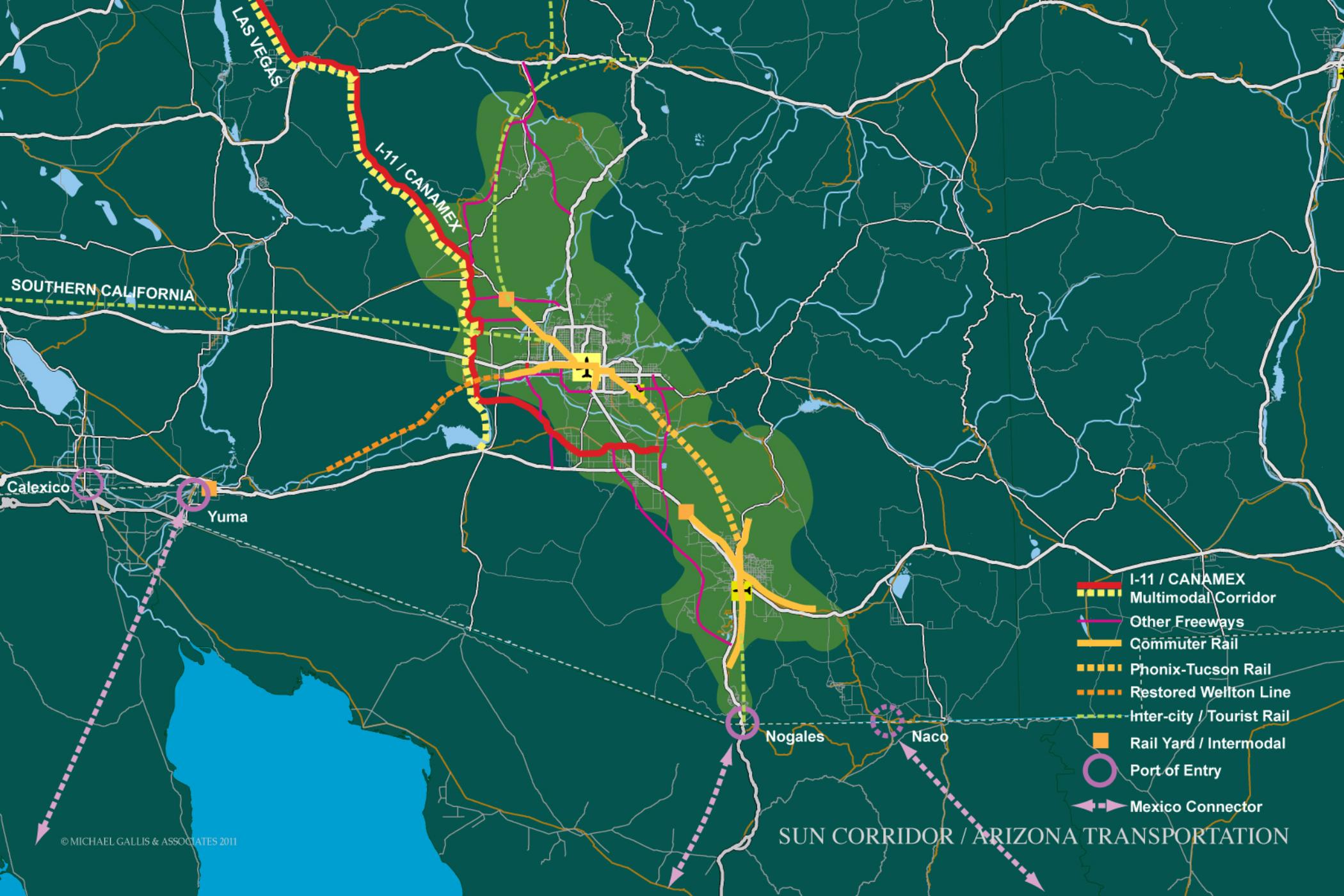
INTERNATIONAL AIR HUBS - TOP 40, 2011



SOURCE: OAG - APRIL 2012

MICHAEL GALLIS & ASSOCIATES  
V1 4-30-12

NON-STOP INTERNATIONAL FLIGHTS - PHOENIX - 2012



- I-11 / CANAMEX
- Multimodal Corridor
- Other Freeways
- Commuter Rail
- Phoenix-Tucson Rail
- Restored Wellton Line
- Inter-city / Tourist Rail
- Rail Yard / Intermodal
- Port of Entry
- Mexico Connector

# Opportunities

Increase Freight Activity, Hub & Distribution  
Improve Regional Efficiency

- A. **Roads:** I-11, CANAMEX
- B. **Rail:** Ports of Entry, Wellton Line, Red Rock
- C. **Air:** Phoenix-Mesa Gateway Airport
- D. **Transit:** Regional System

Develop Power Export Capacity  
Efficient Use of Water

# **ECONOMIC DEVELOPMENT**

## **Product in the Global Marketplace**

- A. Existing Economy**
- A. Economic Evolution**
- A. Trends & New Initiatives**



# Economy

## Traditional

### 5 C's

Cattle

Cotton

Citrus

Copper

Climate

*Tourism*

6<sup>th</sup> C: Culture

## New

Clean Tech

Aerospace & Aviation

Aerospace Suppliers

Biosciences

Electronics Suppliers

Advanced

Business Services

# Only 3 Ways to Grow

- **Grow the existing**

- Retention
- Expansion
- Shifts (Conversion to tap into new opportunities)

- **Attract**

- Product Offering
- Barriers
- Targeting

- **New start-ups**

- Identify Commercial Business Opportunities
- Incubation/Support Structure
- Commercialization - Collaborate with Universities & Research Ctrs

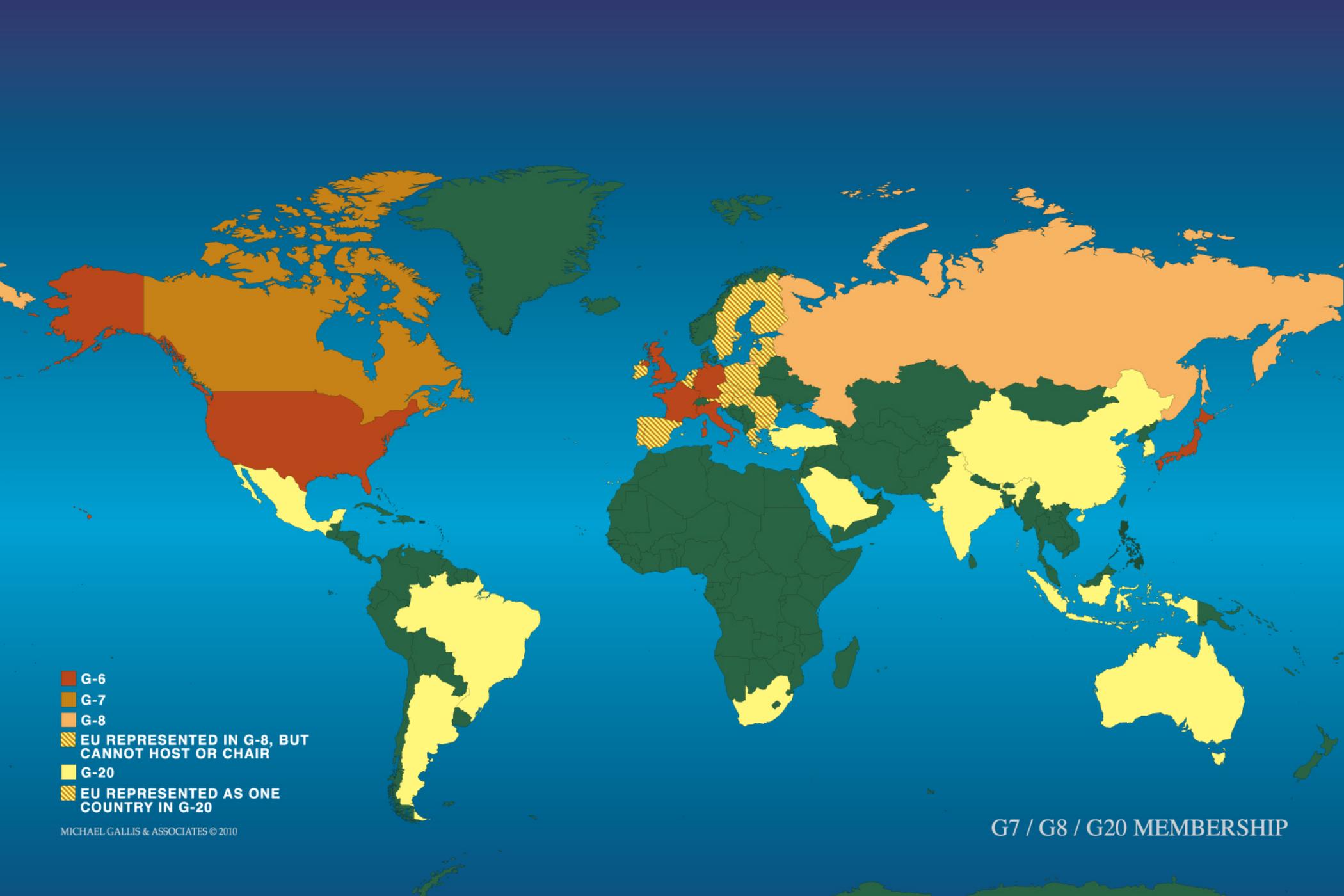
# Only 3 Things to Do

- Product Development
- Marketing
- Recruitment

# Economic Development

## Framework

	RECRUITMENT	MARKETING	PRODUCT DEVELOPMENT
EXISTING	✓	✓	X
ATTRACTION	✓	✓	X
NEW START UPS	X	X	X



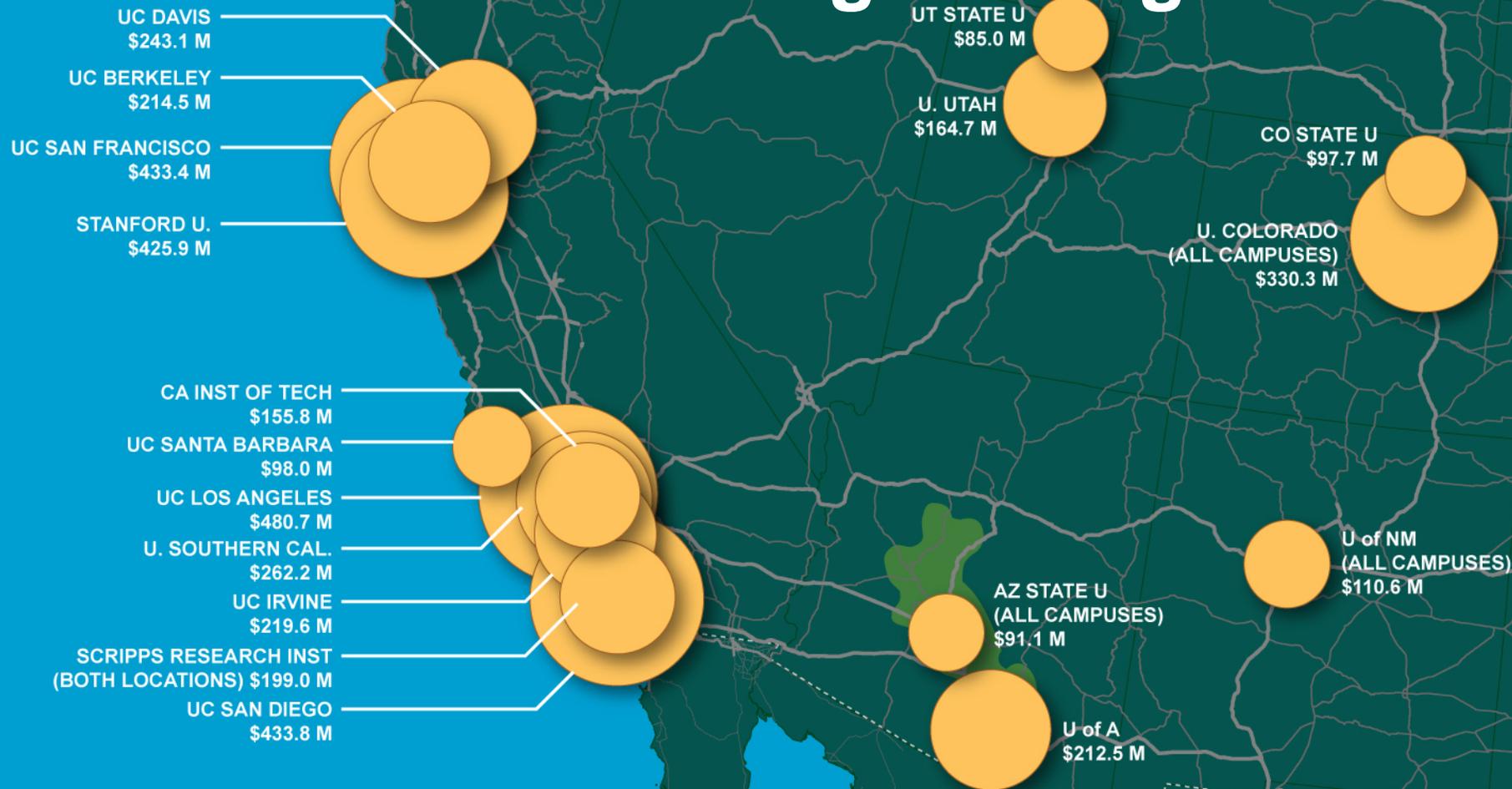
- G-6
- G-7
- G-8
- EU REPRESENTED IN G-8, BUT CANNOT HOST OR CHAIR
- G-20
- EU REPRESENTED AS ONE COUNTRY IN G-20

# Radical Innovation

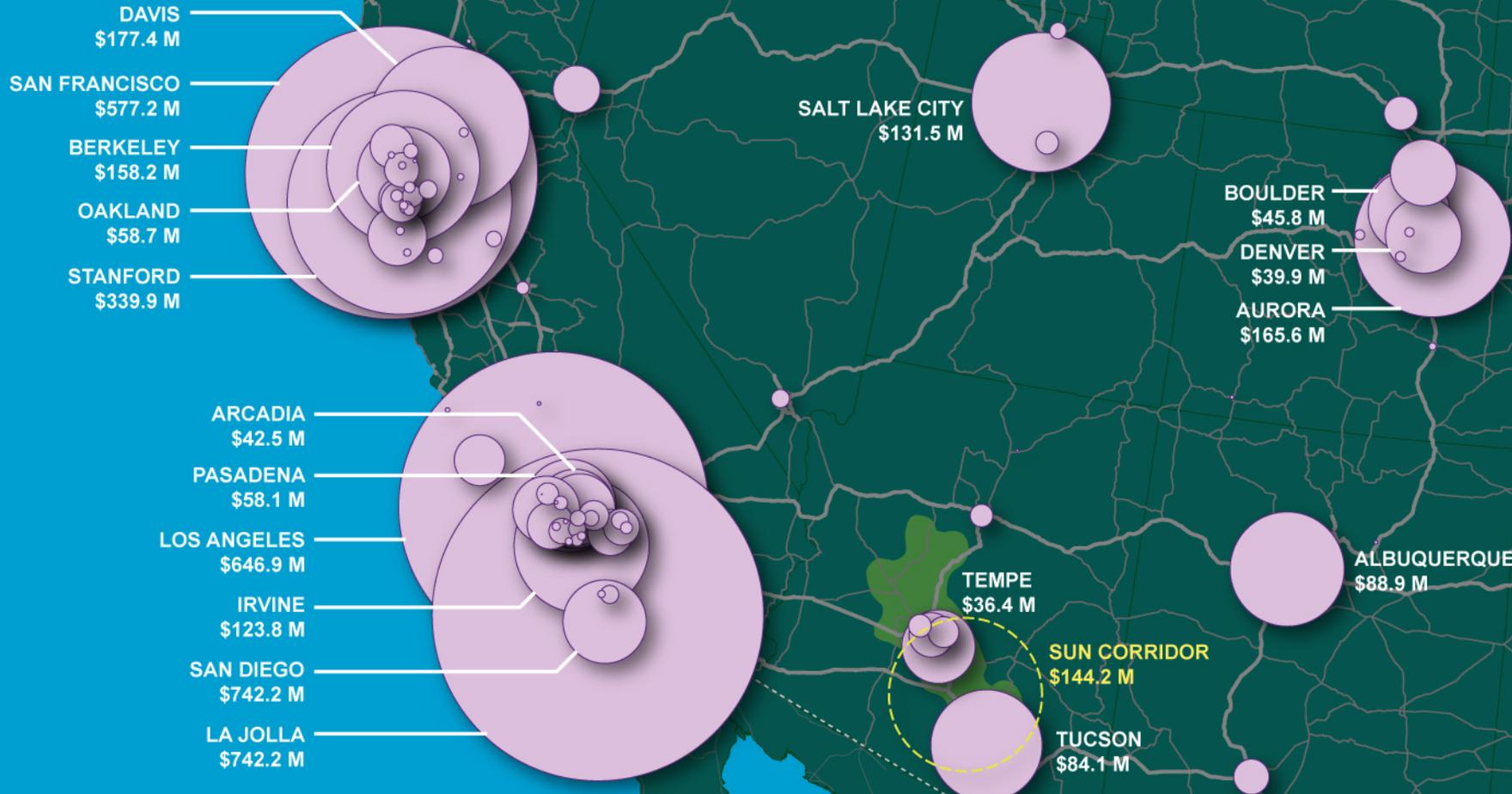
## China's 863 Program

Biotechnology  
Space  
Information  
Laser  
Automation  
Energy  
New Materials  
Marine

# Research: Science & Engineering



# Research: National Institutes of Health



SOURCE: NIH

MICHAEL GALLIS & ASSOCIATES © 2012

NATIONAL INSTITUTES OF HEALTH FUNDING (BY CITY) - 2010

# Economy: Commercial Real Estate

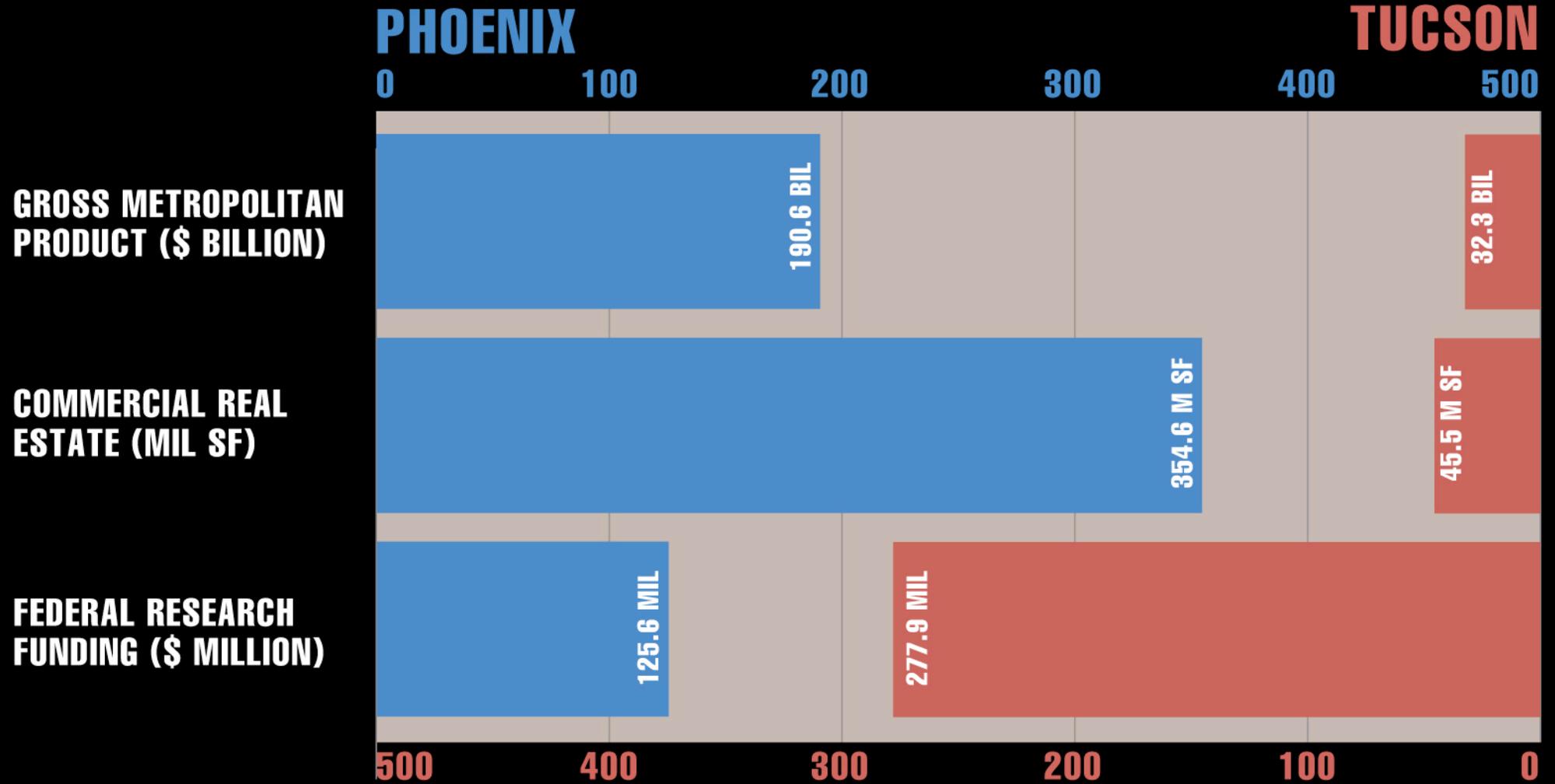


**PHOENIX  
COMMERCIAL  
OFFICE/INDUS.  
354.5 SF / 88.6%**



**TUCSON  
COMMERCIAL  
OFFICE/INDUS.  
45.4 SF / 11.4%**

# Complementary Strengths



# Opportunities

Build Partnerships, Market Workforce,  
Leverage Tourism & Quality of Life

- A. **Clean Tech:** Clean Energy Development Center
- B. **Biosciences:** Medical Devices, Algae, S&T Financing
- C. **Aerospace:** UAVs, Remote Tech
- D. **IT:** Advanced Business Services, IT / Data Centers

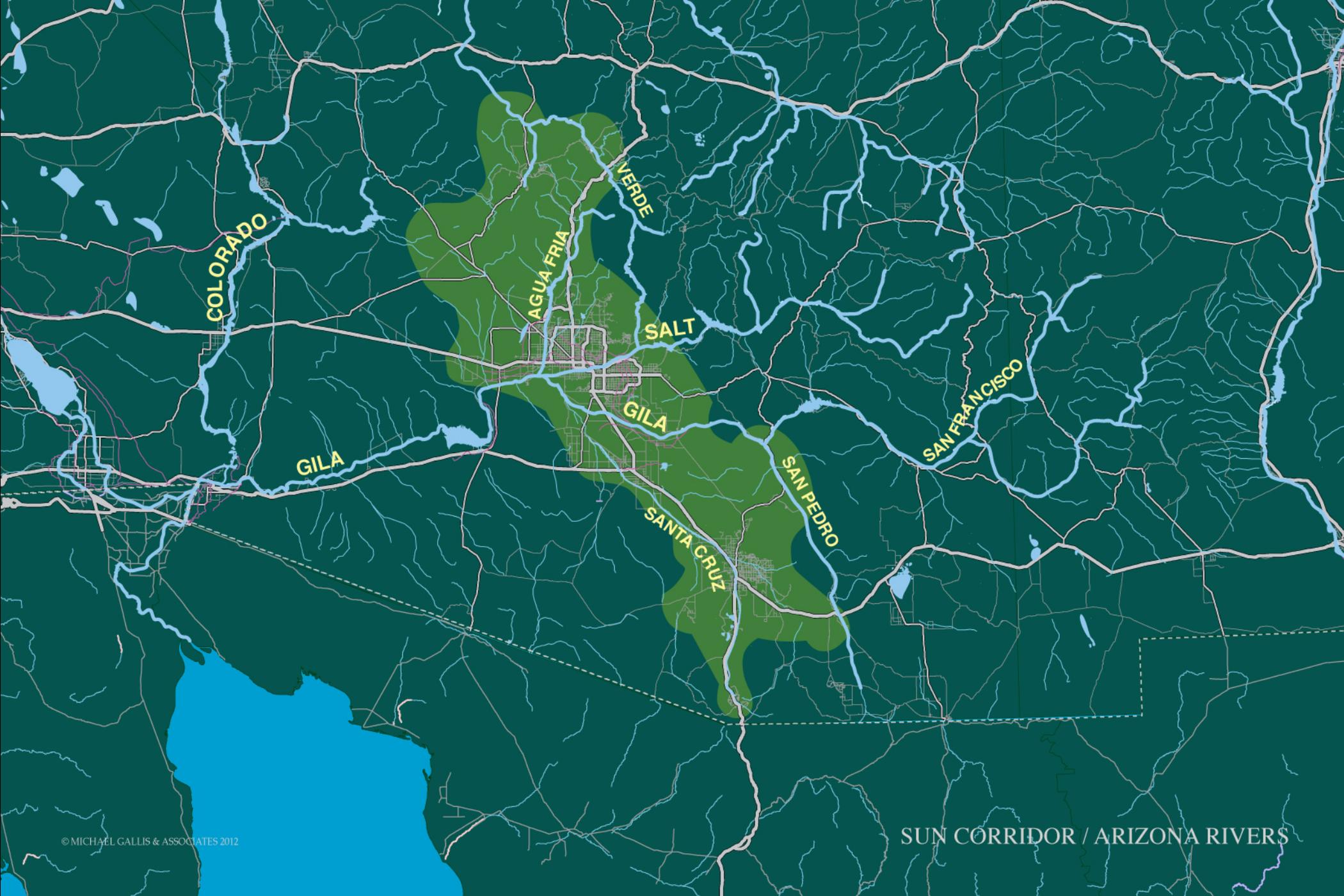
6<sup>th</sup> C: Culture, Coordinate Investments,  
New Econ. Dev. Instruments

# **ENVIRONMENT / URBANIZATION**

## **Natural & Human Systems**

- A. Existing Patterns & Dynamics**
- A. Natural System Resources & Capacities**
- A. Urban Growth Trends**





COLORADO

AGUA FRIA

VERDE

SALT

GILA

GILA

SAN FRANCISCO

SAN PEDRO

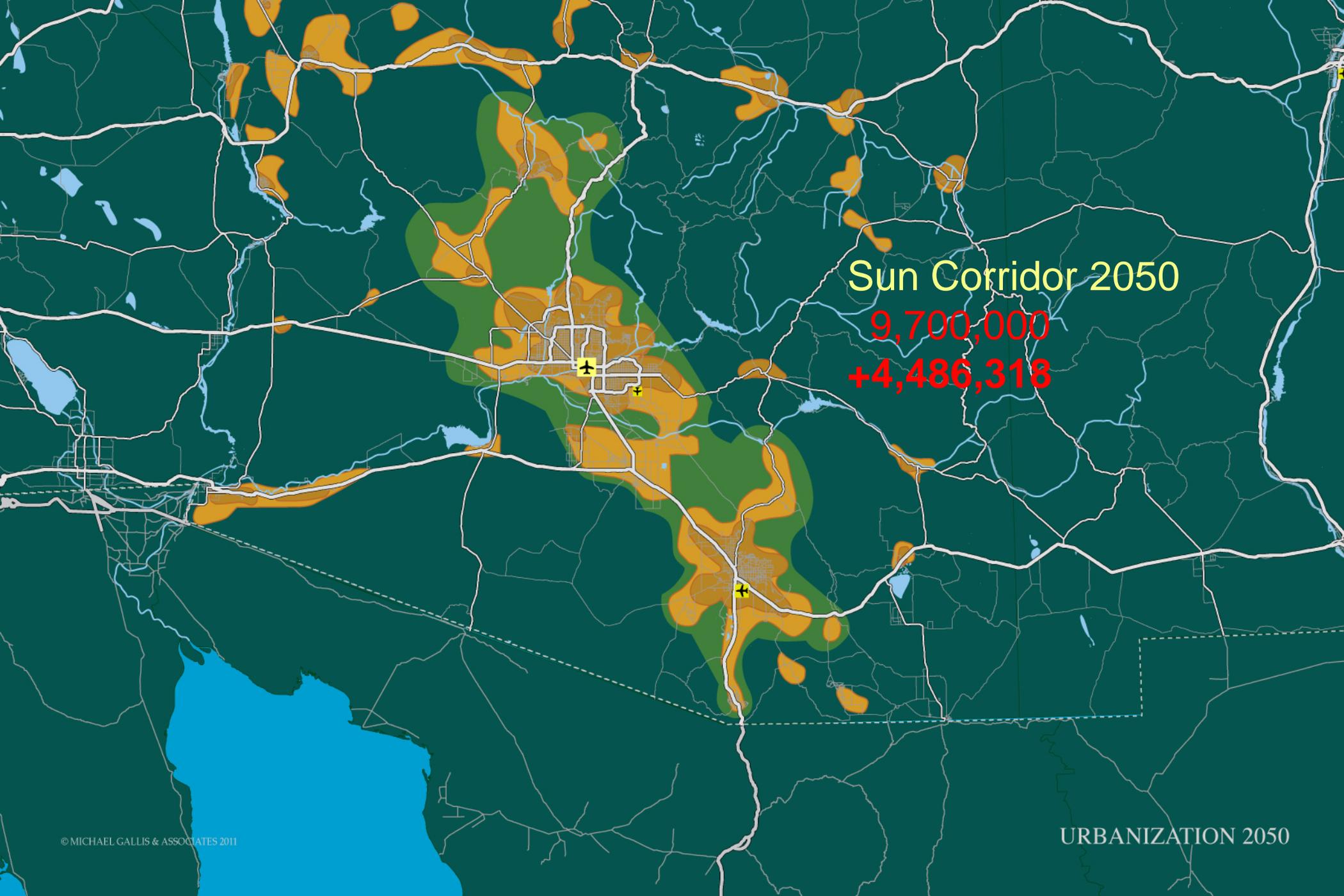
SANTA CRUZ

The map displays the Sun Corridor 2011, a major transportation and urban development corridor in the southwestern United States. It connects the Phoenix metropolitan area in the north to the Tucson metropolitan area in the south. The corridor is highlighted with a green shaded area, indicating the primary route of urbanization. Orange shaded areas represent secondary urbanization zones. Major cities like Phoenix and Tucson are marked with yellow airplane icons. The map also shows a network of roads and water bodies. A dashed white line indicates a boundary or a specific geographic feature.

Sun Corridor 2011  
5,213,682

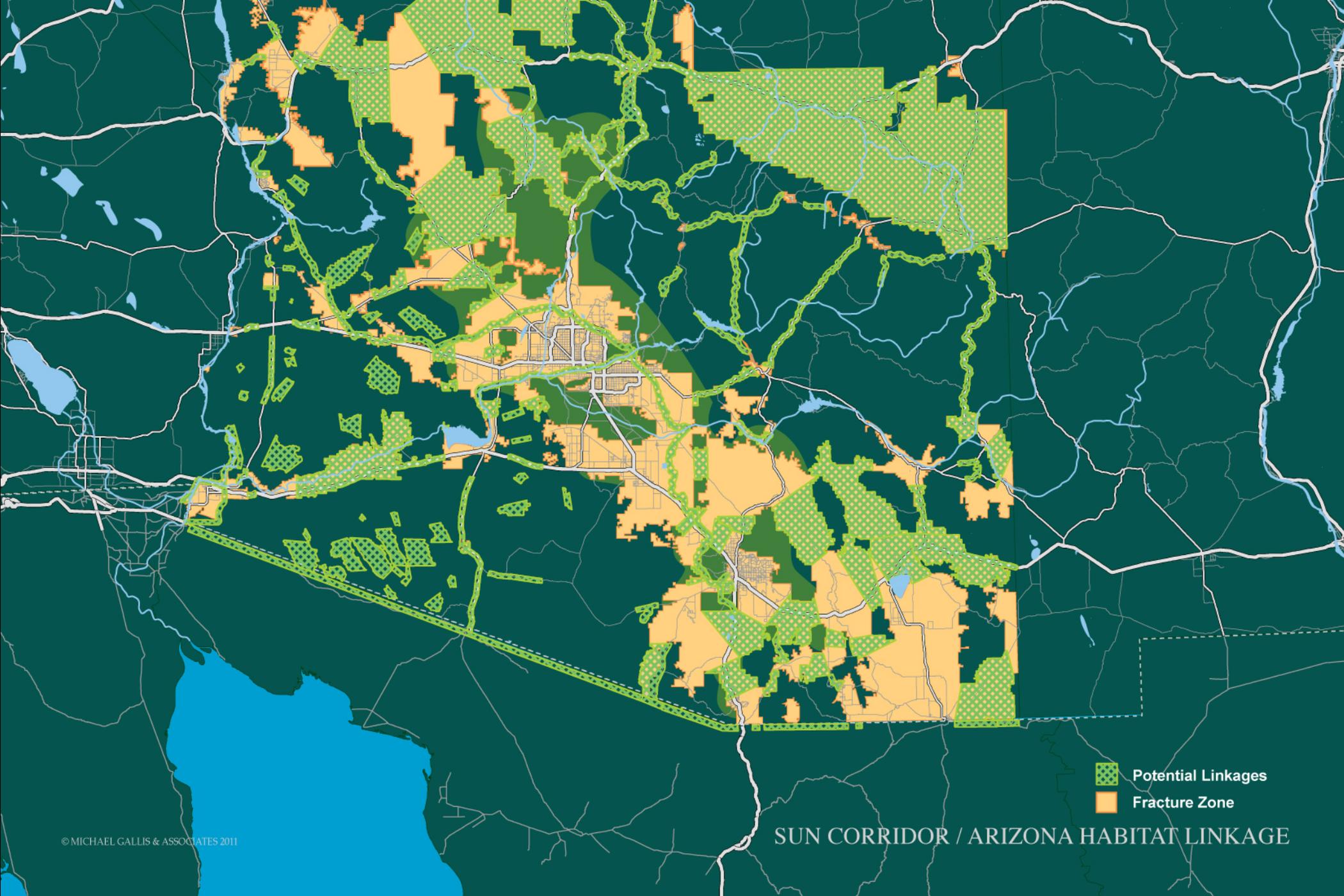
Phoenix

Tucson



## Sun Corridor 2050

9,700,000  
+4,486,318



-  Potential Linkages
-  Fracture Zone

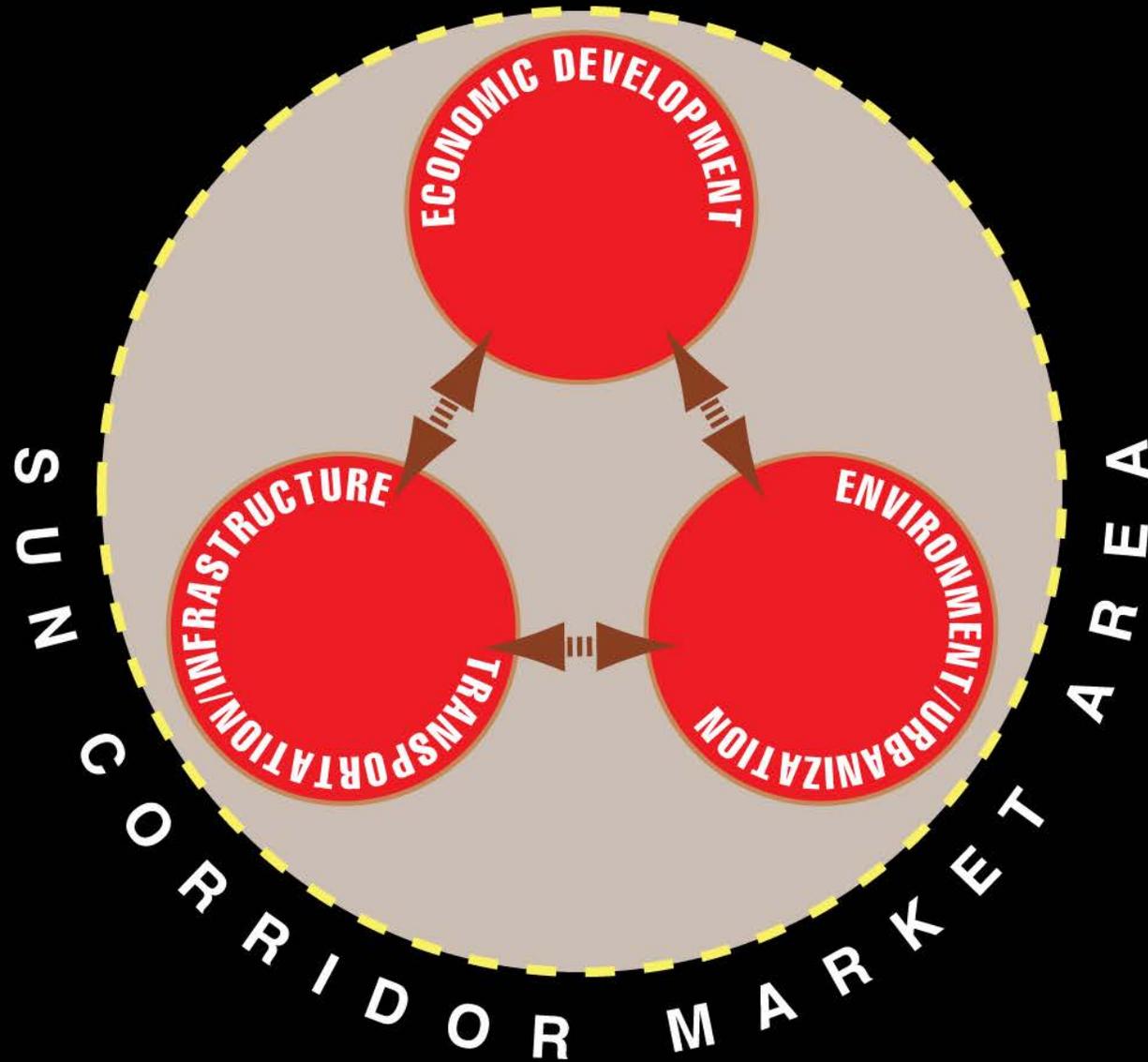
# Opportunities

Capitalize on Unique Environment,  
Preserve Key Assets

- A. **Urban Form:** Spatial & Infrastructure Efficiency
- B. **Assets:** Capitalize on Waterways & Open Space
- C. **Construction:** Green Building Products & Processes
- D. **Resources:** More Effective Use of Land & Water

Lead in Sustainable Development,  
Market Region as 'Green' Desert Metro

# Sun Corridor Global Strategy



# TRANSPORTATION

## Mode Specific Projects

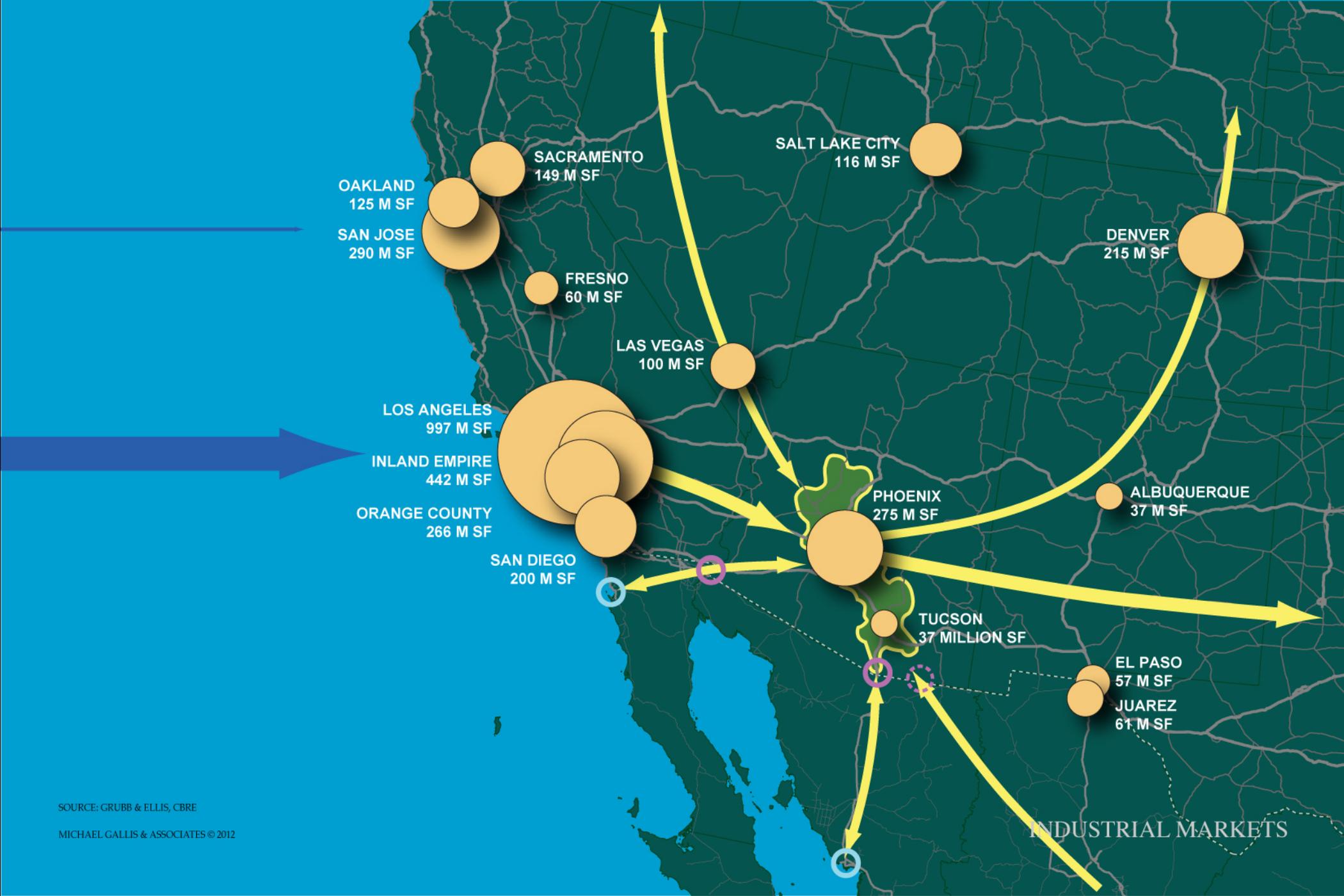
Improve Performance Individual Modes

Road • Rail • Air

## Integrated Multimodal Strategy

Competitive Advantage Over Other Regions

Phoenix-Mesa Gateway Airport



SOURCE: GRUBB & ELLIS, CBRE

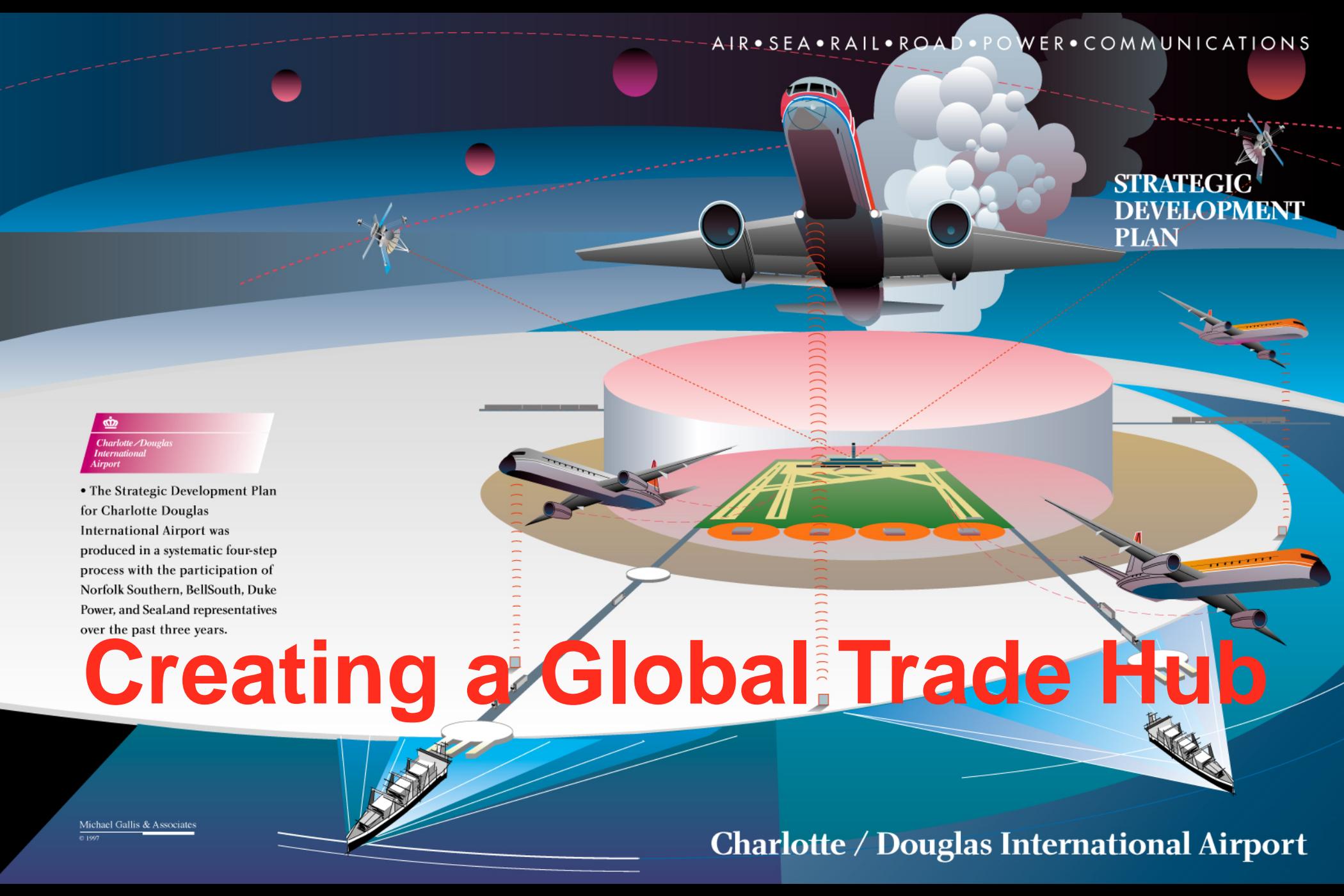
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**STRATEGIC  
DEVELOPMENT  
PLAN**

  
Charlotte / Douglas  
International  
Airport

• The Strategic Development Plan for Charlotte Douglas International Airport was produced in a systematic four-step process with the participation of Norfolk Southern, BellSouth, Duke Power, and SeaLand representatives over the past three years.

# Creating a Global Trade Hub



# RICKENBACKER

I N T E R N A T I O N A L  
A I R P O R T

## Franklin County Commissioners

Arlene Shoemaker  
Dewey R. Stokes  
Dorothy S. Teater

## Rickenbacker Port Authority

### Board of Directors

Charles J. Blum  
Miles Durfey  
James R. Fagan  
N. Victor Goodman  
Edward Jennings  
A. W. Maier  
Sharon A. McClellan  
Robert H. McNaghten  
James W. Rarey  
Greta Russell  
Jerome G. Solove

### Executive Director

Bruce E. Miller

### Project Manager

Jeff Clark

## Project Team

CH2M Hill  
Burgess & Niple, Ltd.  
Sypher: Mueller, Inc.  
Dr. Geoffrey D. Gosling  
Barr & Barr Communications  
Aviation Resource Partners, Inc.  
Michael Gallis & Associates

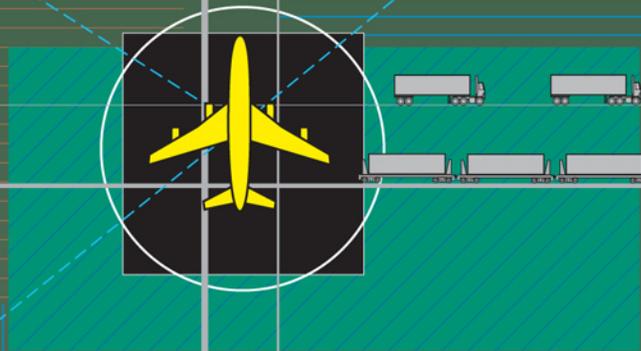
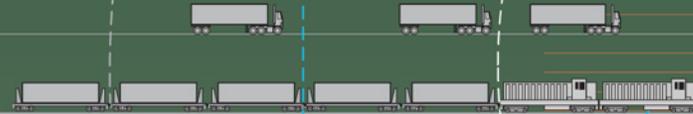
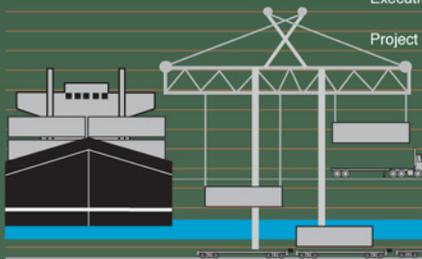
## Vision Document prepared by:

Michael Gallis & Associates  
Michael Gallis  
Todd Williams  
Larry McFall  
Erik Kreh  
David Stokes

## Edited by:

Betty Garrett, Garrett Enterprises

This **Vision Document** is a summation of The Long Range Development Concept Plan completed by the Project Team in 1996. This project has been funded with the assistance of the Ohio Department of Transportation and the Rickenbacker Port Authority.



# VISION FOR THE 21<sup>ST</sup> CENTURY



# THE U.S. NETWORK

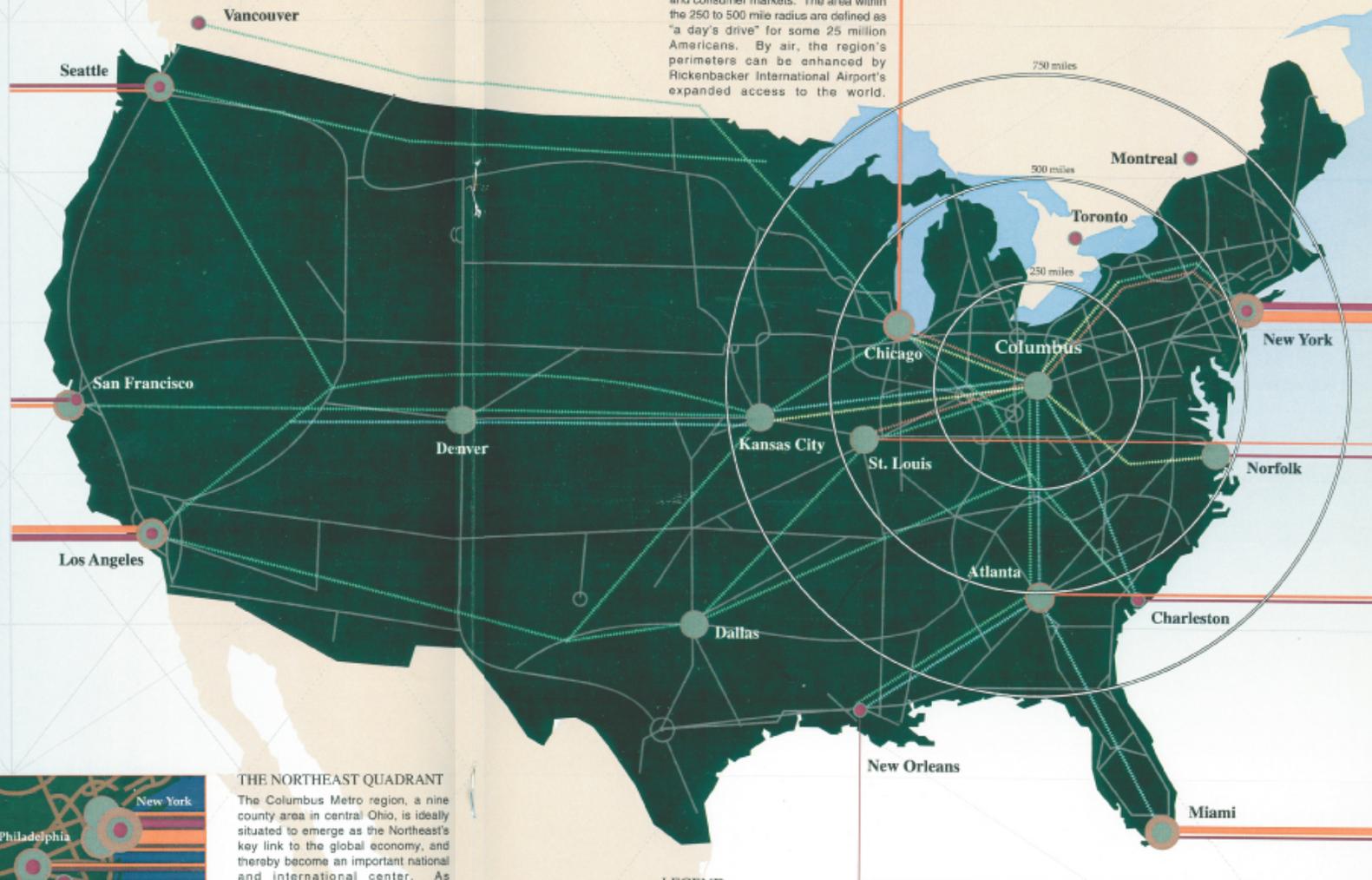
The major metropolitan centers in the U.S. are linked by a continuous transportation and communication pattern. Now, with the opening of the world economy, exciting possibilities have been fashioned for individual regions with the right qualifications to assume a far greater importance in world trade and transportation. Rickenbacker International Airport is in an enviable position to do just that.

The U.S. logistics network is the world's best national system of internal distribution and links to outside countries via air, road, rail and sea. Another vital attribute for America is its advanced communications operations. Traditionally, the majority of U.S. international trade passed through the port of New York. At present, though, technological advances in transportation and communication and the effects of globalization have led to a more decentralized and regional pattern in our global linkages. The U.S. is now connected to the world by seven primary regional centers: New York, Atlanta and Miami on the East coast; Chicago and Dallas in the Midwest; and Los Angeles, San Francisco and Seattle on the West coast.

In the central Ohio area, the Columbus Metro region is emerging as a major focal point in the United States transportation network. Columbus and central Ohio are located at the junction of both East-West and North-South interstate highways and the three major East coast rail lines which connect Atlantic and Pacific ports. Columbus is also at the forefront of America's fiber optic cable communications infrastructure. Most importantly for the region's future role, Rickenbacker International Airport already provides international air cargo service which can be expanded.

## ACCESS RADIUS

The Columbus/central Ohio region lies within a 500 mile radius of more than 50% of the U.S. population and 60% of all the country's manufacturing facilities and consumer markets. The area within the 250 to 500 mile radius are defined as "a day's drive" for some 25 million Americans. By air, the region's perimeters can be enhanced by Rickenbacker International Airport's expanded access to the world.



## THE NORTHEAST QUADRANT

The Columbus Metro region, a nine county area in central Ohio, is ideally situated to emerge as the Northeast's key link to the global economy, and thereby become an important national and international center. As transportation facilities in Chicago and several other major Northeast urban centers reach capacity, an unprecedented opportunity is opening up for Rickenbacker. Still able to expand its land envelope and integrate the region's air, rail, interstate highways and communication infrastructure at a single site, Rickenbacker can serve as a major hub for Midwestern and national markets.

## LEGEND

- Interstates
- Conrail
- Norfolk Southern
- CSX
- Other Carriers
- FAA Major Hubs
- Passenger Volume
- Port Cities
- Freight Volume

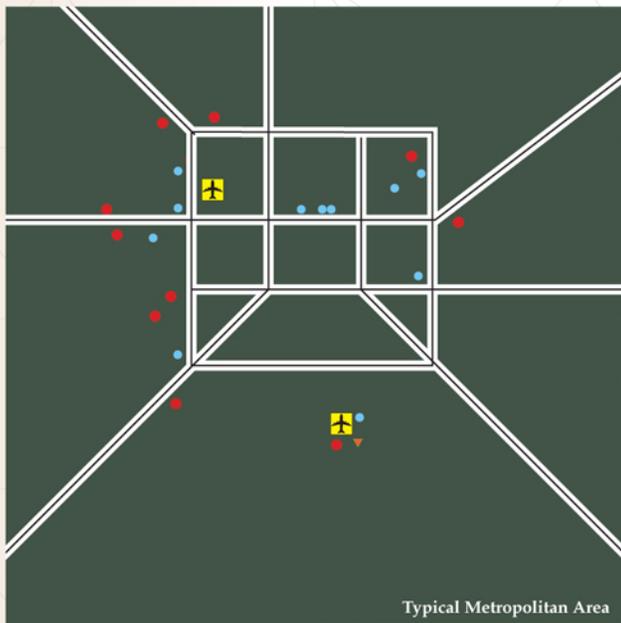
# MODAL INTEGRATION

Growth in global trade is creating the need to improve the efficiency of freight movements. Historically, transportation and communication systems developed and operated as separate and independent networks. Each of the systems had its own routing patterns and its own hubs which served as internal transfer points. Little attention was given to developing effectual measures to link

together the hubs of other systems within a given metropolitan area.

Modal integration provides the framework for improving efficiency in the overall transfer process by linking all means of transportation and communications at a single point. Integrating modal hubs eliminates the gaps between the transportation and communication systems

and significantly reduces the "friction" in the distribution and consolidation of freight. In sum, system unification simplifies the direct movement of materials, goods, people and information and lowers costs accordingly.



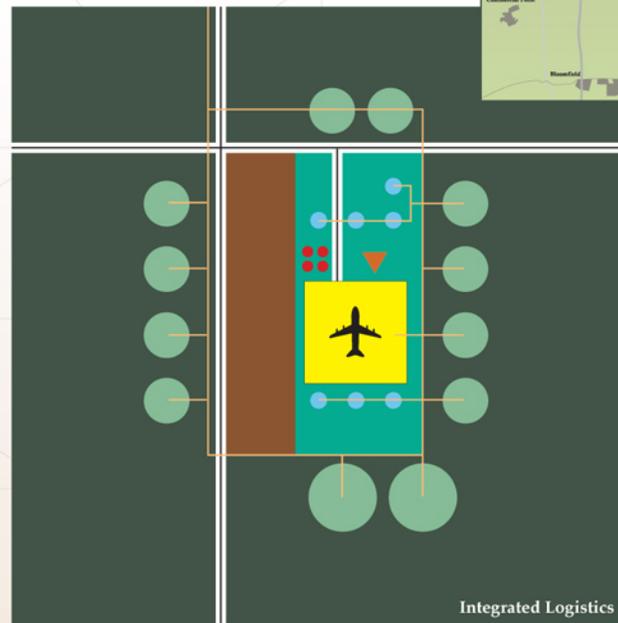
## Fragmented Transportation

Traditionally, transportation and communication systems developed their own national logistics network. Each facility was located within a given metropolitan area where it would have maximal use, and operated its own terminal as the focal point of separate and independent systems. Because terminal facilities are typically large land consumers, they were located on the edge of a city in proximity to the rail network or road system they used for service.

As cities continue to grow in size and population, though, many ports, terminals and stations once operated at the edges of urbanization now find themselves located deeply within the metro areas. Once scattered randomly across the landscape, they are now literally trapped in urban congestion. As a result, logistics currently functions in a random, fragmented pattern which has made the transfer of growing numbers of passengers and information less efficient and more costly than ever before.

## RICKENBACKER'S CONNECTION

Rickenbacker, already a functioning international airport with a FTZ designation, is extremely well positioned to provide a location for linking, consolidating and coordinating all existing transportation. It is adjacent to interstate highways, multiple rail lines and advanced telecommunications, considered a major asset of the Greater Columbus Inland Port. Rickenbacker is positioned to emerge as a fully integrated and technologically advanced multi-modal hub.



### LEGEND

- Interstates
- Rail
- Rail Yards
- Airport
- Freight Forwarders
- Truck Terminals
- US Customs
- Business Parks
- Power

### LEGEND

- Corridors
- Property
- City Limits

## Integrated Transportation

As the world-wide flow of goods accelerates, the need for improving efficiency of the transfer of people and freight between the four transportation modes in the U.S. is becoming critical. In addition, that physical momentum must be coordinated through the use of advanced telecommunications. By integrating the fragmented pattern of modal systems and creating the communications framework linking each point of transfer, overall efficiency can be coordinated.

These "integrated" hubs offer an infrastructurally rich environment which can be used to attract major business and industrial users. A set of business and industrial parks surrounding the core property for transport and communication could also provide users with direct access to any infrastructural option necessary on an uninterrupted 24 hours basis. This would help the infrastructure providers maximize their capital investments and operating expenses; at the same time, business park users would optimize their logistics cost, time and coordination factors.

# **ECONOMIC DEVELOPMENT**

## **Segment Specific Initiatives**

**Strengthen and Grow Selected Components**

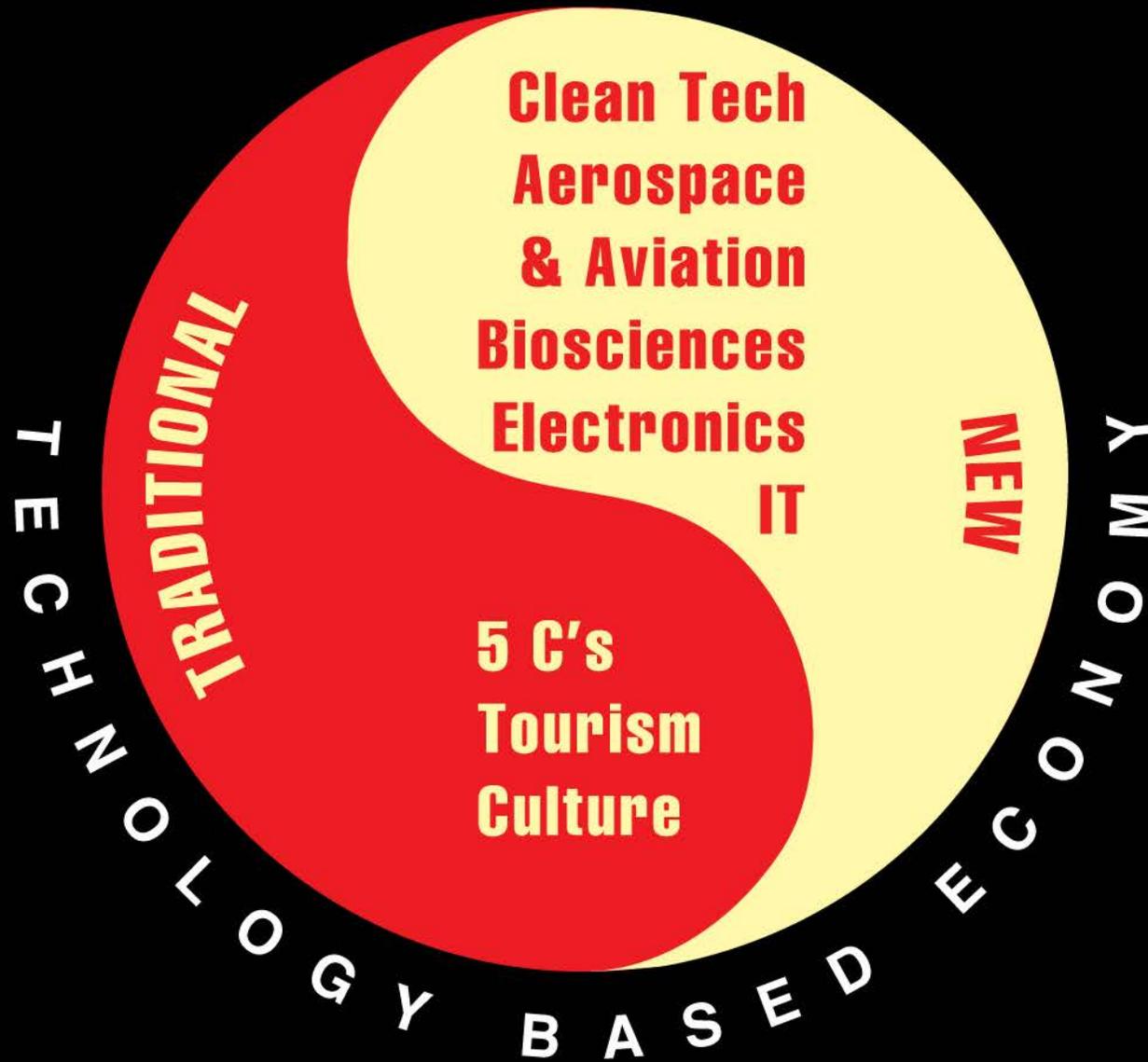
**Clean Tech • Aerospace • Bioscience • IT**

## **Complete the Transition**

**Comprehensive 21<sup>st</sup> Century Tech Economy**

**Universities • Research • Industry  
Engineering • Management • Finance**

# 21<sup>st</sup> Century Economy



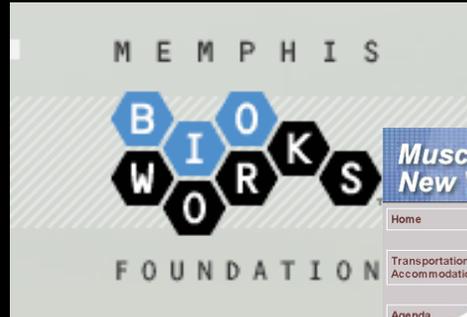
# Creating A Diverse Economy: from Distribution to Center for BIOMED & BIOLOGISTICS

## RECOMMENDATIONS

**Develop a collaborative medical council involving hospitals, medical schools, universities and the business community.** A medical council would increase synergy between the institutions, develop and support policy and increase investment to build the bio-med economy. It could address the need to significantly increase research dollars (doubling from \$50 to \$100 million at UTHSC), the commercialization of technology from medical research and advance the Medical School to become one of the top 25 schools in the country in terms of its faculty, research and funding.

**Define the regional biomedical mission.** The region must define its goals for the level, quality and synergy it wants its medical establishments to achieve. This will require new partnerships to be formed between the public, private and medical community. The Memphis region can become a world-class bio-medical health service center or remain a metropolitan service center. While the region contains an array of medical facilities, it often operates in a competitive and fragmented manner that limits the synergies necessary for the region to become a major bio-med economic center.

**Significantly strengthen the biomedical economic cluster.** Bio-med is emerging as a key component in the new economy. Regions that position themselves to participate in this growth sector will advance and attract new economic activity. The Memphis region has a good foundation upon which to build a bio-med industry. However, its various parts need to be strengthened to experience large-scale economic growth. The UTHSC in Memphis plans to emerge as a major research center.



## Musculoskeletal New Ventures Conference

October 6-7, 2004  
Memphis, Tennessee

Home
Transportation & Accommodations
Agenda
Registration
Speakers
Entrepreneur Presenters
Sponsors
Rockin' Reception
Maps

# MEMPHIS ROCKS THE BIOMED WORLD!

October 6-7 2004  
Memphis, TN

Mark your calendar and bookmark this page for the Musculoskeletal New Ventures Conference. The conference is designed to benefit entrepreneurs, the scientific community and venture capitalists active in the field of Musculoskeletal Disease treatment.



Bio-Links  
BioScience Community  
Economic Development

Leading the way  
>>>>>>

...a transition from the industrial age to the information age. Many of the opportunities for almost every American city and Memphis is no exception. Memphis is the bio-science industry... the city strikes a chord on four fronts: research & treatment of pediatric cancers, biologistics and vision



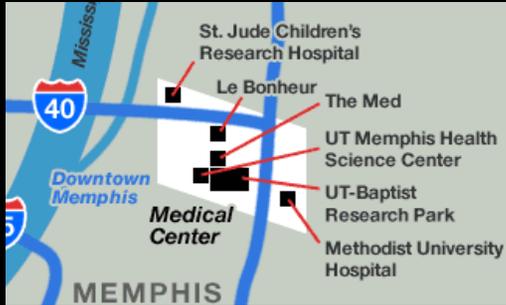
...second, and even third opinions are giving the Memphis orthopaedic community a big thumbs-up. We are part of a \$165 billion market that globally thanks to global demographics. Memphis is home to such medical equipment manufacturers as Medtronic Sofamor Danek, Wright Medical, GyruS ENT, and Tech Orthopedics, Inc. Memphis also has world-class facilities at the Medical Education Research Institute, University of Tennessee Health Science Center, The University of Memphis and Christian Brothers University and medical device communities anywhere. All the while, the physicians at the University of Tennessee Health Science Center's Murphree Clinic are constantly striving to create advanced procedures to improve the world of orthopaedic medicine. The Campbell Orthopaedic Institute, the main textbook used to train orthopaedic surgeons, is located in Memphis. The University of Tennessee Health Science Center's Murphree Neurologic and Spine Institute provides a major resource for the orthopaedic community. The Clinic, through its members, has made many contributions to the orthopaedic and neurological literature. From research & clinical development, to manufacturing, to distribution, the competitive advantage is in Memphis. The Memphis region is the center of the world in Orthopaedic Medical Device and Instrument manufacturing.

2 years after completing a strategic framework:

- Creation of Bioworks Foundation
- 1/3 of New Economic Growth in Biomed
- \$300 Million in New Investment
- \$20 Million Venture Fund
- 2,000 New High-Paying Jobs

**Biologistics** (pronounced bio-log-istics) is what you get when you fuse logistics with BioScience and whaddya got? Biologistics, a term recently coined to describe the time critical movement of medical devices, pharmaceuticals, research supplies, and medical equipment. Memphis has more than 89,000 people (21% of the workforce) employed in logistics & distribution-related industries and more than 130 million square feet of distribution space. Memphis ranks #1 as the world's top cargo airport, a strategic advantage for biologistics. We boast ownership of the U.S. Bulk Center, U.P.S. and FedEx. When it comes to moving packages... that's what "North America's Logistics & Distribution Center" is all about.

# Continuing Economic Impact



## The UT/Baptist Research Park

The Memphis Bioworks Foundation is in the process of building the UT/Baptist Research Park, which will ultimately consist of 1.2 million square feet of laboratory space located in the heart of the Medical District.

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Memphis Biowor  
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Bioworks Regic  
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Housing resear  
tenants, the fir  
the UT/Baptist  
dedicated, six  
world-class bio  
The Research f  
incubation prog  
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creation of new  
integrate the m  
teaching and b



HOME  
THE FOUNDATION  
UT/BAPTIST RESEARCH PARK  
START-UP SUPPORT  
EMPLOYMENT/WORKFORCE  
EVENTS/NEWS  
CONTACT US

THE INVESTCO



The Tennessee Small Business Investment Company Credit Act was signed into law on July 9, 2008. The Act offers \$100 million in gross premiums tax credits to insurance companies that invest in companies certified by the State of Tennessee as "Innovators."

READ MORE

ENTREPRENEURS



Innova has the management, the financial resources, and the experience to transform your idea into a lucrative product or service.

READ MORE

TECHNOLOGY TRANSFER



Innova has close working relationships with many universities and research institutions in the southeast. Innova consistently exchanges information with the faculty at these institutions.

READ MORE

PORTFOLIO COMPANIES



READ MORE

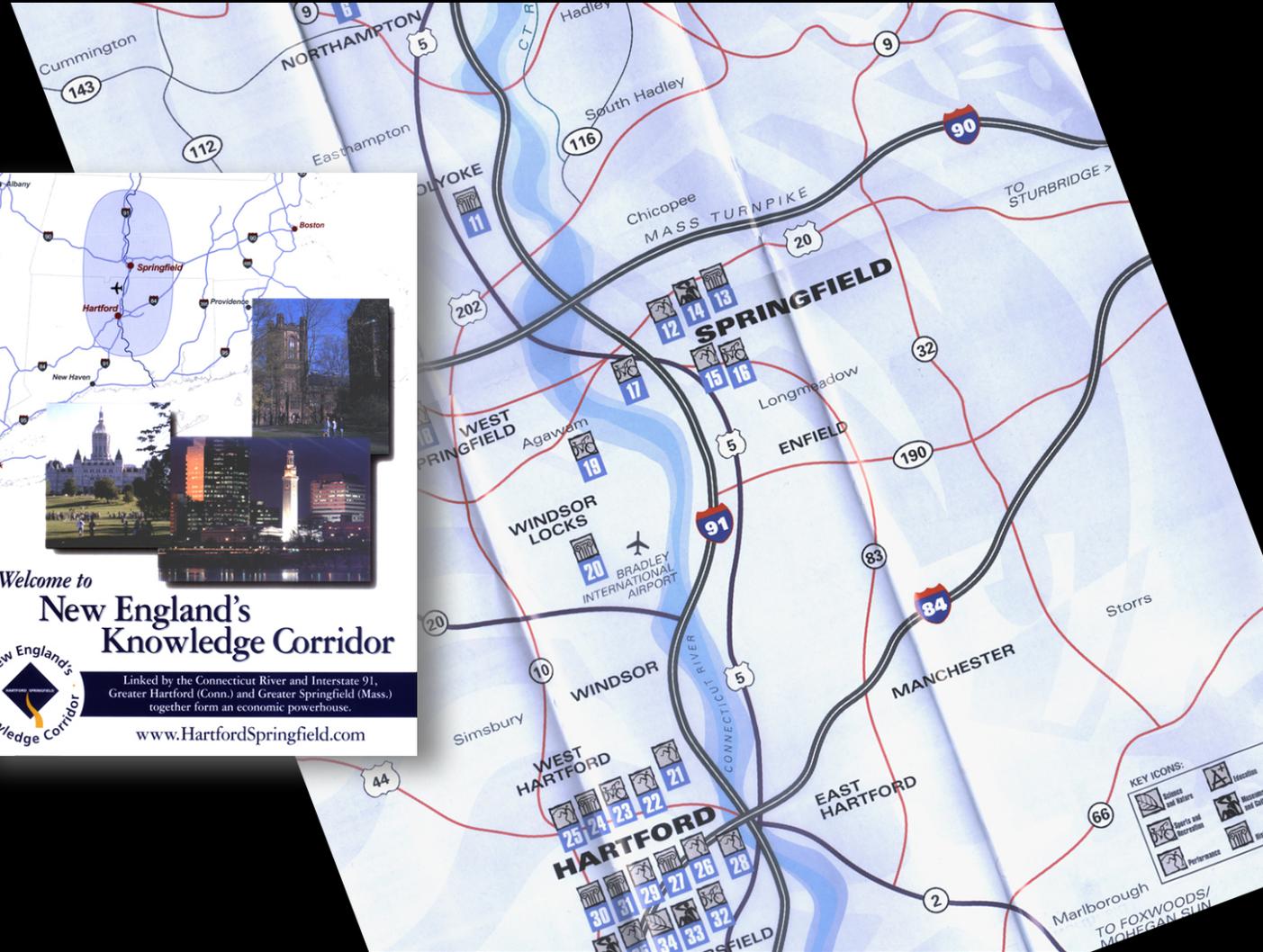
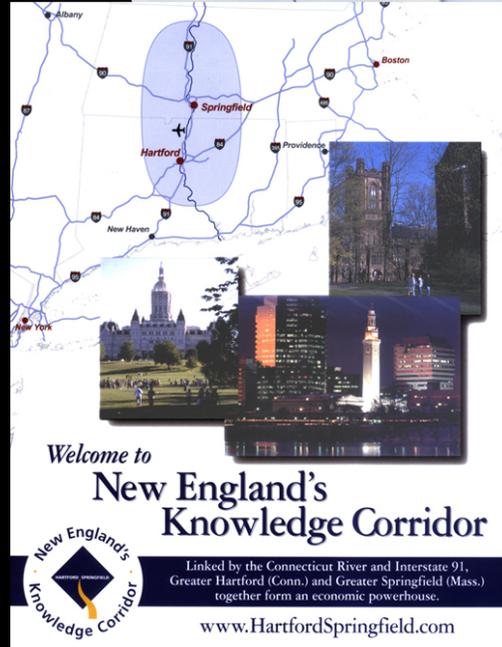
Investment in bio start-ups and commercialization of new products

Research park projected to:

- Create 5,000 bioscience jobs
- Support 4,000 non-bioscience positions
- Generate a \$2 Billion annual economic impact
- Bring \$1.6 to \$4.3 Billion in capital investment in 10 years
- Spur urban revitalization and community development



# New Perception / New Marketing Program



16 Economic Development Organizations Join to Cooperate  
New Strategies for Attracting Industry

# ENVIRONMENT/URBANIZATION

## City / County Initiatives

**Preserve Key Environmental Assets**

Rivers • Canals • Parks • Habitats • Corridors

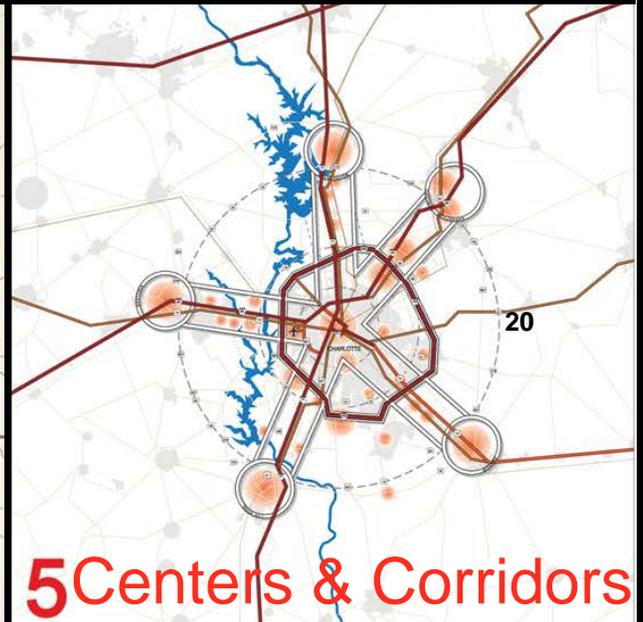
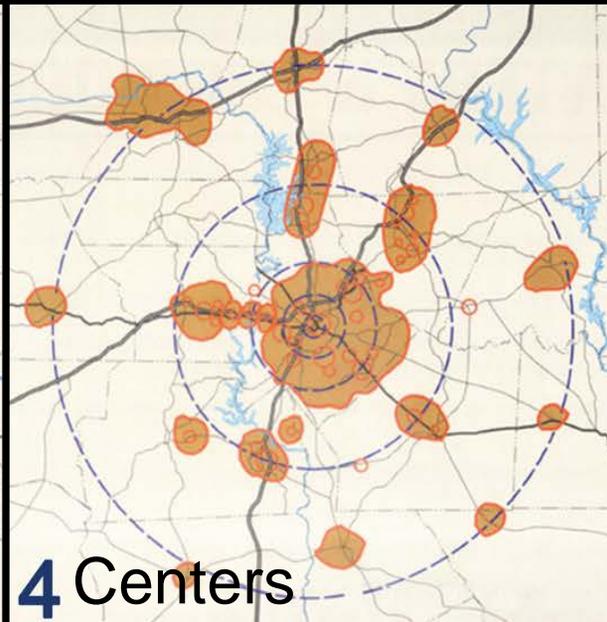
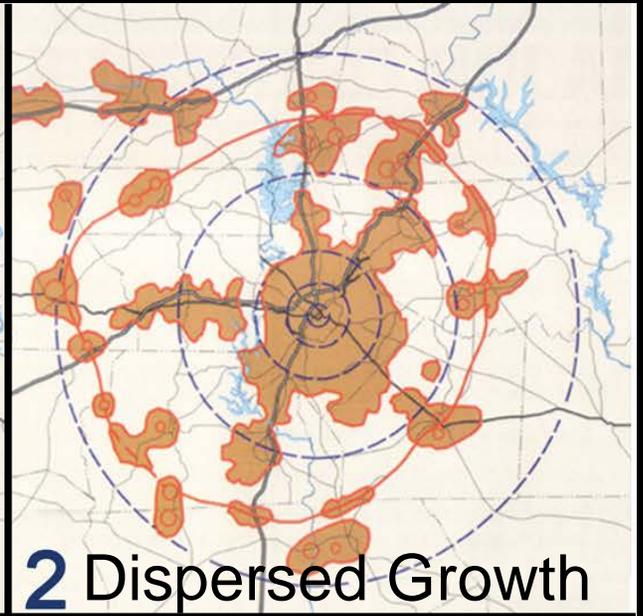
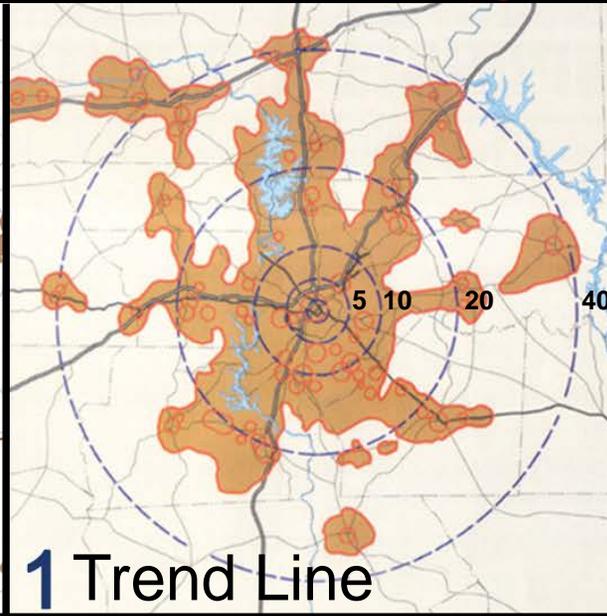
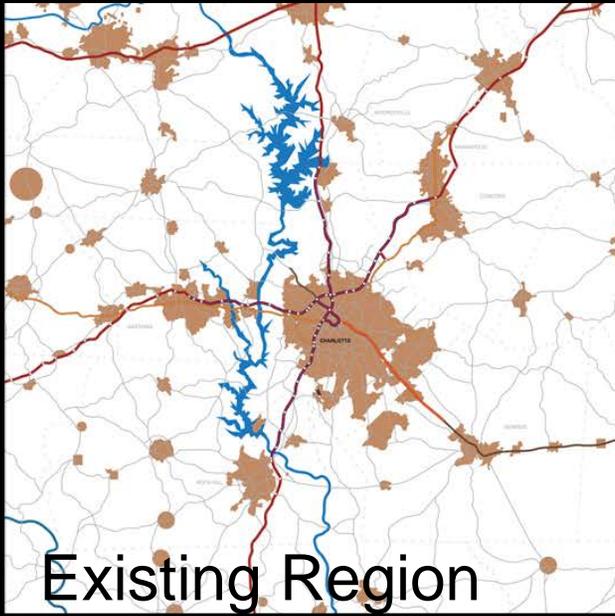
## 'Green' Desert Metro Region

**Weave Together Urban & Natural Systems**

Transportation • Urbanization • Economy

Environmental Patterns & Dynamics

# The Charlotte Region 1992



# **GLOBAL STRATEGY**

## **Mutually Reinforcing & Synergistic Big Opportunities**

- A. Global Trade & Transportation Hub**
- A. Transition to Technology Economy**
- A. “Green” Desert Metro Region**

**“Broad new conceptions which have gripped  
the imagination  
of the people may have more  
influence over the future development  
of the community than the completion of numerous  
specific projects.”**

**From Plan to Reality:**  
A Report of four years' progress  
on the regional development of  
New York and Its Environs.  
**1933.**

# The Competition:

**“TO BECOME THE WORLD CENTER OF FINANCE,  
TRADE, AND CULTURE IN THE 21<sup>st</sup> CENTURY”**

Mission Statement of Shanghai, China  
as reported by the secretary of transportation, Joseph Perkins,  
State of Alaska, following a recent visit to China June, 2001

***The 20th century is over.***

***Are we preparing for the  
21st century?***