

June 3, 2009

North American Corridors and Gateways – Panel 4



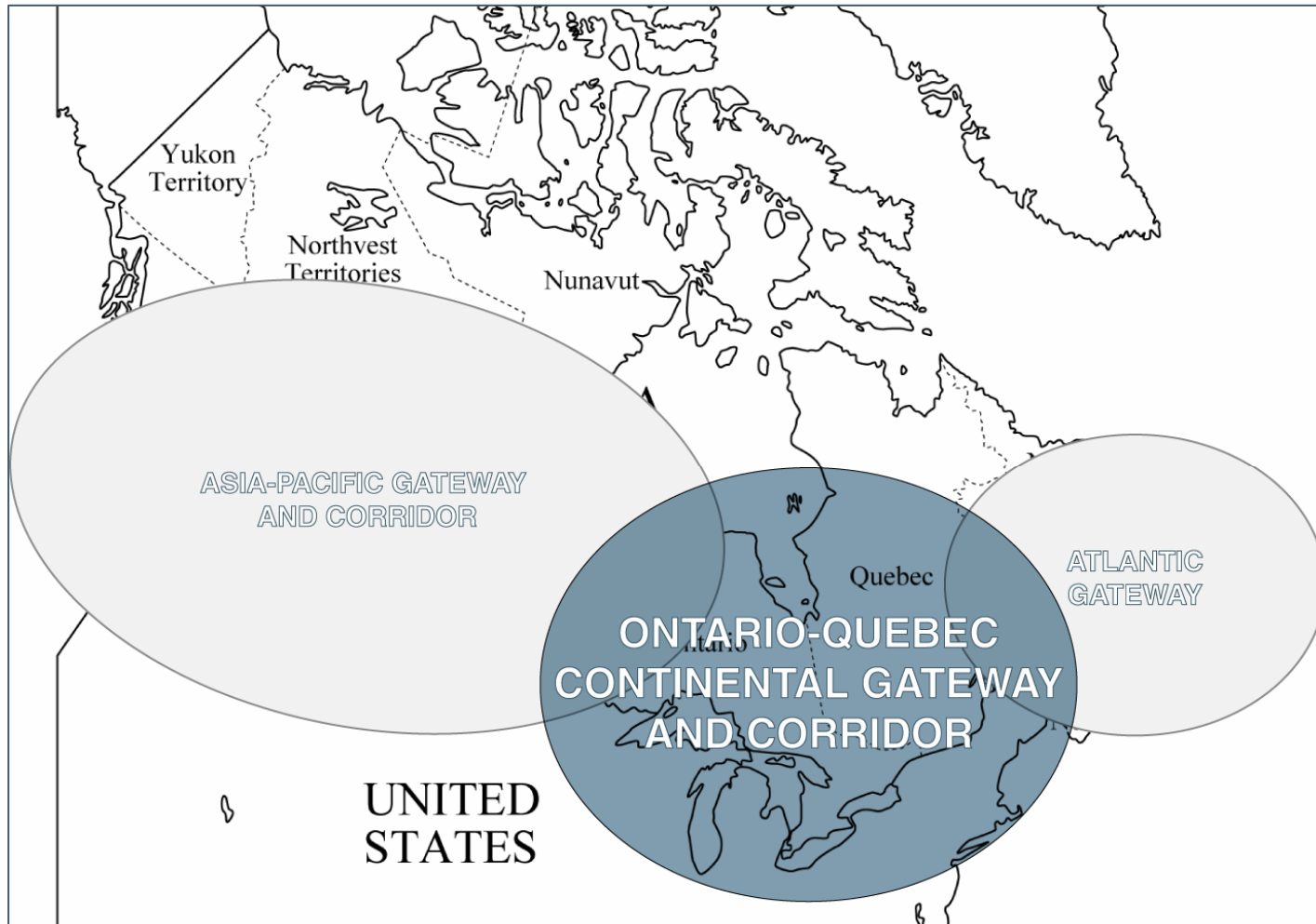
Outline

- Background: Gateway initiatives in Canada;
- Continental Gateway:
 - Vision/ Objectives;
 - Governance structure/ alignment with private sector initiatives;
- Involvement of private sector:
 - St. Lawrence Great Lakes Trade Gateway;
- Status/ Next steps;
- Desired results;
- Challenges.

BACKGROUND:

- Pacific Gateway;
- Forum Maritime: St. Lawrence Great Lakes Trade Gateway;
- Fédérations des chambres de commerce du Québec gateways;
- Southern Ontario Trade Gateway;
- Continental Gateway.

Background: Continental Gateway



Vision and Objectives

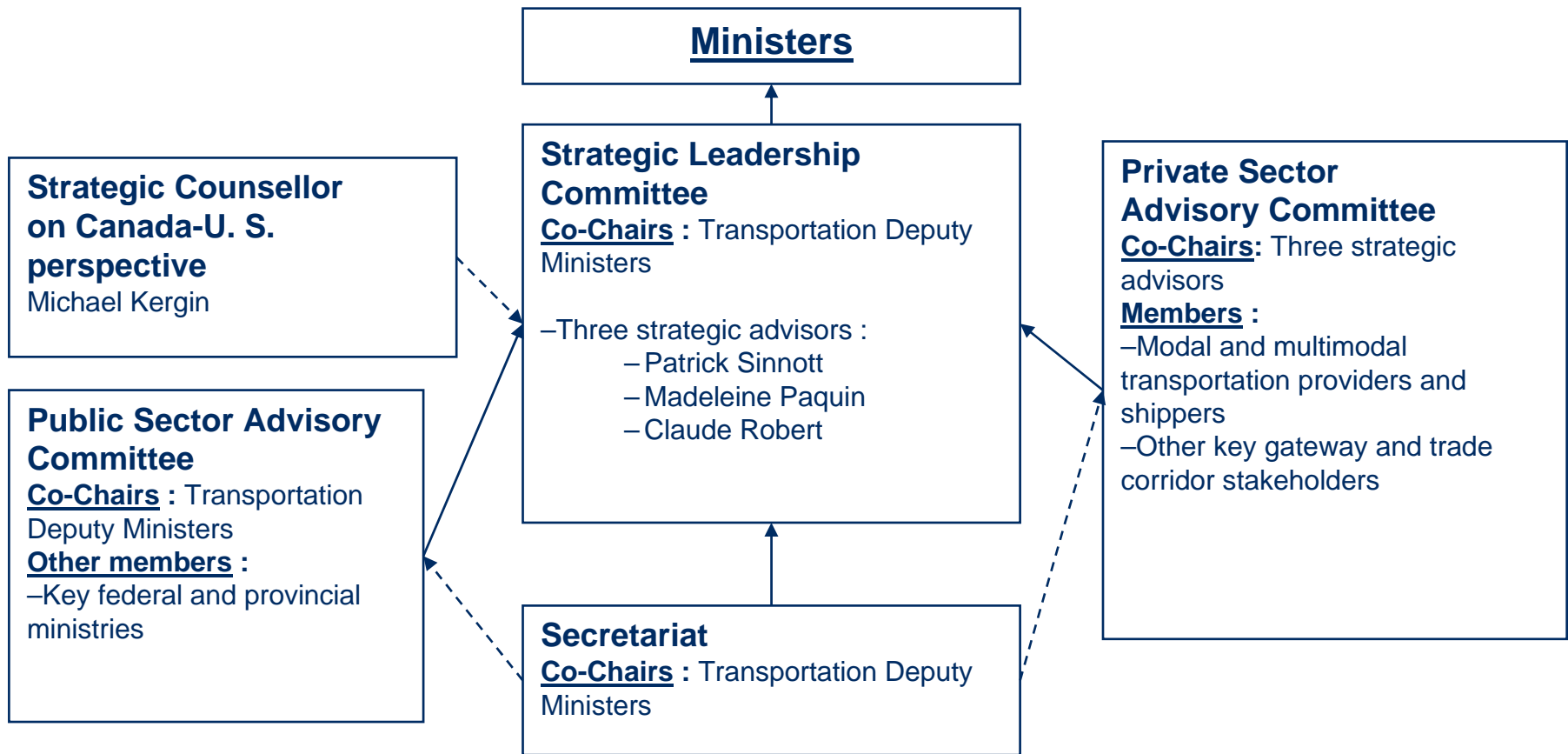
Vision:

“The Ontario-Quebec Continental Gateway and Trade Corridor: an efficient, secure and sustainable transportation system that drives our international competitiveness by seamlessly connecting markets in North America and to the world.”

Objectives:

- Integrate the transportation system;
- Relieve congestion and improve capacity;
- Enhance the efficiency and reliability of the system;
- Minimize the environmental footprint and manage growth;
- Secure and safe trade and travel;
- Transform the transportation system to embrace the future.

Continental Gateway – Structure



St. Lawrence Great Lakes Trade Gateway

Highlights:

- Objective was to get **industry perspective** on future cargo flows, as well as key challenges and, above all, achieve **consensus** as an integrated industry on priority actions with respect to infrastructure and non-infrastructure;
- Participation from most senior executives ensured credibility, inclusivity and transparency;
- Huge representation from industry: all modes and many customers;
- Study based on user (customers and service providers) input by cargo group: containers, dry and liquid bulk, general cargo.

St. Lawrence Great Lakes Trade Gateway

Methodology:

- Established four cargo groups: container, dry bulk, liquid bulk and general cargo;
- Each group was chaired by a respected industry leader and included shippers and service providers from all modes;
- Groups were inclusive;
- Study coordinated by consultant:
 - Demand forecasting;
 - Bottlenecks and capacity constraints noted;
 - Competition evaluated and alternatives established;
 - Recommendations made to Leadership Council, and then to Continental Gateway Council.

St. Lawrence Great Lakes Trade Gateway

- Port capacity;
- Optimisation of navigation channel and Seaway;
- Port access and hinterland connection, principally dealing with road and rail infrastructures;
- Policies and regulations.

Continental Gateway: Status/ Next Steps

- List of potential high-level actions has been drafted, both infrastructure and non-infrastructure:
 - Initiatives classified as Short, Medium and/or Long-Term;
 - Some initiatives already started; others need to be prioritized, with those selected executed;
 - Partnerships to be established (Transport – federal/provincial, other public sector, private sector);
 - Framework for private sector has been introduced;
- Execution of Action Plan.

Desired Results

- Deal with bottlenecks and commit to strategic infrastructure investments;
- Reduce regulatory bottlenecks and harmonize policies and regulations;
- Introduce technology and innovation to improve transportation system efficiency and sustainability.

Challenges

- **Deliver concrete results:**
 - We have created expectations by inviting the private sector –we need to deliver results;
- **As the world continues to change, our research and knowledge must also evolve:**
 - Need to develop a mechanism to capture changes on a regular basis;
- **Match political agenda.**