

The State of North Carolina has initiated the development of the *North Carolina Maritime Strategy* to serve as an open evaluation of North Carolina's position, opportunities and challenges as a portal for global maritime commerce. The study will examine the role that North Carolina ports play in sustaining and strengthening the State's economy, and identify specific strategies to optimize benefits received from the State's investments in port and associated transportation infrastructure. The *North Carolina Maritime Strategy* is being prepared as the expansion of the Panama Canal nears its scheduled 2014 completion, and the United States recognizes the increasing importance of exports to national and regional economic growth.

The *North Carolina Maritime Strategy* will frame the connections between maritime goods and economic development in North Carolina through the following primary activities:

- Facilitated collaboration of freight transportation, economic development and community interests as input to the statewide strategy;
- Definition of North Carolina's economic context and maritime market positioning strategies that would offer the greatest economic benefit to the State; and
- Identification of infrastructure investments and policies that would most significantly enhance North Carolina's economy through improved performance of the State's maritime gateways and related trade corridors.

The study will be performed under the leadership of a Maritime Study Executive Team that includes the Lieutenant Governor, the Governor's Senior Advisor, Secretary of Transportation, Secretary of Commerce, and Secretary of the Environment and Natural Resources. An Advisory Council will comprise State officials and staff, along with industry representatives from ocean shipping, trucking, rail and manufacturing interests, as well as community-at-large representatives.

Ongoing efforts of the Governor's Logistics Task Force will be an important input to the *North Carolina Maritime Strategy*. Strategy development will therefore be coordinated and aligned with related work by the Governor's Logistics Task Force, its findings and recommendations. To make best use of past efforts and existing information, the *Strategy* will review and augment prior studies prepared by the North Carolina State Ports Authority, the North Carolina State University Institute for Transportation Research and Education (ITRE), educational institutions and the Lieutenant Governor's Office. It should be emphasized, however, that this study is taking a new look at North Carolina's maritime needs and will only incorporate information from previous studies as appropriate.

Broad-based stakeholder outreach is paramount to successful development of the statewide maritime strategy. A comprehensive and ongoing public involvement program will engage the public, agencies and other stakeholders through a series of informational meetings, public workshops and focused discussions with industry, as well as environmental and community groups.

The *North Carolina Maritime Strategy* will define maritime market scenarios in which the State could realize economic and public benefit. Opportunities to be explored will include those associated with import and export of containerized cargo, as well as the potential for expanded bulk, breakbulk, petrochemical and military cargos. Special emphasis will be made to link potential market positions with industry in the State. The range of market position alternatives to be investigated may include regional transshipment of goods, container-on-barge service and major international container terminal operations.

For each viable market scenario, the *Strategy* will define its infrastructure needs. Transportation investments to be examined may include reconfiguration or modernization of existing port facilities, new terminal developments, wharf and channel improvements, road and rail connections, and inland intermodal facilities. A comparative analysis of development alternatives will be conducted to measure the relative benefits, effectiveness and costs associated with various alternatives for market positions and associated infrastructure.

The *North Carolina Maritime Strategy* will provide the State of North Carolina with a decision matrix for evaluating port investments, within and across modes, to achieve economic objectives. Final recommendations will identify long- and short-term investment strategy for a more efficient, effective and safe movement of port products.