

# Seaport Statewide Strategic Visioning and Planning Process Summary of Workshop and Online Survey Results

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## SURVEY PURPOSE

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This survey was designed by the facilitators to solicit input on an initial draft set of key issues and questions that will need to be addressed from the perspective of Florida seaport stakeholders during the Seaport Statewide Strategic Visioning and Planning Process. This planning process was initiated at the June, 2006 meetings of the Florida Ports Financing Commission, the Florida Ports Council and the Florida Seaport Transportation and Economic Development Council in response to a recently released May, 2006 Florida Seaports: Conditions, Competitiveness, and Statewide Policies, Draft Final Report (PDF) prepared by Cambridge Systematics, Inc. for the Florida Department of Transportation.

The overall purpose of this process is to create, through collaboration with transportation partners, an umbrella strategic state and regional Florida seaports' vision and plan that is based on, responds to and reflects the demands of the Florida Seaport business model. The following is a compilation, without attribution, of responses received on-line and at the four regional seaport workshops. A summary version of the responses will be used to guide discussion at the rescheduled Port Directors' executive session in Miami on September 26, 2006.

### **Respondents (58 total):**

*Notes:* Respondents may have picked more than one region, but they are counted only once in the averages and totals for all. Some may not have been given all the questions and some may have not answered all the questions, so total number answered for some questions may be less than 58. Unanswered questions are not included in the averages.

West Coast and Panhandle: Robert Armstrong, Manatee County Port Authority; Stan Canal FDOT District 1; Raymond Clark, FDOT District 7; Randy Feldbruegge, Intertek Calab Brett; Brian Giuliani, Del Monte Fresh Produce; Joe Gontarski, Manatee Port Authority; Ram Kancharla, Tampa Port Authority; Mike Maholtz, Sarasota Manatee MPO; David McDonald, Port Manatee; Walt Miller Port of St. Petersburg; Doug Montgomery, Mosaic; Rasmus H. Okland, PMFT; Tom Pitts, Port St. Joe; Edward W. Pollock CSX Transportation; Joan Sanchez-Schnettler, J.D. Sanchez Consulting, Inc.; Wayne Stubbs, Panama City Port Authority; Scott Taylor, CTL Distribution; Steve Tyndal, Port Manatee; and, Michael Williamson, Cambridge Systematics, Inc.

Southeast: Phillip C. Allen, Broward County Port Everglades; David Anderton, Strategic Planning Manager Port Everglades; John Balestro, POMTOC; Robert Barcelo, Hanjin Shipping Co. Ltd.; Phil Bates, Sea Star Line LLC.; Mark Baker, APM Terminals; Bruce Brecheisen, Seaboard Marine; Andrea Chao, FDOT; R. Everson, Atlantic & Pacific Maritime Services, Inc.; Randy Feldbruegge, Intertek Calab Brett; Jean Fitzgerald, J. Fitzgerald and Associates, Inc.; Brian Giuliani, Del Monte Fresh Produce; Judi Jarvis, Sea Escape Crusies (PEV); Margaret Kempel, Port Everglades Association; Girish Kumar, HNTB Corporation; David W Mock, CH2MHill; John Mullins, Coastal Maritime Stevedoring, LLC; Charles Murdock, American Merchant Marine Officer; Edward W.

Pollock, CSX Transportation; Bruno E. Ramos, BEA Int'l; Jorge P. Rovirosa, Florida Stevedoring Inc.; Samy Saitin, Holland America Line; Khalid A. Salahuddin, Port of Miami; Joan Sanchez-Schnettler, J.D. Sanchez Consulting, Inc.; Charles A. Schwarz Jr., Ecuadorian Line Inc.; Carlos L. Valoes, Trade and Transportation Council; Eduardo Verdayes, Support Trucking Group; and, Michael Williamson, Cambridge Systematics, Inc.

*Northeast and Central Coast:* Douglas M. Anderson, Port of Fort Pierce; Phil Bates, Sea Star Line LLC; Denise Burneetoz, First Coast MPO; Jon Brazee, Canaveral Port Authority; Randy Feldbruegge, Intertek Calab Brett; Robert Giangrisostoni, Port Canaveral; David Kaufman, Jaxport; Chris Kauffmann, Jaxport; Dennis Kelly, TRAPAC, Inc.; Margo Mochring, Jacksonville Planning and Development; Randy McMaster, ICS Logistics; Stan Payne, Canaveral Port Authority; Edward W. Pollock, CSX Transportation; Roy Schleicher, Jaxport; Charles A. Schwarz Jr., Ecuadorian Line Inc.; Val Schwec, The Port of Fernandina; Jeff Sheffield, First Coast MPO; David Stubbs, Jacksonville Port Authority; and, Michael Williamson, Cambridge Systematics, Inc.

# Global, Statewide and Regional Trends, Headwinds and Tailwinds

## Global Trends

*In the space below list any additional global trends affecting Florida's seaports that need to be considered.*

**e.g.**

- Increasing competition on the global stage
- Vessels continue to get larger and deeper

## *Survey Responses:*

### West Coast and Panhandle

- From a cruise perspective, more cruise ports closer to varied markets
- Shifting trade routes: impact of all-water shipments through the Suez Canal or the Panama Canal
- Anticipated expansion of the Panama Canal (subject to a referendum later in the year)
- Continuing imbalance between imports and exports
- Fuel costs
- Shortages of materials as other nations pursue their own development opportunities
- U.S. construction and manufacturing industry relying heavily on imported commodities, placing heavy demand on ports for service.
- Panama Canal expansion
- Vessel size - cargo and cruise
- Expanding free trade area - increased trade opportunities
- West coast congestion and cost - opportunities for FL ports
- Increased cost of rail and road transportation - one factor - benefit - short sea shipping; Mexico service; and direct service from main global trade lanes
- Expansion of Asia and SA/LA trade
- Significant investment in regional load centers/hub ports - increased opportunities for larger vessel / feeder services
- Inability of port infrastructure to keep up with continued global trade expansion
- Normalized US/Cuba relations and trade
- Increased competition regionally (US) and globally
- Actually both of the above are significant concerns. With average channel and berth drafts of 40 feet, and the time required to obtain permitting, design, a contractor and funding, it will be difficult to modify and deepen channels and berths to accommodate larger vessels in the next 3-5 years. Additionally, the ability to accommodate the amount of containers being imported over the next decade will be difficult to adjust to with current funding capabilities.
- Increasing foreign competition especially in the manufacturing sector.
- Lower port fees and other usage fees in Russia & China
- Movement towards Panamax-sized vessels

### Southeast

- Increase in trade with Far East
- Impact of DR CAFTA & FTAA
- Impact of a Free Cuba
- Port Access

- Larger Vessels, increase in capacity and container volumes
- Better road access
- Separate trucks from cars
- Reduced funding for seaport work by COE for harbor maintenance and expansion.
- Lack of spending of Harbor Maintenance Trust Funding.
- Environmental limitations on growth of Ports.
- Limited funding for Federal transportation for linkages (road & rail)

Northeast and Central Coast

- Greater security demands
- Highway congestion
- Harbor Dredging for larger vessels.
- Security.

**State and Regional Trends**

*In the space below list any state and regional trends affecting Florida's seaports that need to be considered.*

**e.g.**

- Strained financial resources for infrastructure investment
- Increasing policy focus on regional strategies for action

***Survey Responses:***

West Coast and Panhandle

- Increasing cost of materials
- Labor shortages
- Local focus of many elected officials
- Lack of understanding by some public and private sector interests as to what seaports do, why they are important, and why we should invest in them
- Burgeoning population is creating overcrowded roads, obstructing port access and freight movement.
- Land use compatibility; availability and growth management concerns
- More distribution centers located in the State
- Security regulations burden and expense
- Increased dependence on ports to support (related cargo movement) the construction and expansion of state infrastructure - roadway, housing etc.
- Economic and population growth - burden on ports
- Primarily funding for capital infrastructure necessary to meet the ever expanding needs of our customers. Additionally, security capital and operating costs continue to erode the available net assets available for expansion and maintenance of existing facilities. Finally, construction material costs have risen dramatically over the past 2-3 years, often increasing the cost of similar size facilities by 50-75%.
- Restrictive trucking policies impacting cost-to-serve for manufacturers
- Captive to CSXT to service the Tampa port (impacts both cost & service)

### Southeast

- Increased costs for additional state mandated security (sec. 311.12) over and above Federal security requirements (MTSA) making Florida ports less competitive over other states.
- Diversion of state funds normally utilized for port infrastructure improvements going towards defraying security related expenses being incurred by Florida Ports
- Cost of security
- Berth & land area limitations
- Draft limitations
- Transportation linkage limitations and growing congestion.
- Funding limitations with escalating costs.
- Environmental restrictions.
- Political congestion.
- Hurricanes.
- Impact of competitive seaports outside the state of Florida.
- Transportation infrastructure condition.
- Are we duplicating services among Florida Ports?
- Escalating capital and operational security costs
- Market diversification
- Traffic congestion on the roadways continues to get worse
- overall growth pressures
- the impact of the growing cruise market
- global markets that affect the cruise business

### Northeast and Central Coast

- Strained financial resources for infrastructure investment.
- regional strategies without funding mechanisms
- State run ports of Ga, S. Car, N. Car provide large incentives and capital dollars to attract and retain tenants/users; Fla. ports receive little support by comparison. Particularly difficult on North Fla. ports.
- Agree with the examples above. Florida needs to be more aggressive in recruiting industry that can locate near ports to further drive international trade, particularly exports.

### **Statewide Tailwinds (Opportunities aiding Florida's seaports)**

*In the space below list any statewide opportunities aiding Florida's seaports that need to be considered.*

**e.g.**

- All ports need to work together statewide to sustain the economic engine
- Growing recognition statewide of importance of seaports for the state's economy

### ***Survey Responses:***

#### West Coast and Panhandle

- Growing local populations increase the need for consumer goods and construction materials imported from various markets -- domestic and international
- Strong demand for port services of all kinds (containerized cargo, breakbulk cargo, bulk cargo)

- Seaports investment - reduces impact on highways and congestion
- Seaports investment - helps importers/exporters and consumers
- Population and consumption growth
- Ports, working together through the Florida Ports Council, provide an opportunity to organize strategies for international, national, and state-wide commerce. It also provides an invaluable opportunity to reach our state leaders and develop the recognition of the impact that our seaports have, not only in local and regional economies but on the national level as well. Port infrastructure funding through joint FPC and FDOT bonds and loan programs are, we believe, a distinct and measurable by-product of this recognition.
- Increase the number of deep water ports
- Engage the rail and truck industry to improve infrastructure to efficiently and effectively pull products through the port

### Southeast

- Communications plan for taking to the media.
- The importance of NAFTA and other trade agreements
- Florida's number one Industry is International Trade/Commerce. The state has an import/export culture, yet not very well recognized by its citizens who should be very supportive.
- Must take advantage of the states SIS which is more than a step ahead of other states. This is an excellent program to gain additional funding for major improvements to transportation corridors of vital importance to seaports and consequently international trade.
- FL ports need to continue distinct funding mode via FSTED for Ports.
- FDOT needs to continue & expand funding for port linkages to transp. net.
- FDEP needs to recognize need for ports to keep up with FL growth and provide rapid permit response.
- FL legislature needs to support port ability to exist in the urban setting and facilitate ability to grow.

### Northeast and Central Coast

- All ports need to work together statewide to sustain the economic engine.
- Lack of state funding will hinder development of ports-even most financially successful ports will find it difficult to fund major improvements
- Additional distribution follows growth and directly impacts ports when diversification of goods increases, ie. Asian carriers.
- Florida's proximity to Latin America and the Caribbean is an asset that very few can match. Florida needs to take advantage of it's geography.

### **Regional Tailwinds (Opportunities aiding Florida's seaports)**

*In the space below list any regional opportunities aiding Florida's seaports that need to be considered.*

**e.g.**

- Public and private sector attitudes regarding ports and their role
- Opportunities through transit projects to get funding that can help pay for rail and other infrastructure improvement for freight rail.

## *Survey Responses:*

### West Coast and Panhandle

- Container trade is growing in Tampa and Panama City. Emerging bio energy industry has interest in utilizing Florida's Gulf Ports.
- Reliability of port systems - following a major hurricane
- Alternate strategic regional facilities (petroleum storage yard - inland)
- Our Port has benefitted greatly from the support of the local community, which encourages public/private partnerships. We have worked with our customers as a team to develop strategic solutions to meet their market driven demands. Often times these opportunities have a limited window of opportunity. Our Economic Development Council, Chamber of Commerce and local Board of County Commissioners have developed a working alliance that expedites the permitting and planning process resulting in much faster design/permit phase.
- Fund additional truck access
- Address the ever-increasing cost of port security

### Southeast

- the designation of the Atlantic Commerce Corridor
- better planning and thinking regionally
- the use of technology to increase throughput
- the important of focusing and planning on intermodal projects
- Implementation of SIS (corridors of commercial significance) for federal/state funding.
- Opportunities for inland port development.
- Opportunities through FDOT for SIS and State Construction Program funding for connector improvements.
- State opportunities to improve rail infrastructure and coordinated improvement to FEC and CSX.

### Northeast and Central Coast

- Rail impacts some ports but not others-funding solutions should not depend on tortured manipulations to find funding sources.
- FDOT project to create rail switch yard in North Jax. to alleviate trucks crossing city.

### **Statewide Headwinds (Challenges potentially hindering Florida's seaports)**

*In the space below list any statewide challenges potentially hindering Florida's seaports that need to be considered.*

**e.g.**

- Unfunded security regulations on the cruise and cargo side.
- Insurance cost is a growing challenge/problem.

## *Survey Responses:*

### West Coast and Panhandle

- Traffic congestion
- Land constraints impeding expansion
- Competing uses for waterfront land
- Shortages and escalating costs of materials and labor
- Hurricanes and other emergencies
- Security Costs are higher than necessary. New insurance rates will impact the Ports' operating results.
- Sufficient land to accommodate growth in cargo
- Truck route system - ability to protect the system from growth
- Increased cost of infrastructure - challenge and problem
- Ability to create deeper and wider channels
- Alternate home ports for cruise ships in the Caribbean and worldwide
- Operating cost of all types continually strain the available resources that can be used for expansion and to maintain a competitive edge. Interest costs, general liability and health insurance, electric and fuel have outpaced the composite inflation rate. As most budgets have been contained over the past few years the options for a balanced budget can be limited to revenue expansion. However, without the ability to expand infrastructure, assuming the Port is operating near capacity, this option is contained also. As previously mentioned, annual security operating costs of personnel, training, and procedural changes necessary to meet the consistently changing security regulations consume a larger share of the operating budget.
- High inbound and outbound rail rates to service the port
- Ever-increasing costs to utilize Florida ports
- Ever-increasing regulatory pressures

### Southeast

- Traffic congestion
- Land constraints impeding expansion
- Competing uses for waterfront land
- Shortages and escalating costs of materials and labor
- Hurricanes and other emergencies
- Hub to hub connections not recognized by FDOT SIS
- the importance of transit
- 311.12 which mandates an additional (duplication) and unnecessary extra level of security over and above the federal standards mandated by the US Congress under the MTSA adding additional costs to cargo and cruise operators, resulting in an uncompetitive disadvantage over other competing states.
- Unfunded security costs and lack of common sense on behalf of FDLE
- FDEP complexity growing and speed reducing.
- FSTED funding for ports being mixed by FDOT with non port issues.
- Security costs in FL higher than competing states.
- Security operations & costs in some ports out of scale with port revenues - cost & time delays could scare away business.

### Northeast and Central Coast

- Insurance cost is a growing challenge/problem.
- Lack of state funding
- Security requirements of State that conflict with Federal.
- Lack of dredging funding.
- DCA position on port comprehensive plans that causes double work and cost for ports.
- Higher fuel taxes in Florida puts us at a competitive disadvantage.
- Florida's maximum weight limitation on OTR trucks is lower than several states in the southeast, including Georgia.

### **Regional Headwinds (Challenges potentially hindering Florida's seaports)**

*In the space below list any regional challenges potentially hindering Florida's seaports that need to be considered.*

**e.g.**

- Public and private sector attitudes and education regarding ports and their role, value and contributions.
- Constrained land; urban development--affects ability of ports to grow in terms of deepening channels etc.

### ***Survey Responses:***

#### *West Coast and Panhandle*

- The Panhandle ports are constrained by lack of developable land.
- Escalation of value of waterfront property - increasing difficult for ports to acquire and expand  
Competing land uses
- Large number of privately-held ports vs. Port-owned assets...limits the ability to effectively coordinate solutions.
- Public pressure to clean up port activities and/or shift the "dirty" businesses farther south in Tampa.

#### *Southeast*

- Need to get all participants in the port community speaking in the same voice.
- incremental costs of growth
- economic competition for waterborne land uses
- community and environmental challenges
- balancing port business and politics
- Extremely poor access to and from the Port of Miami.
- Lack of understanding by private and public sector of importance of international trade to the region.
- Pressure on MPO's to support urban growth and development limits ability to support port growth and maintenance of access corridors.
- Growth of surrounding communities restraining ports abilities to maintain access and grow to meet growing cargo volumes.

#### *Northeast and Central Coast*



This is the most important piece on this puzzle, b/c there has to be a better way to communicate with local officials and find an immediate solution to the mobility and connectivity of the freight. Enhancements in transportation made as a relief to building more roads.

The FDOT needs to recognize hub to hub connection on the SIS  
 Entire chain has to all work at lowest cost.

Southeast Users

- Support Atlantic Commerce Corridor
- Efficient (cost effective) movement of cargo is critical not just for growth in trade, but to maintain present volumes.
- Extremely important, especially connecting the N/S corridor over the water.
- Also short the time trucks spend in ports.
- State of Florida (government) should purchase Florida East Coast Railway and then develop it.
- With the high price of land in this part of the state, it is important that intermodal connectivity be developed, to include all aspects, especially railroad.

Northeast and Central Coast

- Mobility is one of best advantages Jaxport has when competing with neighboring ports.

**B. Improved cargo and passenger throughput.** On- port landside cargo and cruise terminal and handling system upgrades are needed to enhance cargo and cruise passenger throughput and increase port capacity.

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	29	21	6	1	0	4.4
West Coast and Panhandle	9	8	2	0	0	4.4
Southeast	16	9	3	1	0	4.4
Northeast and Central Coast	12	5	1	1	0	4.5

*Survey Comments:*

West Coast and Panhandle

- Increasing/improving port diversity is ultimately a good thing.
- Security has become the "wild card," putting Florida ports at a throughput disadvantage in relation to ports in other states.
- Need improvement on people side. Port workers do not have any option for formal training.
- Port St. Joe must create the landside systems in order to create capacity.
- Throughput improvements critical because demand will exceed capacity. On port, yes, but also water/port/inland.

Southeast

- Important not only to increase capacity, but competitiveness.
- Need to include berths as part of the overall system.
- technology can play a big role in increasing throughput for land locked facilities
- Technology/systems that improve turn-times for trucks/rail to improve efficiency of ports/terminals.
- Different operators/trades have different requirements.
- Throughput may not depend on expensive upgrades.

Southeast Users

- SIS \$\$\$, Lack of Mobility
- Florida ports need seamless hardline systems for people and cargo in order to stay competitive in time/cost with competing non-Florida ports.
- Needs outside port land for empty containers and loaded if necessary.
- On-port systems are in pretty good shape.

Northeast and Central Coast

- Jaxport is seeking location for permanent cruise terminal as current location is air draft restricted.
- Cargo handling equipment is 50 gage and must be replaced with 100 gage cranes at some point to remain competitive

**C. Competitive market assessment and port diversification.** Ports are faced with significant challenges in sustaining growth and diversifying their business base and need to explore ways of rationalizing their markets.

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	10	20	24	1	2	3.6
West Coast and Panhandle	1	8	9	0	1	3.4
Southeast	5	11	10	1	1	3.6
Northeast and Central Coast	4	8	8	0	0	3.8

*Survey Comments:*

West Coast and Panhandle

- Selecting for greatest ROI, diversification vital in ports. Ports working together on market shares as part of regionalization.

Southeast

- Diversification has helped protect ports from market changes and has helped expand revenues. An example is the cash flow provided by cruise operations for cargo facility construction at ports that have both cargo and cruise operations.

- Ports need to consider cost/benefit of all decisions and must be able to respond to opportunities in a timely manner.

Southeast Users

- Lost vs. Benefit
- It ties back to A.
- As port expands, and as ships get larger (esp. cruise ships), room needs to be left for smaller cruise ships. With Cuba becoming an opportunity for high-speed ferries we must diversify cruise options.

Northeast and Central Coast

- Jaxport has a diversified base so this is not as critical except in maintaining the base.
- With international trade increasing, diversification is not the problem, terminal and infrastructure capacity and constraints are.

**D. Recognition of the vital role ports play as economic engines in their local communities, regions, the state, and the nation.** Ports seek to retain and stimulate economic development and job growth to fulfill their mission as economic engines of their local communities, regions, the state and the nation.

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	40	14	4	0	0	4.6
West Coast and Panhandle	12	6	1	0	0	4.6
Southeast	20	7	2	0	0	4.6
Northeast and Central Coast	14	5	1	0	0	4.7

*Survey Comments:*

West Coast and Panhandle

- It is a local story that constantly needs to be told.
- Economic development for our community/region is the reason for our existence.

Southeast

- Some communities with major ports still "don't get it" and do not acknowledge the economic benefit the port provides. Because they don't recognize these benefits, they sometimes ignore the port's transportation projects in favor of other priorities, frustrating port plans and putting the port at a competitive disadvantage.
- It is important to show in dollars the benefit of your port to the decision making folks. Please educating and meeting with these people it is very important.
- Public awareness is always a positive.

Southeast

- Tell our story!
- Although the port shouldn't be sites for convention centers, as though their thinking is this being port business.
- Greater public awareness, community outreach, public relations are needed. Involvement of commissioners in recognizing PA as huge asset are required.

Southeast Users

- An age-old problem. The men and women in the street have no understanding of ports and the maritime community.
- Ports must do a better job of educating the public local/state about how important ports are to the local and regional economy.

Northeast and Central Coast

- Jacksonville is still abuzz with the Asian carrier announcement.
- I don't think the community knows this. This is one reason for the First Coast MPO Global Trade Conference on October 13. It will include the surrounding communities.

**E. Waterside navigation improvements.** The intermodal “highway” starts with a port’s channel and harbor. Improvements are needed to accommodate the dynamics of shipping market and vessel changes in a timely manner.

Region	5	4	3	2	1	Avg
All	33	17	7	0	0	4.5
West Coast and Panhandle	14	4	1	0	0	4.7
Southeast	15	9	5	0	0	4.3
Northeast and Central Coast	11	6	2	0	0	4.5

*Survey Comments:*

West Coast and Panhandle

- We must eliminate the constraints so manufacturers are assured of having the least-cost economics at play. Otherwise, the continued "outsourcing" of manufacturing with continue at the expense of Florida wage-earners and companies.
- Not only is maintainance of existing facilities and waterways important, but also dredging and places to put the dredge material. Need to expedite the permitting process.
- Improve pilot's performance to better utilize exiting waterways. Do away with Jones Act. Look at North Europe.
- Federal funding/processing of ports' channels/harbors to meet increasing vessel sizes and drafts is important.

Southeast

- If Florida's seaports cannot accommodate the newer deeper-draft cargo vessels because their channels are not deep enough or wide enough, they will lose market opportunities and play a less strategic role in international trade. This would be a step backward, as the ports are starting to see their trade with China and other Far East countries expand dramatically.
- Ports must be able to adapt quickly to the shipping and cruise businesses advancement in vessel construction
- We have to be able to get the ships to the dock to succeed in port/terminal growth.
- Main population centers may need giant ships more than smaller cities/ports.

Southeast Users

- Prepare our ports to service larger ships.
- Must stay in line with global trend of bigger/deeper
- Deep water dredging (50') required to capture new vessels being built now.
- Overcrowding at ports needs to be addressed. Cruise lines, including day cruise lines and future ferry ops., need to be able to maintain schedules.
- Smaller regional vessels don't need the draft of larger container ships.
- Deeper port and turn around basin
- Dynamics = bigger and bigger ships.
- They're coming and we are not ready here at Port Everglades.
- Need 50"+ Drafts to port
- Federal Government should pay a larger portion of the cost of dredging, especially to dredge below 43 feet.

Northeast and Central Coast

- Jaxport needs 45 to 50 foot channel depth.
- Dredging!

**F. Facilities and services that address the needs of port users.** Ports must provide market-sensitive facility and service costs to their users to retain and expand business opportunities.

Region	5	4	3	2	1	Avg
All	27	25	4	0	0	4.4
West Coast and Panhandle	11	8	0	0	0	4.6
Southeast	12	13	3	0	0	4.3
Northeast and Central Coast	8	10	1	0	0	4.4

*Survey Comments:*

West Coast and Panhandle

- Provide facilities at competitive prices.

Southeast

- Competing on service is the best way to attract and retain customers.
- Better service equals happy existing tenants/users and the ability to attract new tenants/users
- Customers are the key to ports' growth and opportunities. Facilities and services keep customers.
- Efficient cost, effective access.

Southeast Users

- We can only compete if we move goods/people faster, better, cheaper--safer
- Land use more important, others are having to build land mass. We should use out land with thought.
- Private sector and ports business plans must dovetail one another to maximize opportunities.
- Tariffs must be contained, especially as security costs increase.
- I know that the average citizen doesn't know the importance of economic values.
- Security costs too high.

Northeast and Central Coast

- This sounds repetitive but we must compete with neighboring state ports.

**G. Regional cooperation** to maximize use of resources. Promoting synergies to benefit public and private sector freight and passenger interests throughout Florida will maximize the benefits of the state's seaport system.

Region	5	4	3	2	1	Avg
All	14	25	10	6	0	3.9
West Coast and Panhandle	4	11	2	2	0	3.9
Southeast	7	13	5	3	0	3.9
Northeast and Central Coast	7	6	3	2	0	4.0

*Survey Comments:*

West Coast and Panhandle

- Needed

Southeast

- Drawing jurisdictional lines, rather than opening the doors to regional collaboration, can impede attempts to enhance the intermodal mobility and connectivity the seaports need to move their goods and passengers.
- And pay dividends to Florida citizens by reduced cost of goods and reduced congestion.
- Given the growth rate of Florida this will prove to be more and more important!

Southeast

- Under 1 port authority
- While there may be a benefit from regional cooperation, the ports with more in common may be too competitive with each other, while the ports that could/would cooperate with each other may have less in common to make the cooperation less valuable.
- Improve port ID process and accept them throughout state now.
- Turf remains a problem here in the Southeast.
- Ports should stop competing against each other by cutting their rates to the detriment of the public's best interest.

*Northeast and Central Coast*

- *No comments*

**H. Public-private partnerships.** Encouraging public-private partnerships will help maximize financial resources and collaboration between ports, the state and the private sector.

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	24	22	7	2	3	4.1
West Coast and Panhandle	7	8	2	1	1	4.0
Southeast	10	13	3	1	2	4.0
Northeast and Central Coast	11	6	3	0	0	4.4

*Survey Comments:*

West Coast and Panhandle

- Amen!

Southeast

- Those who benefit from maritime initiatives should be encouraged to partner in the investments needed to implement those initiatives because public sector financial resources cannot pay for everything that is needed.
- Create incentive programs for private investment at your ports.
- Sometimes hard to achieve in certain political structures
- Excellent option to expedite results.
- Competitive issues between ports?

Southeast Users

- Maximize dollars by investing strategically require 50/50 matching dollars
- Ideas and resources create growth
- Ports that are essential to national commerce should be supported with federal dollars. Security at ports is state and federal issue and should not be borne by port and port users.
- Ports to actively seek funds for development from users.
- If only the public sector would try it.

Northeast and Central Coast

- Bear in mind when the customer comes to the table with his own resources the port gives something up, could be control, revenue, etc. Customer is in business to make a profit and capital is always critical to the private sector.

**I. A safe, secure, sustainable and cost-effective logistics chain as part of an intermodal system for the transport of people and goods.** The seaports' strategic objective is to build a truly intermodal transportation system that provides seamless connections while ensuring a safe, secure, sustainable and cost-effective logistics chain for the transport of people and goods.

Region	5	4	3	2	1	Avg
All	32	19	3	1	1	4.4
West Coast and Panhandle	13	5	1	0	0	4.6
Southeast	15	11	1	0	1	4.4
Northeast and Central Coast	11	5	2	1	0	4.4

*Survey Comments:*

West Coast and Panhandle

- Obviously
- Interface of elements of throughput.

Southeast

- This is absolutely needed to fulfill the mission of Florida's seaports.
- Not an issue depending on the location of the port.

Southeast Users

- Get in, get out, or get out of business
- Security plans must be nationally related to reasonable risks.
- Combine efforts of ports with airports.
- Port drivers are the worst paid workers in the port industry.
- Intermodal? Yes!

Northeast and Central Coast

- Rail providers do not always have same view as ports on moving goods from ports. Often easier for rails to require off port delivery rather than provide stellar service on port.

**J. Ports are committed to the development, protection and preservation of permanent industrial land sites that enable port and industrial users to deal with business growth and limit residential uses that are not consistent with the port's needs.**

*(Note: This question was drawn from the input at the first three regional workshops and tested only with participants at the last regional workshop for Southeast Users.)*

Region	5	4	3	2	1	Avg
All	8	3	4	0	1	4.1
West Coast and Panhandle						
Southeast (Users only)	8	3	4	0	1	4.1

Northeast and Central Coast						
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Southeast Users

- Tell our story--so that local leaders respond. Educate our local/state/federal leaders.
- Waterside port business need be for port trade only.
- There is not enough land to expand for any South Florida ports.

**List any others that should be considered:**

West Coast and Panhandle

- It is important that individual florida ports take advantage of the Florida Ports Council to build consensus for public policy initiatives and maintain unity within the Florida Ports.
- State funding support of seaports should be increase to relect the benefit and importance of ports and the ROI to the state.

Southeast

- A larger dedicated revenue stream that the seaports can rely on.
- Greater ability to prioritize and decide what projects need to be built to improve mobility.
- Equal access to federal, state, and local funds with the other modes.
- Essential components of entire transport chain need access to land near ports at cost they can afford.

Southeast Users

- Highest and best use of real estate that promotes trade movement.
- Truck Driver Recognition Day. Good PR. Job postings area set aside for all users to post. Ports should work to get good news out about port activities and job opportunities.
- We should pursue the regional port (seaport and airport) idea for Southeast Florida. Keep on trying!
- Reduce security costs.
- Do you consider barge traffic on the ICW to be part of your transportation network?
- If you do, the contolling depth must be maintained, monitored and publicized.

Northeast and Central Coast

- Security, security, security!!!
- Develop off-port facilities to supplement waterfront activities.



<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	27	12	1	0	0	4.7
West Coast and Panhandle	15	3	0	0	0	4.8
Southeast	6	5	1	0	0	4.4
Northeast and Central Coast	12	5	1	0	0	4.6

*Survey Comments:*

West Coast and Panhandle

- Constant market vigilance is important.

Southeast

- Out-of-state and off-shore seaports are always looking to capture trade routes and liner service that could flow to Florida's major container ports. For the bulk ports as well, changing markets and new customer demands dictate vigilance and flexibility. The private sector has a different time frame than the public sector and the seaports -- public sector entities that must function as businesses -- must be able to turn on a dime to meet customer demand.
- The FDOT SIS needs to be more flexible with its criteria for eligible project for funding

Northeast and Central Coast

- Tell this to FDOT as it attempts to put ports in the "road box" as far as long range planning and investment.

**3. The Florida seaports must find and build into the strategic plan the appropriate balances between commerce, global competition, mobility, and security.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	17	22	2	0	0	4.4
West Coast and Panhandle	7	10	1	0	0	4.3
Southeast	5	6	1	0	0	4.3
Northeast and Central Coast	6	13	0	0	0	4.3

*Survey Comments:*

West Coast and Panhandle

- I think you can balance commerce, mobility (transportation projects), and security. I do not know how you balance global competition.

Southeast

- The balance is between commerce and security, rather than among the four factors listed. Too stringent or inefficient security impedes the flow of commerce. I see the rest not as a balance, but a chain: the seaports require mobility, among other things, to compete successfully in global markets, thereby engendering commerce.
- This balance is critical to the growth of the port industry in Florida

Northeast and Central Coast

- Security is important.

**4. The Florida seaports must find and build into the strategic plan the appropriate balance between mobility and the impacts on the environment and community.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	22	12	5	1	0	4.4
West Coast and Panhandle	10	6	1	1	0	4.4
Southeast	5	5	2	0	0	4.2
Northeast and Central Coast	12	3	3	0	0	4.5

*Survey Comments:*

West Coast and Panhandle

{No additional comments were offered}

Southeast

- The seaports see themselves as stewards of the environment, and federal and state requirements provide the structure for the seaports to achieve the proper balance through permitting negotiations. The issue is when agency representatives or private interests forget that building a seaport is not like building a dock for one's private boat and try to prevent the construction of what a seaport needs to generate jobs and economic benefits for the community.
- Growing and developing ports in an environmentally conscious way is very important
- Should focus on industrial land preservation

Northeast and Central Coast

{No additional comments were offered}

Planning Process Principles

- 1. The development of the seaport strategic plan should be a collaborative effort directly involving and engaging the state's 14 deep water ports and all levels of**

government (federal, state, regional and local), private sector users and owners of Florida’s trade and transport system, all modes of transportation (seaports, railroads, airports, highways, transit, trucking and space).

Region	5	4	3	2	1	Avg
All	18	15	5	1	1	4.2
West Coast and Panhandle	8	5	4	1	0	4.1
Southeast	5	6	1	0	0	4.3
Northeast and Central Coast	7	9	1	0	1	4.2

*Survey Comments:*

West Coast and Panhandle

- I think the Federal Gov't has very little involvement in this kind of planning (outside of dredging projects). I am also skeptical about the private sector's ability to offer a consistent point of view, beyond verifying the need for service.
- Too many at the table may tend to "water down" the plan to where it is no longer effective.

Southeast

- Maritime stakeholders are critical to seaport development and their collaboration and input are important to get their buy-in to the plan; but those who manage and operate seaports have the best understanding of what it takes to have a successful enterprise and they should have the predominant role in developing a seaport strategic plan.
- All stakeholders need to be engaged, involved and in agreement to have success
- Entire process/steps must work.
- Need to be careful to develop a process that allows for consensus.

Northeast and Central Coast

- Not all 14 are created equal.

**2. The Seaports and their partners should engage in a process to build understanding and consensus on the needs, policies and strategies to ensure Florida’s competitiveness in the global market.**

Region	5	4	3	2	1	Avg
All	19	11	7	1	1	4.2
West Coast and Panhandle	12	4	1	1	0	4.5
Southeast	6	6	0	0	0	4.5
Northeast and Central Coast	5	5	6	0	1	3.8

*Survey Comments:*

West Coast and Panhandle

- Ongoing dialogue.

*Southeast*

- Consensus is a good thing. It is especially good if it brings more dollars for seaport development.
- Consensus will be important.

*Northeast and Central Coast*

- Jaxport "partners" are our tenants in general and I'm not sure they all care as much as we do. They can move if the grass is greener across the state line.



West Coast and Panhandle

{No additional comments were offered}

Southeast

- I agree on principle, but don't really have the numbers to prove it.
- State policy is slowly increasing logistic costs and thus reducing lower purchase prices to consumers. We are slowly losing the edge.

Northeast and Central Coast

- If this statement is true why is gas next to a port facility where it arrived and is stored the same price or higher than inland locations?
- This may be true overall nationally, but transportation costs that are passed on to consumers is often averaged out so as to not provide local advantages.

**C. Each of Florida's seaports is vital to the state's overall maritime system participating in a network of seaports handling varied commodities and serving different trade lanes.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	20	12	4	3	0	4.3
West Coast and Panhandle	12	5	1	0	0	4.6
Southeast	6	5	1	0	0	4.4
Northeast and Central Coast	6	6	2	3	0	3.9

*Survey Comments:*

West Coast and Panhandle

- Perhaps its better to say each of Florida's active seaports

Southeast

- Definitely. The diversity of our seaports is a source of strength. Even in cases where there seemingly is an overlap or redundancy, that is actually a benefit in emergencies. It also provides a broader market for stakeholder businesses. As each seaport grows and faces land constraints, Florida will be very fortunate to have the back-up capacity provided by ports that were once considered somewhat irrelevant.
- Each port plays an important role.

Northeast and Central Coast

{No additional comments were offered}

**D. Each of Florida’s seaports provide vital economic and transportation contributions to their host communities.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	23	11	3	2	0	4.4
West Coast and Panhandle	12	5	1	0	0	4.6
Southeast	6	4	2	0	0	4.3
Northeast and Central Coast	8	6	1	2	0	4.2

*Survey Comments:*

West Coast and Panhandle

- {No additional comments were offered}

Southeast

- Definitely. Each seaport provides economic contributions to its local community. Check out the various economic impact studies prepared for the various ports, and you will see just how important these contributions are. The ports have just identified the benefits each has derived from the 1996 bond program, proving the substantial impact the projects implemented under that program -- as well as the 1999 program -- have had on their capacity, throughput, and competitive ability. I'm not sure what you mean by "transportation contributions," unless you mean the cost of goods is less if they come directly into the local community. A cynic would say, "yeah, lots of trucks and rail cars and buses."
- Communities can be more regional or local depending of the port.

Northeast and Central Coast

- Not all 14 ports are active.

**E. Florida role as gateway to Latin America has provided two-way trade, transportation and jobs for the economies of Florida and its trading partners.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	21	13	3	2	0	4.4
West Coast and Panhandle	12	3	3	0	0	4.5
Southeast	8	4	0	0	0	4.7
Northeast and Central Coast	6	9	0	2	0	4.1

*Survey Comments:*

West Coast and Panhandle

{No additional comments were offered}

Southeast

- Definitely! More forward-looking policies are needed to continue kick-starting the economies of some of Florida's trading partners in the Caribbean, Central America and South America. The impact of China's recent investments in that part of the world need to be assessed. If they help grow the economies of those nations, and increase their purchasing power and desire to buy goods from the U.S., then we all win. We need to be smart.

Northeast and Central Coast

{No additional comments were offered}

**F. Florida serves as the nation's "third border" carrying goods between markets throughout the U.S. and the rest of the world over the state's "Atlantic Commerce Corridor" and over the state's other established trade corridors.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	15	12	6	3	1	4.0
West Coast and Panhandle	8	6	2	1	1	4.1
Southeast	5	3	3	0	0	4.2
Northeast and Central Coast	6	4	4	2	0	3.9

*Survey Comments:*

West Coast and Panhandle

- This is an pretty big overstatement
- Plus jobs and tax revenue.

Southeast

- The third border concept applies more specifically to Florida's relationships with its trading partners to the south in Central America, South America, and the Caribbean. While Florida is seeing its trade with other parts of the world -- particularly China -- the Third Border countries are important to Florida's two-way trade and the economic viability of locally based carriers, freight forwarders, and other industry stakeholders. Certainly, the Atlantic Commerce Corridor and the state's other established corridors are important to the flow of goods from all over the world to and from Florida's seaports.

Northeast and Central Coast

{No additional comments were offered}

**G. Sustaining Florida seaports' competitive international trade network that fosters economic development is a moving target requiring constant market vigilance and investment flexibility.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	21	16	1	0	0	4.5
West Coast and Panhandle	10	6	1	0	0	4.5
Southeast	6	5	1	0	0	4.4
Northeast and Central Coast	8	9	0	0	0	4.5

*Survey Comments:*

West Coast and Panhandle

{No additional comments were offered}

Southeast

- Out-of-state and off-shore seaports are always looking to capture trade routes and liner service that could flow to Florida's major container ports. For the bulk ports as well, changing markets and new customer demands dictate vigilance and flexibility.

Northeast and Central Coast

Again, tell this to FDOT.

**H. Florida seaports collectively have in-house resources to fund only between 23-25% of their \$2.6 billion capital planning needs. (Five Year Capital Needs Plan.).**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	17	13	3	2	0	4.3
West Coast and Panhandle	7	8	1	1	0	4.2
Southeast	1	6	1	1	0	3.8
Northeast and Central Coast	10	5	1	0	0	4.6

*Survey Comments:*

West Coast and Panhandle

- Or less!

Southeast

- This statement was calculated by the FPFC's financial advisor, based on the seaports' statement of capital needs and available funding, so I agree.

- Funding large scale capital infrastructure projects is very difficult in the current environment

Northeast and Central Coast

{No additional comments were offered}

- I. Florida seaports' financial capacity has been affected by: the continuing and rising cost of capital improvements; the recent diversion of revenues to pay for enhanced security since 9/11; the increasing annual operating costs; and the changes in the national and world economies.**

Region	5	4	3	2	1	Avg
All	28	9	2	0	0	4.7
West Coast and Panhandle	11	4	2	0	0	4.5
Southeast	8	4	0	0	0	4.7
Northeast and Central Coast	16	2	0	0	0	4.9

*Survey Comments:*

West Coast and Panhandle

- I agree with that rising construction costs and rising security costs have limited ports' resources. But I think annual operating costs and economic trends have not necessarily hurt florida ports.

Southeast

- Each of these factors has had an impact on the seaport' financial capacity. The rising costs of materials combined with implementation delays are like a one-two punch on top of the diversion of revenues to pay for mandated security infrastructure and the recurring operational costs associated with security. For example, if the Port of Miami tunnel had been built a decade ago, shortly after it received location design approval, it would have cost roughly half the current estimate.
- Cost are ultimately passed on to customers which may impact competitiveness with other ports and counties.

Northeast and Central Coast

{No additional comments were offered}

- J. Florida seaports have experienced a shift from commerce-related infrastructure investment to non-revenue-producing security requirements adversely affecting the seaports' ability to fund their development programs and build additional capacity needed to capture the anticipated expansion of international and domestic trade as well as cruise activities.**

<b>Region</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>Avg</b>
All	25	9	4	0	0	4.6
West Coast and Panhandle	12	3	2	0	0	4.6
Southeast	9	3	0	0	0	4.8
Northeast and Central Coast	11	4	2	0	0	4.5

***Survey Comments:***

*West Coast and Panhandle*

*{No additional comments were offered}*

*Southeast*

- Now that the seaports have made significant investments in their security infrastructure to meet mandated requirements, the costs that affect their bottom line are the recurring operational costs associated with security. These costs affect the seaports' ability to pay for their debit service and invest in new commerce-related infrastructure.
- Why is it a non-revenue producing security?
- Could you add a charge to every pax ticket that's sold to offset some of your security costs.
- Could you charge your tenants an additional fee for security, how about cargo? It also needs to be paid an additional security fee. Additional security costs it is something that every user needs to be paying for. Just like anything else. It is a reality we cannot escape from.
- Port security in Florida is more stringent than West Coast, Northeast or gulf ports-- Good but costs more.

*Northeast and Central Coast*

- Increase in cost through legislation without reimbursement has greatly reduced ability of ports to raise capital particularly through borrowing/bond market, etc.

**List any others assumptions that should be considered:**

*{No additional comments were offered}*