

THE MARIPORT GROUP LTD.

REPRESENTATIVE PROJECTS IN PORT IMPACT ANALYSIS

Port of Toronto Impact Study

Assessed the various types and levels of economic, social and environmental impacts of the Port of Toronto on the City of Toronto, Metropolitan Toronto, the Greater Toronto Area, and the Province of Ontario. The study incorporated a 35-year analysis of traffic along with a detailed analysis of industry, employment, wages, revenues and tax base contributions. The analysis centered on four possible port development scenarios and their impacts on the city and region.

Bellingham Cruise Terminal Impact and Market Study

The study analyzed the economic impact of the Cruise Terminal on the Bellingham and Whatcom county economy. It focused on the direct and indirect impacts of the terminal itself, isolated from impacts of other developments occurring in the area. Current and future impacts were assessed relative to the GNP. The results enabled a development plan to be established for the port, and gauged the impact of various short to long-term development opportunities.

Ports Master Plan: Turks and Caicos Islands

The plan incorporated an analysis of the economic impact of investing in various port facilities and simple, efficient marine transport operations throughout the country. The resulting impacts on cargo damage and food spoilage, along with reductions in air and ocean freight costs were investigated. The results were incorporated into a master development plan for the country's port system.

Detroit Intermodal Terminal

Evaluated the economic impact of investment in an intermodal terminal facility in Detroit. The impact on the local and state labour force, purchases and the city's tax base were assessed to determine the most effective development scenario. Included was a financial analysis of terminal operations, assuming various funding arrangements, and future impact of the terminal on the labour force and tax base.

Beauport Flats Development Study

Assessed the impact of potential transshipment opportunities at the Beauport Flats under various development scenes and resulting traffic levels. Included were an assessment of potential cargo throughput, and the economic impact of subsequent terminal developments on the local economy and employment levels.

Strategic Development Plan, Port aux Basque (NL)

As part of a wide-ranging evaluation of port development, evaluated the economic impact of specific short and medium term options.

St. Joseph River Action Plan

As part of a commercial evaluation of the port and its future, assessed the economic benefits of development options to aid the county in determining direction of the port.

Economic Evaluation of Port Sites¹

For Tropical Shipping, evaluated several port sites in Great Exuma. The evaluation helped identify the port site that was best able to overcome the deficiencies of the current location in Georgetown.

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EXPERTISE IN PORT IMPACT ANALYSIS

The Mariport Group has extensive and unique experience in all aspects of port development and planning embodying a practical knowledge of shipping, transportation, and port operations for providing effective port impact analysis. We can provide an independent service tailored to the client's requirements and the specifics of the region.

Mariport can evaluate the position of a port relative to the economic, transportation or environmental impact on its hinterland. Such evaluations can be undertaken at various levels of port activity to demonstrate the overall benefit of the port to the region. Such evaluation takes into account shipping services, the location of the port relative to trades routes, and the opportunities for it to attract new business in competition with alternative routes and port facilities.

Port impact analysis comprises the assessment and quantification of various elements of port development and shipping. When gauging the impact of any development or investment scheme, the following should be considered:

- The level and scope of employment opportunities provided
- The technical sophistication of job requirements and the availability of qualified labour
- Training and education opportunities for local populations
- The level of wages and social program costs
- Level of direct spending (purchases) in the local and regional economy, including both manufactured goods as well as services
- The identification and attribution of spending to port and terminal operations, including vessel operations, versus other complementary industries
- Impact of construction wages, employment and spending (short term) versus port and terminal operations (long term)
- The scope and sustainability of spending, both locally and regionally
- The impact on the physical environment
- Impact on local, regional and national tax bases
- Level and type of funding available, and the impact of its requirements on the port and local economy.

Port economic impact analysis includes both the strategic and operational impact of development as well as the quantification of the economic impacts. Hence, emphasis is placed on levels of direct and indirect (quantifiable) spending and investment, versus induced spending which requires the use of economic multipliers, and their inherent deficiencies.

Accurate and effective port impact analysis is necessary for the implementation of any port development scheme. A thorough port impact analysis will provide for optimal investment in port and harbour facilities as well as establishing a framework for current and future development strategies.