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TRANSPORTATION SERVICES DIVISION
DEPARTMENT OF REGIONAL INDUSTRIAL EXPANSION



TRANSPORTATION AND REGIONAL
INDUSTRIAL EXPANSION: USERS'
PERSPECTIVE ON ISSUES
FOR THE 1980s

VOLUME 2 SURVEY RESULTS

MAY 1984

TRANSPORTATION AND REGIONAL INDUSTRIAL
EXPANSION: USERS' PERSPECTIVE
ON ISSUES FOR THE 1980s

VOLUME 2 SURVEY RESULTS

Presented to:

Transportation Services Division
Department of Regional Industrial Expansion

By:

James F. Hickling Management Consultants Ltd.
Ottawa, May 1984

Ce rapport est aussi disponible en français.

TABLE 1

SUMMARY OF ISSUES -- REGION B.C. LOCATION VANCOUVER

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Rail Freight	Adequate Overall					
	Inadequate	Infrastructure/ Equipment	- Concern with adequacy/ age of rolling stock. Despite Crow revision, question whether incentive exists to actually do something (includes trackage situation).	- Dependency of resource economy upon low and competitive rates to move product to tidewater.	- Hope that Crow Rate revision will provide necessary funds to correct situation.	- Paramount need to remain competitive in inter- national markets.
	Inadequate	Service/Small Communities	- Decrease in service due to concentration on major lines. Petroleum product movements have had to switch to trucks.	- Problems associated with truck weight regulations and safety when serving small communities.	--	--
	Inadequate	Dangerous Goods	- Question of compatibi- lity with U.S. legislation/placarding.	- Problem has not fully materialized, but expected to in near future.	- Need for negotiations/ compatibility.	- Avoidance of potential problems.

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Air Passenger	Inadequate	Licensing	- Restrictions re. licensing of local/regional airlines. Federal gov't reacts too slowly to applications.	- Impact on movement of tourists (eg. to Vancouver Island) and expectations of Island residents.	- Less restrictive legislation.	- More access/service and benefit to tourism industry.
	Inadequate	Customs	- Continuous source of problems. A first and lasting impression; time delays and insufficient staff. B.C. Aviation Council concerned with customs and other services to non-B.C. private pilot entering B.C.	- Unmeasurable impact on tourism. Hindrance to further development of Vancouver as service/financial center to Pacific Rim.	- Reduce "red tape".	- Remedy image/impression. Improve tourism. Foster development of service/financial center.
	Adequate	Service (Mainline Carriers)	However, concern with service level in relation to development of service/financial sector vis à vis Pacific Rim. Vancouver as gateway to Pacific.	- Hindrance to desired trend.	- Improved service through bilateral agreements.	- More airlines, better service and increased competition.
Freight	Generally Adequate	Customs	Problems with speed of clearance of air cargo.	- Delays	--	--

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Road Truck	Adequate Overall	Legislation re: goods movement	- Concern with extent and complexity of Dangerous Goods Goods and other legislation re: movement of goods (eg. petroleum products). Problem of Dangerous Goods legislations with respect to U.S. shipments (ie. compatibility)	- Time spent accomo- dating legislation; impact on operating costs; often counter productive. Restrictive in terms of development.	- Improved raport between gov't and industry. Clarify Federal legislation before implemen- ting provincial/ municipal equivalents.	- Reduce negative impacts of legislation on users and operators.
		Regulation/ Access	- Need for some degree of regulation. Gypsies are hurting licenced carriers.	- Damage to viability of established carriers. Safety.	- Better adminis- tration and policing.	--
		Size/wt. Legislation	- Concern with difference in Provincial size/wt. limits.	- Disruption to inter- provincial truck movements.	- Under review at present. Need uniformity among provinces.	--
Other Road/ Auto- mobile	Adequate Overall	Tourism/Access	- Need for adequate road system to allow move- ment of tourists from Vancouver to beyond points (National Parks).	--	--	--
Bus	Adequate	--	--	--	--	--

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Freight (cont'd)	Inadequate	Regulation/ Competition	- Problem of regulated Canadian/deregulated U.S. railways. More than 40% of B.C. goods sold in U.S.; 70% moves by rail.	- Loss of competitiveness as U.S. lumber producers have access to deregulated carriers and unpublished rates. Generally, Canadian manufacturers not getting same treatment in U.S. as U.S. shippers.	- No consensus. Need some deregulation but probably not same as U.S.	- Foster competitiveness of Canadian producers.
Passenger	Inadequate	Service and Cost	- Generally negative comments re: trans-continental service, performance and subsidy/cost to taxpayer. Specific question of why Vancouver/Jasper/Edmonton service should be reinstated.	- Cost to taxpayer for service aimed at specific market (tourism in general, and specifically Japanese market).	--	--

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Marine	Generally Adequate as is.	General	- Importance of port facilities (Vancouver and Prince Rupert) and water transport to B.C. resource-based economy and exports (and to Western Canada). Perception that B.C.'s future premised on looking West/Pacific Rim market.	-	-	-
	Inadequate	Costs/Charges	- Port of Vancouver charges "outlandish" in comparison to U.S. ports (\$7-8/ton vs. \$17-18/ton). Multiple and confusing charges.	- Impact on transport costs for resource sector; transport costs constitute large proportion of total value and can determine market competitiveness.	- Perhaps little that can be done. Rather, should concentrate on manufacturers themselves, and cost of production.	-
	Very Inadequate/ Problem Area	Labour	- Labour problems contribute to higher costs and disruptions to service.	- Costs, labour and other considerations give rise to vulnerability of losing business (liner trade) to other ports (eg. Seattle). Once lost, hard to regain.	-	-

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<u>Marine</u> (cont'd)	Adequate	Conferences/ Competition	- Despite Shipping Conference Exemption Act (expiring March, 1984) and limited number of conferences, opinion that marine rates are acceptable. However, need to protect and maintain this service.	- Crucial to resource sector.	- Need for federal government to recognize importance; involve industry (vs. carriers) more in deliberations. Belief that jurisdiction control should not be vested so much with Transport Canada.	--
	--	Canadian Flag Deep-Sea Marine	- Consensus that Canadian flag marine not feasible and would be disastrous.	- Would end up hurting both the shipper/ exporter and Canadian taxpayer.	- Promotion of Canadian shipbuilding efforts for Beaufort/ North Slope equipment requirements.	- Avoid risk of making Canadian exporters non-competitive in international markets.

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Marine (cont'd)	Problem Area	Road system/ Port Master Plan.	- Problem of obtaining approval for arterial road (Burrard Inlet waterfront) Local/residential opposition.	- Road necessary for efficient movement of containers.	--	--
		Container Traffic, U.S. vs. Canadian ports.	- Concern with fact that 30% of Canadian container traffic is entering via Seattle. However, short-term efforts by gov't to swing trade to Vancouver ineffectual.	- Reduced container traffic through Vancouver. Lines will not switch based on short-term proposals. Opinion that Federal Government hesitates to push too hard because of U.S. container traffic through Halifax, and possible reciprocal action/retaliation by U.S.	- Longer term commitments by government, based on consultation with shippers. However, perception that S/S conferences dictated by Los Angeles and New York (ie. U.S. interests).	--

TABLE 2

SUMMARY OF ISSUES -- REGION ALBERTA LOCATION EDMONTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u>	Inadequate	Overall	- Perception that Edmonton is not fully competitive as an air service center; generally regarded as a 2nd class air service centre in Western Canada.	- Difficulty in attracting or retaining companies with national or international operations; jeopardizes ability to attract corporate and hi-tech industries. Airlines discount Edmonton as a competitive tourist market.	- Existing Air Services Authority lacks jurisdiction and authority. Recommend Edmonton Transportation Authority and strategic plan.	--
	Inadequate	Terminal Facilities	- International Airport (as opposed to Municipal). As above, and fact that passenger counts of 2 A/P's not aggregated.	- As above; image/impact on business travel and tourism.	- 6-8 airline gates, parking structure and a hotel.	- Augment tourism/business travel.
	Inadequate	Service/Connections	- Split in passenger services between International and Municipal A/P's. Inbound passengers heading north must switch A/P's. Also, PWA airbus service at Municipal A/P. Also bilateral agreements not exercised.	- Damaging to Edmonton's position as an air center in terms of serving north (North Slope oil patch). Detrimental to development of International A/P. Impact on tourism.	- Rectify situation of 2 A/P's; strategic plan. Possibly take commuter services out of Municipal and use it in cargo and corporate/private flights.	- Remedy inadequacy as stated.

TABLE 2

SUMMARY OF ISSUES — REGION ALBERTA LOCATION EDMONTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Air (cont'd)	Inadequate	Customs/ Immigration	- Need to be upgraded at both A/P's.	- Image and effect upon tourism/business travel.	- Upgrade	- Improved image and service.
	Inadequate	Pricing/air fares	- With deregulation in U.S., it is cheaper, for instance, to fly out of Seattle to beyond points.	- Loss to airlines of passenger revenue; further erodes competitiveness.	- Regulatory matter - needs investigation.	--
		U.S. Markets	- Canadian air transportation is structured on E-W considerations. N-S flow of traffic and importance of U.S. markets not sufficiently taken into account.	- Inconvenience and cost to N-S business/traveller/tourist.	- As above.	- Realize tourism potential.
Air Freight	Inadequate	Origins/ Destinations Customs/ Brokerage	- Considering Alberta's orientation to petroleum industry, insufficient direct connections to Dallas/Houston.	- Air freight from Texas goes through Toronto. Time and cost impact.	- Direct connections using equipment capable of taking air freight.	- Savings in time and cost to industry.

TABLE 2

SUMMARY OF ISSUES -- REGION ALBERTA

LOCATION EDMONTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Road						
Highways/ Infra- structure	Inadequate	Specifically Yellowhead Hwy.	<ul style="list-style-type: none"> - Edmonton not recognized as being an E-W mainstram of interprovincial road services. - Federal gov't regards Yellowhead Hwy. as secondary interprovincial route. Does not receive financial support provided TransCanada Hwy. 	<ul style="list-style-type: none"> - Therefore not considered primary location for many distribution companies. Also not considered competitive in road passenger sector of tourism. - As above. Also, negative image due to increasing number of traffic fatalities on Edmonton/Jasper section. Non-competitive tourist route. 	<ul style="list-style-type: none"> - Provincial gov't 10 yr. program to twin Yellowhead Hwy. - As above, but attention to Edmonton/Jasper requirements is inadequate. 	<ul style="list-style-type: none"> -- --
	Inadequate	General	<ul style="list-style-type: none"> - Inadequate promotion of Edmt. in Eastern Canada as primary road transportation and distribution center for Western Canada. 	<ul style="list-style-type: none"> - As above. 	<ul style="list-style-type: none"> - Needs joint effort by Fed/Prov/Municipal gov'ts. 	<ul style="list-style-type: none"> --

TABLE 2

SUMMARY OF ISSUES -- REGION ALBERTA LOCATION EDMONTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY/RESULTS	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
ROAD						
Trucking	Adequate	--	<ul style="list-style-type: none"> - Although generally perceived as adequate, problems mentioned include: <ul style="list-style-type: none"> - cyclical/seasonal shipping requirements (eg. potash) with result that sufficient equipment not always available, - accessibility/ease of obtaining permits possibly to a fault, resulting in large number of operators and frequent bankruptcies. Also, difficulty of obtaining interprovincial licences. Difficult for small operators to remain viable in perhaps over-competitive environment. 	<ul style="list-style-type: none"> - Compounded effect of running risk of monopolistic situations. 	<ul style="list-style-type: none"> - Not stated, but inferred requirement for some degree of control/improved administration. 	<ul style="list-style-type: none"> - Improve stability of trucking industry.
	Inadequate	Interprovincial Wt. Standards	<ul style="list-style-type: none"> - Interprovincial weight (GVW) standards not uniform. 	<ul style="list-style-type: none"> - Difficulty when moving freight interprovincially. GVW in one province may not be acceptable in another. Cannot optimize shipments. 	<ul style="list-style-type: none"> - Make uniform. CTC currently reviewing. Solution need not be to go higher (because of impact on highways) but rather uniform. 	--
	Problem Area	Dangerous Goods	<ul style="list-style-type: none"> - While air and rail have been more fully addressed, trucking (provincial) at embryonic stage. 	<ul style="list-style-type: none"> - Operational/cost implications for industry if legislative authorities do not sufficiently take into account their needs. 	<ul style="list-style-type: none"> - Rapport/consultation between industry (users) and authorities (implementors). 	<ul style="list-style-type: none"> - Avoidance of potential problem.

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Bus	Adequate	General	- Minimal comment, except for effect of fuel price on operations vs. U.S. operators, and unspecified concern with potential deregulation.	- Tourism	--	--
Auto-mobile	Adequate	General	- Same considerations re. highway system (Yellowhead) and fatalities/safety. Also concern with fuel prices and effect on travel.	- Tourism	--	--
Rail Freight	Adequate Overall	General	- Low value products for which transportation constitutes a relatively large percentage of total cost/price. Overall importance of maintaining competitiveness in a region where most products go out by rail.	--	--	--

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Rail (cont'd)	--	- Seasonal Requirements	- Despite general adequacy, mention made of the following: - cyclical/seasonal nature of some commodity shipments - (potash, anhydrous ammonia) can lead to equipment shortage,	--	--	--
		- Interswitching	- interswitching; 4 mile limit frequently a problem. Cannot always obtain desired routing,	--	- Under review.	--
		- Crow	- Crow Rate; a situation that transcends regional boundaries. Hoped that revision will rectify problems (age of rolling stock) and allow railways to meet future capacity demands through additional investment.	- Impact on forecasted capacity demands.	--	--
			- Dangerous Good Legislation: too restrictive and incompatible with U.S. operators/legislation.	- Could materialize into a problem. Also, difficult for current or even new equipment to meet certain regulations.	- Needs study by all parties concerned.	- Avoid potential problems/ disruptions of U.S. shipments.

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Rail (cont'd)	Inadequate	Rates	- E-W rate structure is disadvantageous to Edmonton. Rates, Eastern Canada to Vancouver, lower than same shipment into Edmonton. OCP rates permit Winnipeg to ship cheaper to Vancouver than Edmonton and Calgary.	- Higher cost of goods received; passed on to consumer.	--	--
		Deregulation/ U.S.	- Deregulation and unpublished rates allows U.S. shippers to be much more aggressive; especially, shipments from Pacific NW to East.	- Canadian shippers are at a disadvantage for competing products/shipments. Have to absorb differential.	- CP to south (Calgary) have lowered rates, but not CN in northern Alberta and B.C. Needs review.	- Competitive-ness of Alberta industries in U.S. markets.
Rail Passenger	Very Inadequate	Service Frequency Routes Reliability	- Overall, VIA Rail's service is not well regarded. Cancellation of Transcontinental service through Edmonton supports perception that they are regarded as "2nd class citizens".	- Primary impact is in tourism. Consider that terminations of service done without consultation. "Lost face" in Pacific Rim markets.	- Need for overall improved service and infrastructure; opinion that new locomotives and bi-level passenger cars could pay out in 3-3½ years.	- Realize more of tourism potential.

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Rail (cont'd)			- Cancellation of Vancouver/Jasper/Edmonton service.	- Impact on tourism, especially Japanese mkt. Additional impact with influx of tourists for Expo '86/Vancouver.	- Reinstate	--
			- No rail passenger access from downtown Edmonton to Calgary.	- Detrimental to any effective rail transportation link between both cities.	--	--
			- Scheduling of Winnipeg to Edmonton service.	- Necessitates overnight stops in Saskatoon; discourages ridership.	- Through service reinstated by Transport Canada (Axworthy, Dec. 1983) announcement)	--
Marine		Northern Transportation Company Limited	- NTCL service on Mackenzie system not mentioned.	--	--	--
Other Container Port	--	--	- Proposal afoot to develop container port in Edmonton area.	--	--	- Enhance Edmonton's position as a major distribution center for Western Canada.

TABLE 3

SUMMARY OF ISSUES -- REGION SASKATCHEWAN LOCATION SASKATOON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Air Passenger	Inadequate	Service/Schedules	- Opinion that they are a captive market on long haul flights (only Air Canada) and schedules are determined by major centres (e.g., Vancouver, Toronto, Montreal). Have to "fight to let airlines know we are alive".	- Reduced number of direct flights; inconvenient departure/arrival times. Additional travelling time; Vancouver previously could be done in 1 day. Now 2 days with stayover (and cost). Impact on tourism.	- Need more service by smaller, regional airlines. Smaller, less costly equipment, allowing increased frequency and connections to major A/P's and beyond flights.	- Primary benefit would be to travel.
	Inadequate	Rates	- Comparison of business travel vs. other rates available. Also, Saskatoon rates higher vs. those at other points for routes of comparable distance because they don't have non-stop flights.	- Businessman is penalized.	- Consumer's expectations of equipment must change (see above).	--
	Inadequate	Market Access	- Entry of small air carriers blocked.	- Reduced competition and service, and higher rates.	- as above	--

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Air (cont'd)	Problem Area	Parallel Service	- If one airline changes schedule, then other one follows suit.	- Competitive tactic that doesn't help community.	--	--
	Inadequate	Customs	- Open only during normal daytime hours; otherwise "on demand".	- International flights few in number (Frontier Airlines from/to U.S.) therefore not serious problem re: passengers.	--	--
Air Freight	Inadequate	Service & Customs	- Do not have air <u>cargo</u> , either domestic or international. Trucked from Winnipeg. Small airfreight (parcels, etc.) - no clearance at A/P.	- Cannot pick-up at A/P. Must be cleared downtown; inconvenience, delays, etc.	- Have tried unsuccessfully to get Revenue and Taxation to open customs office at A/P.	--

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
ROAD Highway System	Inadequate	Yellowhead Highway	- Highway needs upgrading. However, a provincial not federal jurisdiction.	- Generally, upgrading would assist transport of goods over northern route (transit time). Also impact on tourism.	- Yellowhead Organization lobbying federal gov't. Need extra financing.	--
Truck	Adequate	General	- Competition good. However, mention made that: - cheaper to go by dedicated truck to Edmonton or Calgary vs. normal linehaul, - equipment adequate, but occasionally specialized equipment not available when you need it, - interprovincial GVW standards non-uniform, and can cause problems, - service to smaller communities sometimes hindered by road restrictions (GVW).	--	--	--

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Bus & Auto-mobile	Adequate	--	--	--	--	--
<u>RAIL</u> Passenger	Very Inadequate	Overall	- Schedules, reliability, equipment, cleanliness. Overall impression of bad service. "Makes you feel that they (VIA) don't want passenger service."	- Negative image presented to tourists, and also local (Prairie) business travel.	- "If we are going to be in passenger rail then we should do it properly."	--
Freight	Adequate	Overall	- General comments re: cost of shipping products of agriculture and mining industry represent significant proportion of total value. Often distant markets, and transportation costs (competitiveness) become major marketing tool.	--	- Ongoing need to research lower cost transportation systems. Example given of potash shipments to U.S. border by 200,000 GVW truck. "A train" with staggered wheel pattern.	--

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
RAIL Freight (cont'd)	Inadequate	Rates/Price	- Virtually no price competition between railways. Rates must be published and feeling that there is no incentive for Cdn. railways to offer competing rates.	- Lack of competition, especially in comparison to U.S. de-regulated carriers. Competing U.S. firms know what we have to pay - opposite not true.	- Strong case for increased competition but no consensus in industry re: regulation vs. deregulation.	--
	Inadequate	Subsidies	- MFRA/ARFAA Maritime subsidies and effect on competing suppliers of potash (Saskatchewan vs. N.B.)	- Saskatchewan cannot be competitive in Montreal market.	- Not a big market but nonetheless significant and indicative of how assistance to one region can hurt another.	--
	Adequate	Crow Rate	- Hopefully revisions will rectify historical situation whereby it was far cheaper (and therefore better) to ship rape seed and sunflower seed rather than processed oils.	- Oil production has been done in East.	- With revision, hope that more processing will be done in Saskatchewan.	- Development/boon to relevant industries.

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					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>RAIL</u> (cont'd)	Inadequate	Interswitching	- Occasionally a problem to existing firms and when trying to attract new industry.	- Cost to existing and unattractive to prospective new firm.	- CTC currently reviewing this issue.	--

TABLE 4
SUMMARY OF ISSUES -- REGION MANITOBA LOCATION WINNIPEG

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u> Freight	Adequate	General	Air cargo service available and probably adequate. However, not perceived as being used that much. For those who want speed and willing to pay the price (high value goods and reduced inventories).	--	--	--
Pass- enger	Inadequate	Service/ Frequency/ Rates	Belief that domination by national carrier (Air Canada - CP has terminated service) not acceptable	Dominance creates lack of competition, high fares, and infrequent enough departures/arrivals. Impact on tourist and business travel.	Deregulate and allow access by more carriers. However, also recognize that essential services have to be protected.	More competitive environment and benefits to consumer as noted.
	Inadequate	US Connections	Connections south of border are limited	Hindrance to business travel, and to development of mining potential, tourism, convention business, etc.	As above, deregulation.	Benefit especially to tourism.
	Very Adequate	Terminal Expansion	Currently underway (planning) judged necessary and good.	--	--	Improved overall service.
<u>Road</u> Truck	Inadequate	Intra-provincial Licences/Permits	Upon clarification, the rationale for regulation and franchise permits accepted, provided it is administered properly.	Permits often dormant and service/equipment not always available. Runs counter to idea of spreading industry to smaller centres.	Administer better; if permits not used, retract them; issue new ones as needed.	Provide service intended; better overall competition, development, etc.

TABLE 4
SUMMARY OF ISSUES -- REGION MANITOBA LOCATION WINNIPEG

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Truck (con't)	Problem	Rates	Manitoba compared to de-regulated Alberta trucking industry where rates lower.	---	However, appear to feel that rate competition would improve/correct itself with better admin. of permits (as above).	---
	Inadequate	Interprovincial Weight Standards	Non-uniform weights (or more correctly, axle loadings) complicate interprovincial trucking. Believe that federal gov't has not availed itself of authority under NTA (only Sunday operations).	Cannot optimize loading to province with higher weight allowance.	Make uniform; some feel should go to maximum allowable, but then question of who pays for upgrading of roads.	Avoidance of current problems.
Truck	Adequate	# firms Operating/ Competition	Notwithstanding above, feel that there is sufficient number of firms -- 6 major trucking companies with head offices in Winnipeg.	---	---	---
	Very Adequate	Piggyback	Rail/truck intermodal via piggyback viewed as offering potential and opportunity for growth.	---	---	---
	Problem	Fuel Costs	Differential between Canada and US and effect on operating costs. Alberta has no provincial tax on gas.	Interstate 90 and US 2 will become "Trans Canada" E-W route.	---	---

TABLE 4
SUMMARY OF ISSUES -- REGION MANITOBA LOCATION WINNIPEG

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Road</u>						
Bus & Auto-mobile	Inadequate	Fuel Costs	Specific area of concern is differential in gas prices, U.S. vs. Canada.	Have already noticed drop in bus tour market (and therefore impact on "through" tourism travel). Increase also in number of Canadian motorists entering Manitoba at border points vs. Trans-Canada route.	However, chances of Manitoba dropping tax are judged nil.	--
	Inadequate	Infrastructure	Have to learn to do a better job in services provided to tourist (e.g., bus and motorist) travel (restaurants, hotels/motels, etc. -- quality at good prices)	Judged inadequate at present and therefore not attracting business they could.	As indicated. More aggressive and positive approach needed.	Increase in tourism/revenue.
<u>Rail</u>						
Freight	Inadequate	Rates/Competition	Only 2 carriers, and exempted from Combines Investigation Act. Also, rates published.	Concern is not only lack of competition (and competitive rates) but also that shippers have come to accept (and not question) situation.	Preference for degree of deregulation. Also, smaller shippers should learn to join forces and make deals as do large companies.	--

TABLE 4
SUMMARY OF ISSUES -- REGION MANITOBA LOCATION WINNIPEG

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Rail</u>	Inadequate	Capacity	Mixture of considerations, including abandonment/tearing up of branch lines, retirement (and not replacing) old boxcars, etc. Specific mention of Churchill and line capacity problem (wheat) because of boxcar retirement and line cannot take hopper cars.	Effect (perhaps more importantly than "cost") has been to provide incentive for expansion and development of trucking business.	--	--
	Inadequate	Interswitching	4 mile limit as mentioned elsewhere.	Cost and inconvenience.	CTC currently investigating. However, skeptical that any changes or improvements will arise ("have investigated it before, and probably will again")	--
	--	Fuel Efficiency	Statement that rail, as most fuel efficient mode, will perhaps eventually force trucks off road on long hauls.	--	--	--
	Adequate	Piggyback	As above; opportunity and growth area.	--	--	--
<u>Passenger</u>	Inadequate	General	Although Winnipeg-Edmonton service has been reinstated, generally question viability of rail passenger service.	Perceived as being heavily subsidized and therefore a cost to taxpayer.	--	--

TABLE 4
 SUMMARY OF ISSUES -- REGION MANITOBA LOCATION WINNIPEG

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Marine</u>	--	General	Before St. Lawrence Seaway, significant general cargo used to come via Churchill to Western Canada. Now only export (wheat) -- charter vessels won't carry general cargo.	--	--	--

TABLE 5
SUMMARY OF ISSUES -- REGION NORTHERN ONTARIO LOCATION THUNDER BAY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u>						
Freight	N/C	--	No comment. Conversely, bus parcel express judged good (small items). Assume relatively minor requirement for air cargo, with demand and service (speed of delivery) met by truck.	--	--	--
Passenger	Inadequate	Rates/Schedules/Connections	General dissatisfaction with fares (shorter distance to Eastern Canada than other points West, but fares proportionately higher) inconvenient scheduling and poor connections. Nordair promoted as remedy, but has not benefited community (mostly parallel scheduling).	Impact upon business travel (and unattractive to prospective new industry -- reinforces isolation syndrome). Feel that they are being "ripped off" and not treated as part of Ontario.	Deregulation. Don't know if it would work because no experience in Canada. However, would have to be better than present. Also, smaller, regional airlines with smaller equipment perhaps better. Not "bigger" or more frequent flights, but smaller, better scheduling at less cost.	As stated
	Adequate	Facilities/Terminal	Straining capacity at present, but steps being taken to improve.	--		--

TABLE 5
SUMMARY OF ISSUES -- REGION NORTHERN ONTARIO LOCATION THUNDER BAY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Road						
Infras- tructure	Very Inadequate	Highways	Increasing capacity demand on existing regional roadways due to growth in trucking (both increased forestry products, e.g., newsprint -- and now suspected increase in shipments of specialty grains because of Crow Rate revision). Poor condition of roads as well. Feeling that provincial authorities won't recognize problem despite repeated efforts.	Port volume forecasted to increase, but "rubber" capacity won't keep up. Increased truck traffic competing with bus and automobiles. Accidents reported to be on the rise/safety issue. Concern also that transit time and therefore rates will increase as consequence. Two sections of concern; TransCanada to Manitoba border, and Thunder south to Duluth.	Make authorities recognize problem before it's too late.	Allow port to realize potential. (ie. remove bottlenecks). Improve tourism market.
	Inadequate	Facilities	Support facilities, rest stops, etc. absent.	Compounds above situation. Unattractive image and impact upon tourism.	As above	
	Opportunity	Customs	Opinion that Pidgeon River border crossing could be developed into major port of entry with warehousing, etc., and contingent benefits to employment.	--	--	--

TABLE 5
SUMMARY OF ISSUES -- REGION NORTHERN ONTARIO LOCATION THUNDER BAY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Road Truck	Inadequate	Competition/ Permits/ Equipment	Overall generally satisfied, but concerned with fact that Permits/Licences some not being used. Leads to shortage of equipment. Also, imbalance of volume (more out than in) with disincentive for operators to invest. Belief also that large operators are blocking applications. Generally, Cdn. trucking industry perceived as too restrictive compared to US.	Competition, service and rates not as good as permits issued would otherwise indicate. Again, province not recognizing problem. Compounded by road/infrastructure discussed above.	Not so much a matter of deregulation but better administration of current system. Similar to Winnipeg outlook.	Improved competition/service.
	Inadequate	Interprovincial Weight Standards	Non-uniformity.	Complexity and loss of productivity.	CTC reviewing at present. Want uniformity more so than maximization.	--
Bus & Auto- mobile	Inadequate	Highway Infra- structure & facilities	As discussed above. Region has important assets to develop but present situation detracts from developing potential.	Impact on tourism (creates poor image) and safety factor.	As above.	--
Rail Freight	Inadequate	Capacity	Inadequacy focussed on capacity of system in relation to Port interface.	A problem (inability to keep pace with Port) that will grow. Together with truck, a bottleneck re: movement of forestry products, grain, etc.	Rail Issues Task Force formed last year to address situation and present longrange plan.	--

TABLE 5
 SUMMARY OF ISSUES -- REGION NORTHERN ONTARIO LOCATION THUNDER BAY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Rail</u> Passenger	Very Inadequate	Overall	Service/scheduling and age of equipment.	Primarily an impact on tourism.	Mixed opinions, from termination of VIA to acquisition of new high speed equipment, new track, etc.	--
<u>Marine</u>	Very Adequate	Port of Thunder Bay	Users' opinion that it is well planned and operated. Ample capacity. Less storage now, but cross dock handling (and increased volumes). Charges/port costs are cheaper than US ports to south; do not have labour problems experienced elsewhere in Canada. Opinion that because of fuel costs, marine mode is becoming increasingly more attractive. Isolated mention of potential for cruise ship operations and therefore tourism potential.	--	--	--

TABLE 6
SUMMARY OF ISSUES -- REGION SOUTHWESTERN ONTARIO LOCATION LONDON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Air Freight	Inadequate	Overall	Opinion that they have enough air cargo volume to justify improved service (frequency of flights, destinations, size of equipment). Requests for better service "falling on deaf ears".	Speed of transit important for those industries wishing to maintain minimum inventory levels (e.g., automotive parts and suppliers). If goods must be shipped over Toronto, problem of transfer between carriers, multiple handling and risk of loss, misplacement and otherwise late delivery.	Use London as air cargo A/P for spill over from Toronto International. More direct routes to locations such as Buffalo, Detroit and Chicago. "Regulated" deregulation allowing access by more carriers.	Benefit to industry (inventory costs) and increases attraction to new industries.
Passenger	Inadequate	Overall	Same as above. Recent study indicated 300,000 one-way passengers per year, but potential of 550,000 and 700,000 in 1-2 years. 2/3 of travel is business travel with % to London higher than % from. Total (potential) air travel market split 65% domestic, 25% US and 10% international destinations. Terminal facilities undersized. Limited direct flights for out-bound tourist traffic. 300 passengers/day take bus to Toronto A/P. Air Ont. could not handle this additional volume. London/Toronto return air fare approx. \$120; bus and rail much cheaper.	Aggravation to business traveller who may take alternative mode to Toronto (rail, bus or automobile) or who must make connection for beyond flights rather than fly direct. As more business travel is to London vs. from London, creates negative image to outsider.	Easing or regulatory environment. As above. Improve terminal facilities/capacity. Diversion of traffic to London from Toronto.	-- Benefits to business traveller, and positive image/attractiveness to outsiders. Capital saving of Toronto of \$18 million vs. London upgrade of \$2.3 million for one-time saving of \$15.5 million. Net present value increase in operating cost over 20 years of \$4.1 million.
Freight Forwarding		Overall	Forwarders do not look upon London as attractive market. Costly and little or no published rates.	No comment.	--	--

TABLE 7

SUMMARY OF ISSUES -- REGION SOUTHERN ONTARIO LOCATION TORONTO

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u> Freight	N/C	-	Refer notes below on access to US markets for passenger travel. No criticism re: air freight, but assume any improvement in access would benefit competitiveness of Canadian industry. Also, general mention of air freight being increasingly used as alternative to maintaining high inventory levels.	--	--	--
Passenger	Adequate Inadequate	Overall Price & Regulation	Within domestic market and on shorthaul routes (eg. Toronto, Ottawa, Montreal service) price is key consideration. Example of change in Nordair's fare by \$20 and resultant change in ridership (20%) which returned to Air Canada once reduced fare ceased. Perception that we are paying inflated fares compared to U.S. carriers.	Straightforward matter of cost to consumer who would naturally prefer to have reduced fares.	Price deregulation. Issue being addressed by current CTC hearings. Recognize that certain essential services (eg. N. Ont.) must be protected, especially if tourism potential to be realized.	Savings to consumer/passenger.

TABLE 7

SUMMARY OF ISSUES -- REGION SOUTHERN ONTARIO LOCATION TORONTO

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Air (con't)	"	"	With respect to US markets, there is again perception that US fares are lower, more affordable and therefore accessible to more people. ("perception" true on major, highly advertised rates, but not necessarily all US routes).	Scenario of Canadian traveller driving to US (e.g., Buffalo) and taking US carrier. Loss of revenue to Canadian airlines. With forecasted growth in tourism, and especially Canadian tourists destined for US southeast and southwest, loss will augment. Also, Canada has lost share of tourism market.	As above, price deregulation.	Converse of cost.
	Inadequate	Access to US markets	As above, significance of travel to US by Canadian tourists.	As above, loss of revenue to Canadian airlines.	Require greater access to US markets by Canadian carriers (bilateral agreements) combined with competitive fare structure.	--
	Inadequate	Customs	First exposure of foreign traveller/tourist to Canada. Therefore, partially a public relations job. Although improvements made, still perceived as inadequate.	Image created and impact on tourism.	Upgrade as noted.	--

TABLE 7

SUMMARY OF ISSUES -- REGION SOUTHERN ONTARIO LOCATION TORONTO

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u>	N/A	STOL Toronto/ Montreal	Only briefly touched upon. Concern raised that Air Canada, rather than user, would pre-occupy CTC's attention and deliberations. Also, question duplicated downtown to downtown service (VIA vs. STOL) and whether and to what extent we should subsidize 2 systems.	--	--	--
<u>Road</u>	Potential Problem	General	Opinion that major road network runs risk of falling into state of disrepair. Not serious yet but will be 10-15 years. Funds not forthcoming from Federal government.	Aside from importance of usage to residents and industry of region, roads are next in importance (usage) after air mode to tourist. Access to outdoors/Northern Ontario. Tourism market will grow.	Adequate funding and maintenance.	Support tourism market potential.

TABLE 7

SUMMARY OF ISSUES -- REGION SOUTHERN ONTARIO LOCATION TORONTO

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Road Truck	Adequate	Overall	In a fairly price competitive environment (truck vs. truck, and truck vs. rail) service becomes more important than rates. However, this highlights problems with permits; too complex and restrictive (e.g., point-to-point) Judged relatively easy to get in (i.e., access) but more difficult to remain viable and profitable.	Restrictions to carrier become limitations to shipper.	"Regulated" deregulation with possibly a regionalization of permits rather than point-to-point and other barriers.	Improved service to shipper, and would help rationalize current imbalances in forehaul vs. backhaul (thereby tempering increases in rates).
	Inadequate					
Bus & Auto- mobile	Adequate	Overall	Bus scheduling/service good, but Toronto bus terminal a "disgrace". Automobile as mode of private transport is affected by adequacy of road infrastructure (see comments above).	Terminal busy at present, but if upgraded or rebuilt elsewhere, could be more so.	Upgrade or relocate.	Increase tourism.

TABLE 7

SUMMARY OF ISSUES -- REGION SOUTHERN ONTARIO LOCATION TORONTO

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Rail</u>						
Freight	Adequate	Overall	However, one must take into account that our rail rates, while they are low in comparison to European countries, are not as low as deregulated carriers in the US. 80% of our trade is with the US. Also, our rates are published, while US carriers are not.	US producer has a competitive advantage in penetrating markets.	If we are to penetrate larger US markets, then we must be as competitive as possible on price. Some degree of deregulation required.	Competitiveness and penetration.
	Inadequate	Interswitching	Cost of interswitching can comprise a significant portion of total rail costs on shorter hauls. Railways don't want to lose freight to one another.	Cost to shipper	CTC currently looking into this.	--
		Rates	A few unspecified concerns, but realization that shipper has alternative in truck, and competition between modes keeps rates down.	--	--	--
Pass-enger	Inadequate (VIA)	Overall	AMTRAK has "got it together", but not VIA. Mention made of customs; AMTRAK and VIA have apparently devised package, but customs have not yet learned.	Impact on Tourism	--	--

TABLE 7

SUMMARY OF ISSUES -- REGION SOUTHERN ONTARIO LOCATION TORONTO

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Rail</u>						
Passenger (con't)	Adequate (GO Train)	Overall	Expansion of GO Train system, Oshawa to Hamilton, while seen as costly, is also recognized as relieving pressure on road system and being less costly than a corresponding upgrade of the road system. Isolated mention that GO Station needs to be better, especially if increasing reliance/use of GO system.	--	-- GO Station improvement.	-- Meet future capacity demand.
<u>Marine</u>	--	General	Harbour "not what it used to be," has deteriorated and become an eye sore. Reduced throughput. However, realization that technology has changed (i.e., containers and size of vessels vis à vis St. Lawrence Seaway restrictions) This, the Seaway tolls, vessel operating costs and comparative railway costs have combined to make Halifax, Saint John and Montreal more economical.	N/A	--	--

TABLE 7

SUMMARY OF ISSUES -- REGION SOUTHERN ONTARIO LOCATION TORONTO

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Marine</u>	Inadequate	Conference Lines	Shipping Conference Exemption Act allows collective setting of rates. If Sofati and Cast go Conference, then Canadian shipper left only with Russian and Polish lines as non-conference.	"Captivity" of shipper and resultant (non-competitive) liner rates.	None given, except need for awareness of situation by federal gov't.	--
	Potential Problem	Canadian Flag Marine	Would not want to see this happen. Would be impossible to compete on price with other less costly flags (inexpensive manpower costs, or subsidization by Russians or Poles).	Both taxpayer and shipper would bear the burden under Defensive Legislation.		--
<u>Other Dangerous Goods</u>	--	General	Accept intent of legislation, but feel that it can be too restrictive when applied to the letter. Also, concern of incompatibility with US regulations (different placarding).	Impact at local level when applied by province or municipality (e.g., trucking). Will eventually lead to problems (U.S.).	Considerable discussion has taken place between policy makers and carriers/users. However, more is required.	--

TABLE 8

SUMMARY OF ISSUES -- REGION QUEBEC

LOCATION MONTREAL

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Air Freight	Very Adequate	--	--	--	--	--
Business/Tourism	Adequate	Westbound flights from Europe	Shortage of seats at certain times of year.	Inconvenience for business travellers.	--	--
Road Truck	Adequate	Permits for Intercompany hauling	Difficult to obtain.	Transport costs higher than need be.	Ease regulations.	Economies for large shippers.
Bus	Adequate	--	--	--	--	--
Auto-mobile	Inadequate	Urban Traffic	Heavy congestion.	Delays.	None given.	--

TABLE 8

SUMMARY OF ISSUES -- REGION QUEBEC LOCATION MONTREAL

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Rail</u> Freight	Adequate	Equipment	Car fleets kept at minimum -- thus if recovery is faster than expected capacity short-falls could arise.	--	--	--
Business/ Tourism	Inadequate	Tourism	Lack of North-South routes.	Dampens tourist trade from U.S.	Increased North-South connections.	Enhanced tourism.
<u>Marine</u> Freight	Inadequate	Rates	Concentration/Conference lines.	High rates - increasing 20-25% per year.	None suggested.	--

TABLE 9

SUMMARY OF ISSUES -- REGION QUEBEC LOCATION QUEBEC CITY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u>	Inadequate	Frequency Interconnections Rates Equipment Infrastructure	<ul style="list-style-type: none"> - Response from tourists, convention planners, businessmen. - Accessibility to Quebec City is difficult. - Until recently, airport could not handle large jets. Customs services were inadequate as well, resulting in delays of up to 3 hours for passengers last off aircraft. 	<ul style="list-style-type: none"> - Loss in tourism and convention business. - Exodus of business to Montreal and Toronto. - Inability of region to attract new businesses due to a feeling of isolation. 	<ul style="list-style-type: none"> - Provide Quebec City with STOL services. - Transport Canada to cooperate w/ DRIE and Quebec Chamber of Commerce to ensure region is adequately serviced. - Long term strategies required for industrial expansion. 	<ul style="list-style-type: none"> - Renewed tourism and convention business. - Favorable conditions for growth in industrial and commercial sectors. - Attraction of branch offices - Attraction of manufacturers in high tech. industries and others associated to primary sectors, re. aluminum steel/ferro-alloys electro-chemicals.

TABLE 9

SUMMARY OF ISSUES — REGION QUEBEC LOCATION QUEBEC CITY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Marine</u> (freight)	Inadequate	Rates Capacity Status	<ul style="list-style-type: none"> - M.F.R.A. does not take into account mileage for establishing rates and thus renders Quebec Port uncompetitive with respect to containers. - Expansion required to meet increased demand for grain shipments overseas. - Status of base port must be retained to ensure rates remain competitive with other Canadian and American ports. - Lack of strategic planning. 	<ul style="list-style-type: none"> - Loss of business pertaining to container shipments to other ports. - Inability of region to take advantage of its strategic location, re. 12-month accessibility and without need for ice breakers. - Inability to sell region in light of port facilities and low cost for electricity. 	<ul style="list-style-type: none"> - Canadian Transport Commission to look out for disparities in tariffs established under M.F.R.A.. - Strategic planning required by DRIE and other government authorities. 	<ul style="list-style-type: none"> - Increased traffic and improved accessibility. - Favorable conditions for industrial expansion.
<u>Marine</u> (business tourism)	Very low priority					

TABLE 9

SUMMARY OF ISSUES -- REGION QUEBEC LOCATION QUEBEC CITY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Road (specific to automobile and truck)	Inadequate	Accessibility Transit Time	<ul style="list-style-type: none"> - Traffic restricted by and large to Trans-Canada Highway. - Need better access to U and North Shore of St. Lawrence between Quebec and Montreal. Also access to asbestos region. 	<ul style="list-style-type: none"> - Increased transit time, higher truck rates. - Negative impact on regional development in terms of tourism as well as commercial and industrial expansion. 	<ul style="list-style-type: none"> - Review potential for tandem trailers. - Complete construction of north shore auto route. - Consider construction of major highways to U.S. border and asbestos region. 	<ul style="list-style-type: none"> - Lower rates. - Improvements would make region more interesting for industrial expansion. - Open up markets for products presently manufactured in area which are sensitive to transportation costs. - Open up new markets for local carriers leading to increased volume and lower rates.

TABLE 9

SUMMARY OF ISSUES -- REGION QUEBEC LOCATION QUEBEC CITY

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Bus (passenger)	Adequate	Frequency Rates Transit Time	- Response from local businessmen.	--	- New coaches 102 inches in width for passenger comfort.	- Improved quality of service to passengers. - Industrial expansion/increased business for local coach manufacturer.
Rail Freight	Adequate	Rates Equipment/ Availability	- Response from regional users.	--	--	--
Rail Passenger	Inadequate	- Comfort - Transit time - Access to downtown Quebec City area.	- Accessibility of region to businessmen and tourist.	- Feeling of isolation - Decreased tourist business. - Service not considered by business.	- Consideration given to northern corridor. - Equipment modernization re: L.R.C. - New facilities in downtown core.	- Decrease transit time. - Renewed interest by tourist and business sectors. - Increased industrial activity - re Bombardier which is a local manufacturer of L.R.C.

TABLE 10

SUMMARY OF ISSUES -- REGION NEW BRUNSWICK LOCATION MONCTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u> Freight	Very Inadequate	Frequencies; Connections; Equipment.	Aircraft serving Moncton too small and too slow for transporting fresh fish products; Indirect routes to central Canada and the U.S. stifle fresh commodity movements.	Fish industry unable effectively to compete in market for fresh products.	Deregulation of airline industry	<u>Benefits:</u> Greater competition resulting in better services and more appropriate <u>Costs:</u> Possibility of service reduction to small communities.
		Rates	Nova Scotia allowed better rates than New Brunswick.	New Brunswick exporters incurring competitive disadvantage	Steps to encourage greater responsiveness among region airlines. Better alignment of costs and rates	<u>Benefits:</u> as described above. Higher exports
Business/ Tourism	Very Inadequate	Frequencies; Connections; Roundaboutness.	Wide-spread complaints from businesses within and outside region that business travel from Moncton to other parts of the region (including other Maritime provinces) is far too time consuming.	Business dissuaded from locating in the area. Existing businesses are leaving or contemplating leaving.	Steps to encourage greater responsiveness among regional airlines.	<u>Benefits:</u> Attraction of business and reduction in outward flow of business.

TABLE 10

SUMMARY OF ISSUES -- REGION NEW BRUNSWICK LOCATION MONCTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u> (con't)	Very Inadequate	Frequencies; Connections; Roundaboutness	Difficulty attracting tourists because of poor connections to other parts of the region.	Tourism generating fewer economic benefits than would otherwise be available to the region.	Steps to encourage greater responsiveness among regional carriers.	Growth in industries related to tourist activity.
<u>Road</u> Truck	Very Inadequate	Competition among Motor Carriers	Trend toward concentration, whereby small independent carriers are being purchased by a few large trucking companies and railroads.	Loss of transportation efficiency for all sized businesses and industries who depend on common carriers for transportation Deteriorating responsiveness among motor carriers to small shippers in particular.	Deregulation of controls over entry into the trucking business. Also encourage uniformity in regulation between (at least) the Atlantic provinces.	More in number and more responsive motor carriers, helping regional industries to overcome their inherent geographical disadvantage.
		Rates	Use of Tariff Bureaux by many large carriers.	Common rate level for all member carriers resulting in higher than necessary rates, transportation costs.	Deregulation	Help to industry in overcoming inherent geographic disadvantage.

TABLE 10

SUMMARY OF ISSUES -- REGION NEW BRUNSWICK LOCATION MONCTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Road</u>		Highway Spring Weight Restrictions	Fish, lumber, peatmoss, fertilizer and other "Spring Demand" commodities forced to reduce shipments and incur transportation cost penalties.	Producers pre-sell advance orders assuming full loads; must then ship at 60% of full load and absorb cost of additional runs. Can result in late delivery and cancellation of sales.	Reduce restrictions. Feeling is that road beds suffer less from ice lenses than from vehicle miles operated and that latter are fairly low in the Maritimes.	Sharply reduced transportation costs; better on-time delivery of commodities resulting in greater sales.
		Lack of 4-lane highway structure	Lack of 4-lane highways means that inefficient truck equipment being used in New Brunswick.	Lack of 45' double trailers in New Brunswick means that consumers unable to ship as inexpensively as they could otherwise.	Recognition that 4-lane construction very difficult to justify economically.	N/A
Bus		Reefer Service	Shortage of reefers for goods needing temperature control.	Requires some shippers to purchase own equipment.	No options identified.	
Freight		Adequate	N/A	N/A	N/A	N/A
Business/ Tourism		Inadequate	Lack of charter services to outlying areas.	Loss of potential tourist trade.	No options identified.	N/A

TABLE 10

SUMMARY OF ISSUES -- REGION NEW BRUNSWICK LOCATION MONCTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Road</u>						
Auto-mobile	Adequate	--	--	--	--	--
<u>Rail</u>						
Freight	Very Inadequate	Branch lines	Deterioration has reduced weight-bearing capacity to one-half the mainline standard.	"Intollerable" service and rates for industries on branch lines.	No options identified.	N/A
		Equipment	Railroads allocate equipment so as to maximize revenue -- causes equipment shortages in geographically peripheral regions, especially Atlantic Provinces.	Difficulty moving bulk commodities to market in most efficient (and thus least-cost) equipment.	More sensitivity to regional development needs within publicly owned railroads. "Lazor" train. Greater cooperation between railroads and trucking firms. Better intermodal facilities.	More efficient, less costly rail movements for bulk commodities. Greater flexibility in use of available transport modes.
		Small Shippers	Railroad rates uncompetitive: Railroads appear to have "lost interest" in this market.	Virtual loss of major transportation competitor for small shippers.	No options identified.	N/A

TABLE 10

SUMMARY OF ISSUES -- REGION NEW BRUNSWICK LOCATION MONCTON

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Marine</u>						
Freight	Inadequate	Rate Equalization Policies of Conference Lines	Conference lines maintain freight rates to and from Halifax and Saint John on a parity with ocean rates to and from St. Lawrence ports.	Lessens opportunities for Maritime exporters to exploit their natural geographic advantages.	Require lower ocean rates to and from the Atlantic ports versus St. Lawrence ports (for shipments moving on local "Saint John" or "Halifax" bills of lading.	
		Loyalty oaths	Conference system clients must sign a loyalty contract to use only the conference line.	Inability of exporters to balance the power of the conference system.	Diminish loyalty requirement to 80% of total volume shipped.	Development of alternative carriers outside conference system.
	Inadequate	Ports/port policy	Trend toward concentration of major container services at Montreal. Trend stimulated by federal government "provision of navigational services on St. Lawrence free of charge".	Diminishes service to Atlantic ports. Could lead railroads to concentrate their services at Montreal, to detriment of Atlantic ports.	User fees for navigational aids, icebreaking and dredging on the St. Lawrence.	Would make the ports in Atlantic Canada more economically attractive.
Freight Forwarding	Inadequate	Availability	"Virtually no freight forwarding services available".	Shippers probably not finding the best rates.	Stimulation of more freight forwarders in area through special incentives.	Lower rates for shippers.

TABLE 10

SUMMARY OF ISSUES -- REGION NEW BRUNSWICK LOCATION MONCTON

MODE/ DISCUSSION ISSUE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Other Federal Policy	Federal Resource management and Regional Development Policies in Conflict	Envelope System	Inclusion of "constitutional obligations" in the "envelope" for each Atlantic Province.	"Constitutional obligations", through freight rate subsidies and other means, are comprized through their inclusion the envelope system of trade offs.	Fund "constitutional" and discretionary programs separately.	Help Atlantic Provinces overcome the barriers of distance and scattered markets.
	Potentially Inadequate	Freight Rate Assistance program	Danger of further cuts, or elimination of intra-regional subsidies.	If assistance were cut or terminated, production at Atlantic region plants would be diverted to other locations closer to the major markets.	No further cuts in intra-regional program.	Program would continue securing additional industrial development.
	Federal objectives regarding Investment and Regional Development in Conflict	User fees	Trend towards full cost recovery as an investment criterion for infrastructure facilities.	Results in fewer facilities in the region than actually needed and justifiable.	Do not use full cost recovery as sole criterion for public capital investment.	More needed infrastructure development.
	Federal Marine and Regional Development Policies in Conflict	Coastal Shipping Policy	Duties on foreign vessels used when no Canadian alternative is available.	Duty adds to the cost of transport "while doing nothing to enhance the growth and development of Canadian shipping.	Reduce or eliminate the duty.	Lower marine shipping rates.

TABLE 11
 SUMMARY OF ISSUES — REGION NOVA SCOTIA LOCATION HALIFAX

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u>						
Freight	Little comment					
Business/Tourism	Very Inadequate	Connections with United States	Poor North-South route structure and connections.	Generally poor North-South service restraining trade, development and tourism.	Deregulation	Benefits: attract U.S. carriers and new entrants. Costs: could hurt small commuters in region.
		Connections with Europe	Not enough flights to Europe.	Discouraging the development of secondary industry, particularly related to off-shore (because business people wary of poor connections).	Deregulation	Benefits: attraction of European carriers. Costs: could hurt Canadian airlines.
		Connections to other Atlantic provinces	No service at all to most parts of region, such as Northern New Brunswick. Air serving only major centers.	Detriment to regional development. However, some felt that transportation should not be a "social service" to small communities.	Deregulation	Benefits: attraction of "air taxis" etc. Costs: Even less service than today.
<u>Road Truck</u>	Inadequate	Regulation	The region (Nova Scotia generally) suffers "the worst of both worlds" by imposing the costs of a regulatory burden without regulating the rates carriers may charge".	Regulatory costs are passed on to the shipper.	Introduce either deregulation, or rate regulation.	Rates at competitive levels.

TABLE 11
SUMMARY OF ISSUES -- REGION NOVA SCOTIA LOCATION HALIFAX

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Road (con't)			Burdensome licensing procedures	Small operators can't afford the process of obtaining licence: Results in less competition.	Ease licensing regulations	Lower motor carrier rates through competition.
		Tariff Bureaux	Fixed rates hold transportation costs above competitive levels.	Higher transportation costs	As above	As above
		Concentration	General "disappearance" of the small LTL shipper. Heavy reliance on "gypsies" to serve small, outlying communities.	Gradual monopolization by railroads and high transportation costs.	As above	As above
		Non-Uniformity of Interprovincial Regulations	Non-uniformity extends to Bills of Lading; maximum weight configurations, exemptions from regulations and issuing of licences.	Inefficiency in interprovincial trucking operations.	Greater uniformity across the Atlantic Provinces.	Less costly, smoother interprovincial trucking operations.
		Uniformity of interprovincial weight restrictions	Non-uniform weight restrictions between Atlantic Provinces	As above	As above	As above
Bus Freight Business/Tourism	Inadequate	Uniformity of Interprovincial regulations	Bus operators licensed in Nova Scotia not allowed to cross provincial borders.	Diminishes tourism -- operators can't offer "Maritimes" tours. Also results in loss of business to U.S. operators, who can offer charters throughout	Joint licensing	More tourism especially for Canadian operators.

TABLE 11
SUMMARY OF ISSUES -- REGION NOVA SCOTIA LOCATION HALIFAX

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
Road Auto- mobile	Reasonably Adequate Conditions					
Rail Freight	Inadequate	Reliability	Many manufacturers need to place reservations some 3 weeks ahead to use rail services.	Diminishes Competitiveness of regional producers.	Strengthen CN's commitment to regional development. Expand freight forwarder's pool car services now in operation between Toronto and Halifax for furniture manufacturers.	Greater ability to compete with central Canadian producers. Improve rails competitiveness with road. Better rate structure than CN or truck. Reduced damage ratio.
		Competition	For anything west of Ontario "CN is the only available rail-road" for piggyback movements.	Inflexibility in shipping sea products and other commodities.	Convey trackage rights to CP.	More competitive rates and better services.
		"Creaming"	CN restricting its operations to only the 'cream' markets (Halifax, Moncton, etc.) -- Offering very poor service to Amhurst and other small communities.	Inadequate and expensive rail service for small, outlying communities.	Strengthen CN's commitment to regional development.	More balanced regional growth.
		Predatory Pricing	CN said to be undercutting private motor carriers on rates to obtain larger market share.	Fear is that CN will gain monopoly power over rate making and service levels.	No specific solutions.	

TABLE 11
SUMMARY OF ISSUES -- REGION NOVA SCOTIA LOCATION HALIFAX

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Rail</u>		Infrastructure	Track follows same route as it did in 1890.	Circuitous routing: many derailments. CN wants to extend "Lazor train" to Halifax from Toronto but infrastructure may prevent.	Repair and Restoration	More efficient service
		Abandonment	No consultation between CTC and the Province	No alternative arrangements available for affected shippers.	Formal consultation machinery.	More say for the Province over the abandonment impacts
<u>Business /Tourism</u>	Inadequate	VIA Rail	Very poor baggage handling. Recent service cuts.	Some reduction in tourism	Participants reluctant to suggest improvements since only 3% of passenger traffic uses rail anyway.	
			Lack of passing track.	Creates difficulties in scheduling passenger runs. Increased derailments.	Upgrading	Better passenger services.
<u>Marine Freight</u>	Very Inadequate	Activities of Conference Lines	Recent reduction in non-conference shippers from 3 to none.	Conference lines have shown tendency to raise rates sharply for frozen commodities.	Study the merits of removing current exemption from the Combines Act for conference lines (SCEA).	Possible increase in number of competitors.

TABLE 11
SUMMARY OF ISSUES -- REGION NOVA SCOTIA LOCATION HALIFAX

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Marine</u>	Inadequate	Container Ports: Intermodal Acquisitions	CNR holdings in the East Group.	Viewed as potentially creating an untenable situation for shipping interests in Canada, particularly for Halifax, (because CN only rail link to Central Canada and mid-west U.S.	Divestiture (implied only)	More competition. More lines calling at Halifax.
		User Fees	Free use of St. Lawrence Seaway.	Seaway subsidies detrimental to rail transportation -- rail must pay for its use of right-of-way.	User fees on St. Lawrence.	Move efficient allocation of freight between marine and rail.
<u>Business /Tourism</u>	No concerns raised					
<u>Freight For-warding</u>	Inadequate	Conference Lines	Lack of competitors with conference lines in ocean shipping.	Freight forwarders find they cannot get good rates and connections for Nova Scotia and other Maritime shippers.	Establish an international control body to oversee conference lines.	More competition, better rates, better service.
		Public Warehousing	Shortage of refrigerated warehouses and other public warehousing.	Discourages use of Maritime ports, making freight forwarding less effective.	Federal subsidies for public warehousing.	Would encourage more manufacturing in region and more use of Maritime ports.

TABLE 12

SUMMARY OF ISSUES -- REGION NEWFOUNDLAND LOCATION ST. JOHN'S

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Air</u>						
Freight	Inadequate	Rates	Too costly for everyday use.	Use of slow modes.	Deregulation	Better service and rates through more competition.
		Speed	Shipments taking up to five days to get to Newfoundland from central Canadian origins.	Unreliability	As above	As above
		Bumping	Newfoundland-bound shipments being bumped at Montreal by goods moving to other locations	As above	As above	As above
Tourism/ Business	Inadequate	Availability	Difficulty of getting seats to Labrador without about 10 days advance reservation.	Poor connections with Labrador for business and tourism.	None suggested	
<u>Road</u> <u>Truck</u>	Inadequate	"Predatory" Competition from rail.	Competition from Terra Transport.	Many trucking companies being driven out of business in Newfoundland by Terra Transport (CN) through competition for base loads in truck load operation.	Government should require that Terra increase its rates.	Reshape proper balance between truck and rail modes.
Bus Freight Business /Tourism	Inadequate	Coordination between Companies/ Schedules/Inter- lining	No information about schedules available.	Inefficiency, lack of use, high cost.	Better information dissemination.	More use of system.

TABLE 12

SUMMARY OF ISSUES -- REGION NEWFOUNDLAND LOCATION ST. JOHN'S

MODE	ADEQUACY RATING	SUBJECT	BASIS OF RATING/COMMENTS	"COST" OF INADEQUACY	SUGGESTED CHANGES	
					OPTION/SOLUTION	EXPECTED BENEFITS AND COSTS
<u>Road</u> Auto- mobile	Inadequate	Safety; Speed	Lack of paved highway shoulders and deferred maintenance.	Many use boat instead of road, thus wasting time.	More federal aid for highway improvements.	Improved tourism, greater safety and higher speeds.
		Infrastructure	Poor links between the major urban and peninsula centers in Newfoundland.	Inefficient transportation system generally.	Upgrade existing links, and provide shorter ones.	Fewer delays/greater regional competitiveness.
<u>Rail</u> Freight	Inadequate	"Pricing"	Government subsidy to Terra Transport.	Causing rail to capture too much direct water and truck business.	Reduce subsidy to CN or otherwise cause it to increase rates.	More efficient balance between modes. More competition. Lower rates.
<u>Marine</u> Freight	Inadequate	Terra Transport	See above			
	Adequate but inefficient	Coastal Services	Not enough competition.	High rates.	None stated.	
<u>Business</u> /Tourism	Very Inadequate	Ferry Services	Very poor accomodation for passengers and poor service at terminals.	Sharply diminishing tourism.	Upgrade service; upgrade terminals; restore North Sydney-Argentia service.	Sharply increased tourism.

