Executive Summary

The Strait of Canso Superport Corporation Limited (SCSCL), with funding partners Enterprise Cape Breton Corporation, Nova Scotia Department of Economic & Rural Development, Municipality of the District of Guysborough and the Municipality of the County of Richmond, have partnered to create a unified port master development plan for the Strait of Canso region. The primary goals of the master development plan consist of the following major themes:

- Determine the best form of future port governance
- Develop a realistic market analysis to identify potential terminal opportunities
- Identify potential development sites suitable for terminal development
- Provide a long range vision plan for future expansion of port assets

The master development plan will act as the guideline for future marine operations and expansion in the Strait of Canso region over the next 20 years. The heart of the study was to evaluate the necessary form of port governance required to create a focused marine leadership entity to market the port assets, expand terminal operations and advance the port as the Atlantic Gateway port of choice. The new leadership structure is envisioned as a symbiotic relationship between port management, private terminal operators and local and provincial government stakeholders. The master development plan will act as a guide to make decisions for the entire region.

Report Format

The master development plan includes an inventory of existing terminal assets, overview of existing infrastructure, detailed market analysis, identification of potential deep-water terminal development sites and a broad based implementation program. The report is organized into the following sections:

Executive Summary
1. Introduction
2. Existing Conditions
3. Port Governance
4. Market Analysis
5. Strategic Marketing Plan
6. Potential Terminal Development Sites
7. Preferred Terminal Development Sites
8. Preferred Site Development Considerations
9. Future Terminal Needs Based on Potential Market Opportunities
10. Planning Level Rough Order of Magnitude Cost Estimate
11. Master Plan Implementation Program

The report is organized to reflect the planning process used to create the master development plan. The study started first by reviewing the existing conditions, followed by understanding the market conditions, and once the potential market opportunities were developed, the study focused on evaluating potential terminal development sites for future port expansion. The report also includes a detailed discussion on future port governance options and an implementation program. The following discussion provides an overview of the contents included in the report sections.

The Introduction section provides a background on the purpose of the study, study approach and methodology, focus of the study area, description of the general port setting and jurisdictional boundaries. The Existing Conditions section of the report identifies the public and private terminals, and provides an overview of the regional access and utility infrastructure. The Port Governance section provides a background on the federal port divestiture program, history of the creation of SCSCL, provides an evaluation of options for future port governance, and recommends that SCSCL continues pursuing Canada Port Authority (CPA) status.

The Market Study section discusses the approach and methodology associated with the market analysis, identifies the key markets for Canada by region and import/export trade lanes, and discusses potential markets that could be served by the Strait of Canso. The Strategic Marketing Plan provides a program to target future studies and identifies key terminal operators and shipping lines for development of terminals to serve the potential market opportunities in the Strait of Canso.

The Potential Terminal Development Sites section evaluated potential sites that could be explored for future terminal construction. The Strait of Canso region is characterized by low rolling hills and steep hillside conditions with limited flat terrain adjacent to the waterfront. In addition, much of the readily available flatter terrain has been developed with marine related industrial uses. This section of the report details the efforts to evaluate the natural deep-water areas, identify areas located near sea level, and assess the steepness of the slope areas. The Preferred Terminal Development Sites identifies the four potential development sites available for future port expansion, along with the potential marine land uses appropriate for each site based on the terminal requirements and site characteristics. The Preferred Site Development Considerations discusses the natural resource constraints associated with each of the preferred sites, along with zoning and land ownership considerations that need to be addressed during development of the sites.

The Future Terminal Needs section identifies the physical improvements required to operate each terminal, including wharf configuration, number of berths, cargo conveyance method, cargo storage methods, terminal size and other terminal attributes used for development of the cost estimates. The Cost Estimating section provides a rough order of magnitude cost estimate for each type of terminal identified in the market analysis to meet the potential market opportunities.

The Master Plan Implementation Program provides an overview of the actions necessary to implement the recommendations of the study. Discussions are provided for the following areas: governance structure, port marketing strategy, immediate terminal opportunities, long-term terminal opportunities, and potential developer attraction efforts to promote investment.

Overview of the Recommendations of the Master Development Plan

The following discussion provides an overview summary of the recommendations and objectives outlined in the plan. The Executive Summary is not intended to document the entire technical study, and instead focuses on the relative findings and recommendations. Further detailed analysis, information, and other factors used to support the final recommendations are provided in the relative technical sections of the report.

The Executive Summary is provided to present the major findings and recommendations of the study. The Executive Summary overview provides the relevant findings and recommendations contained in the report from the relevant chapters. The overview of the study recommendations are organized into the following order:

- Port Governance
- Management of Publicly Owned Lands
- Potential Market Opportunities

- Strategic Marketing Program
- Preferred Terminal Development Sites

The individual discussions provide a cursory review of the detailed materials contained in the report. The discussions are followed by goals necessary to implement the concepts provided in the summary. The recommendations and goals of the master development plan are contingent upon SCSCL attaining a governance structure with a source of revenue. In addition, further discussions are necessary with the municipal and provincial governments to establish the preferred regional marine leadership roles. Likewise, future land management decisions will require continued involvement of all stakeholders, especially Nova Scotia Business, Inc. (NSBI).

Port Governance

The SCSCL is in the process of exploring new port governance options to facilitate regional marine leadership within the Strait of Canso. This leadership role is not anticipated to dictate future decisions in the port, but rather act as a consensus builder between the various stakeholders to provide future direction and a local voice to the future development and operation of the port. This master plan is a step in that direction by providing a guideline to identify potential market opportunities and land use suggestions for the future development of the port. The SCSCL Board and other master plan stakeholders have identified four primary governance issues to address in the port master plan. The primary governance issues are listed below:

- What is the best governance structure to access the Harbour dues for local reinvestment?
- What is the best governance structure to market the Strait of Canso?
- What is the best governance structure to implement and advance the recommendations of the port master plan?
- What is the best governance structure to facilitate development of the publicly owned land in the Strait of Canso?

SCSCL is the logical entity to lead the evolution of a new port governance structure for the Strait of Canso.

Since adoption of the Port Divestiture Program, there has not been a strong marine leadership presence in the Strait of Canso. Much of the port's continued success and cargo growth is attributed to organic growth due to the port's regional location in North America, sheltered harbour conditions, year-round ice-free operations, significant deep water and abundant industrial waterfront land areas. The SCSCL Board and other surrounding municipalities see a need for regional leadership to help the port grow, attract new developer interests, provide a focused vision for the future development, and act as the regional marketing arm for the Strait of Canso. Since inception, SCSCL has operated in this capacity to promote the Strait of Canso's public and private terminals for the benefit of the entire region. They have also worked with the Province and local municipalities to attract private marine development to the region.

Under the Canada Marine Act, Transport Canada and Canada Port Authorities (CPA's) are the only agencies authorized to collect Harbour dues. The Federal government originally mandated the Harbour dues for the operation and on-going maintenance of federally owned marine assets. The Harbour dues collected in the Strait of Canso by Transport Canada are significant. In the 2008/2009 fiscal year, approximately $1.2 million in Harbour dues were collected in the port. SCSCL and other regional governmental agencies feel that these fees should be re-invested in the region for an international marketing program to promote trade, maintain existing marine assets, stimulate the creation of new terminal facilities, and other efforts to expand domestic and international trade through the Strait of Canso region.

In 2007, SCSCL made application to Transport Canada to be considered as a CPA. Transport Canada has not approved or denied the application and there is continued dialogue between SCSCL and Transport Canada. A considerable amount of discussion and negotiation remains to be undertaken before CPA status can be granted to the Superport Corporation. However, as one of Canada's largest tonnage ports it is important that SCSCL continue the process to become a CPA. This would place the Strait of Canso Port on a level playing field with other CPA ports that have control of and revenue from their respective Harbour beds. The revenue from Harbour dues is essential to market and develop the Strait of Canso.

The combined marine terminal facilities in the Strait of Canso region have become major players in the national and international market place. Cargo tonnage through the Strait of Canso has rivaled other ports throughout the country for numerous years and has continued to grow. Since 2005, the amount of cargo handled at the Strait of Canso Port per year has been over 30 million tonnes. The cargo base is lead by liquid bulk petroleum products, non-metallic minerals, and aggregate products. In addition to the existing cargo base new major terminals, such as a LNG import terminal and international container terminal, would significantly increase cargo throughput and diversity in the region. The existing and future terminals place the Strait of Canso Port as an important player in Canada's Atlantic Gateway for international trade in North America.

The future success of the Strait of Canso Port is based on seeking designation of CPA status. CPA status will provide the funds necessary to market the port facilities internationally, maintain existing facilities, attract developer interests to the region, expand port facilities, enhance cargo throughput and implement the goals of the port master plan as a focused vision for the future. These additional funds could come from the collection of Harbour dues and the borrowing mechanisms available to CPA's.

For the reasons stated above, modification of the port status to CPA is the preferred organizational structure to continue to operate and expand the marine facilities in the Strait of Canso. The Strait of Canso Superport Corporation is open to suggestions from Transport Canada on a new model that would achieve these same goals. However, in the absence of another defined model discussions should begin around a CPA. The Port Master Plan will provide the framework for on-going discussions with Transport Canada and illustrate the port's commitment to growth. This process will require a considerable amount of time and further negotiations with Transport Canada.

Conversion to CPA status will allow the port to attract additional world-class international terminals and industrial manufacturing to the region to enhance trade. A set of governance goals has been developed by SCSCL to maintain the organizational vision desired for the future. Governance goals for the Strait of Canso include:

- Provide focused marine leadership for the region
- Implement a focused domestic/international marketing strategy
- Guide future development and expedite approval process
- Increased regional trade through development of new marine terminals
- Long-term viability and funding for facility maintenance and future expansion
- Identify possible funding sources for the expanded role
- Implement the recommendations of the port master plan

Attaining CPA status is critical to achieving these goals.

GOAL 1 SCSCL will continue negotiations with Transport Canada to attain status as a CPA.
GOAL 2 SCSCL will approach Enterprise Cape Breton Corporation for funds to negotiate and implement the new governance structure.

Management of Publicly Owned Land

The master development plan provides a framework for assessing potential future terminal development in the Strait of Canso region. Key parcels have been identified that are suitable for future terminal development based on site characteristics, adjacent deep-water and terminal development requirements. Selection of these sites and the development criteria are discussed in the relevant technical studies of this report.

Much of the available industrial land located along and adjacent to the Strait of Canso is publicly held by the local municipalities and various provincial governmental agencies. This creates multiple levels of bureaucracy that may be involved with possible land transactions and private developers. In addition to the multiple agencies involved in reviewing developer proposals, there is a lack of coordinated effort focused on marketing the marine assets in the Strait of Canso for future terminal development. Attraction of potential terminal developers in the Strait of Canso has suffered from this lack of focused local leadership.

In addition to attracting initial developer interest to the region, it is difficult for potential developers to work through the various governmental agencies involved with assessing the land use proposals, transferring land, obtaining permits and collecting information. A local centralized entity could improve the process by acting as the key point of contact for the remaining industrial waterfront parcels in the Strait of Canso.

Creation of a local entity responsible for marketing and managing the potential terminal sites would lead to an accelerated development program and enhance job creation and cargo throughput in the region. Creation of a leadership role for the disposition of waterfront property will also help facilitate implementation of the master development plan.

Another option includes transfer of the key marine parcels to a local entity for focused redevelopment. Similar efforts have been completed in other areas of Nova Scotia to provide more local control over disposition of Crown lands. A specific example of the province transferring Crown land to a local municipality includes redevelopment of a former military base at the Debert Industrial Park.

SCSCL is the agency best suited to lead the discussions on the management of the available industrial waterfront parcels in the Strait of Canso. The SCSCL Board represents a cross section of all stakeholders in the region including involvement of the shipping community, municipal governments, and provincial and federal government.

GOAL 3 SCSCL will lead negotiations for the transfer of management for key provincially owned water front land parcels identified for possible terminal development to a local entity for future developer attraction.

GOAL 4 SCSCL will initiate discussions with the Province of Nova Scotia to investigate the possible transfer of key waterfront Crown land that are identified as potential terminal development sites to a local entity.

Potential Market Opportunities

The market analysis determined the historic cargo trends for national and regional marine traffic. This approach identified all cargo flows through Canada and then focused on the percentage allocation to each region and port to evaluate existing cargo trends applicable to the Strait of Canso region. The market analysis assessed cargo through the private and public terminals. Containerized cargo was not a focus of the market analysis as a detailed analysis has been previously performed for the Maher Melford Terminal (container terminal) partners as a part of their permitting process.

Non-containerized import commodities through the Strait of Canso region are lead by crude oil followed by gasoline/jet fuel and coal. Furthermore, the majority of the imported non-containerized cargo is handled at the private terminals within the Strait of Canso. Non-containerized imports through the region are driven by trade with Africa; Northern European imports have been declining, while Mediterranean sourcing has increased.

Cargo exports through the Strait of Canso region shows strong growth. Crude oil exports are the dominant non-containerized export cargo via the Strait and have been growing strongly since 2002. This export trade is predominately with the US marketplace.

Overall, non-containerized imports through all the Canadian ports have grown at 3.6% annually, while the regional ports of interest, including the ports of Quebec, Strait of Canso, Saint John, Sydney, Montreal and Halifax, have experienced a 3.2% growth annually since 2000. With respect to the regional ports of interest, Quebec is the leading port for non-containerized imports, overtaking Saint John and Strait of Canso since 2005. Crude oil, coal and metallic ores are the key commodities of import via all Canadian ports, but crude oil dominates the non-containerized imports into the regional ports. Northern Europe has historically been the dominant source of imports of non-containerized cargo into the regional ports, with the Mediterranean and Africa growing in importance. Africa is the major source of non-containerized imports into the regional ports, primarily driven by crude oil imports.

Canadian exports of non-containerized cargo have grown at about 3.8% annually since 2000, while non-containerized exports from the regional ports of interest have grown at 5.4% annually over the same time period. The Strait of Canso dominates the non-containerized exports from the regional ports. Coal, ores and minerals are the dominant export cargoes for all Canadian ports, but crude oil and fuel oil are the major non-containerized exports from the regional ports. The United States is the key trading partner.

Continued growth of the existing cargo base is anticipated to be robust following a gradual stabilization of world markets. In addition to the existing commodities flowing through the region, there are opportunities for development of new commodity markets based on pending mining operations in the region as well as possible shifts in logistics trade lanes due to potential economic advantages offered by the Strait of Canso region. These new cargo opportunities consist of the following commodities:

- Export of metallurgical coal
- Dry bulk transshipment terminal serving the Great Lakes region
- Offshore oil field/wind farm support facility

The most immediate market opportunity consists of the potential export of metallurgical coal by Xstrata. The conversion of this opportunity depends upon the ability to barge the coal from the mine location to the Strait of Canso more cost effectively than by transporting the coal by rail to Sydney docks for export internationally. The new mining venture is evaluating this potential barge transfer operation in the Strait. The opportunity presents 2.5-5.0 million tonnes annually of export activity.

An economic assessment was developed for the feasibility to develop a bulk transshipment operation in the Strait of Canso. The concept of a transshipment operation is designed to maximize the water depth available in the region to provide a least cost routing option to consuming industries such as steel operations located at Great Lakes ports with limited water depth. Under the transshipment concept, dry bulk cargo destined for the United States and Canadian Great Lakes ports would be moved via Cape Size vessels into the Strait of Canso, and then moved by smaller Laker class vessels consistent with the limited Seaway depth of 27 feet into the Great Lakes ports for consumption by local industries. Similar options may also benefit the export of cargo from Great Lakes ports through a transshipment terminal with transfer to larger Cape Size vessels.

The logistics cost analysis suggests that transshipment through Quebec is slightly more cost effective than transshipment through the Strait of Canso. Use of a bulk transshipment port at the Strait of Canso is consistently the second most cost effective method to serve the steel and industrial facilities located at the key Great Lakes ports. However, land area for development of transshipment may be more limited at Quebec. Furthermore, on longer Asian routings, the differential between the Strait of Canso and Quebec routings narrows. Given land availability and aggressive pricing, the Strait of Canso may have the opportunity to compete for transshipment cargoes on specific trade routes.

The initial analysis of the transshipment markets through the Great Lakes and the Strait of Canso was assessed on a cursory level. The results of the study indicated that there is a potential opportunity for the Strait of Canso to compete with rail transportation costs associated with existing US East Coast ports. Further detailed market analysis is warranted to identify specific commodities and trade routes. Iron ore and coal commodities represent the higher opportunities for transshipment through the Strait of Canso as well as longer trade routes to regions such as Asia and India.

The third key opportunity is the development of an offshore energy support operation, as well as an offshore wind energy support and manufacturing operation. These opportunities require significant investment in infrastructure and should be pursued with the identified wind energy manufacturers.

Strategic Marketing Program

It is recommended that SCSCL pursue a three-phased marketing program to capture the potential market opportunities. The first Phase of the program should be directed to securing the commodity opportunities identified in the analysis, particularly focusing on the coal export opportunity. This will require continual discussions with Xstrata, focusing on the cost effectiveness of the development of a barge operation from the mine to the Strait of Canso. This will entail contacts with barge operators as well as coordination with a terminal operator at the port. In reality, this focus on a coal export transshipment operation is consistent with the second phase of the market recommendations, which is the development of the transshipment concept and the marketing of this concept to potential terminal operators and investors.

Phase 2 of the marketing strategy involves reaching out to the key shippers and terminal operators involved in these types of facilities to “test the concept”. The next step in the development of a marketing campaign targeted to potential dry bulk transshipment operators/investors is to develop a more detailed market research, including the identification and interviews with the key importers/exporters of dry bulk cargoes at the respective Great Lakes ports. These interviews must focus on an assessment of current logistics patterns now in place (rail vs. direct service), logistics costs, ability to use the Strait of Canso as an inventory control mechanism and transshipment center, seasonality needs, shipment lot size requirements, etc. A documentation of these factors will be required prior to developing a formal marketing campaign to terminal operators/investors.

In addition to developing the more detailed market intelligence on potential transshipment markets, it is recommended that a basic concept plan be developed for the transshipment facility to size the terminal and

develop a rough order of magnitude cost estimate. A detailed market analysis and conceptual plan can be used to market the site to potential operators.

Phase 3 of the marketing strategy involves identification of potential users for a terminal facility to support the offshore oil field and wind farm markets. Although the prospects for developing gas fields have declined due to poor field results and reduced natural gas prices, there is a potential for this market to return as demand for product increases. Construction of a new terminal for oil field support may need to be reevaluated as the market recovers and exploration effort returns to the Canadian North Atlantic region. With respect to the offshore oil and natural gas support base operations, the SCSCL should begin discussions with the offshore oil field industry when the market returns over the long-term horizon.

The market analysis also identified an opportunity to import or export wind mill components as a part of the National Renewable Energy Program in Canada. Generally, the existing terminal facilities in the Strait of Canso do not have adequate lay down/storage area to accommodate the large superstructures involved in wind mill components. If this market materializes new terminal facilities would need to be developed to accommodate the large cargo.

Due to the nature of the design and layout of these facilities with a wharf and large open storage yard, these facilities may be combined with other terminal operations such as offshore energy support facilities. The types of activities could be coordinated to complement each other and expand the use of the terminal facilities.

With Daewoo developing a wind mill component manufacturing facility in Trenton, there is potential for attracting export cargo through this facility as well. Further analysis will need to occur to evaluate competition with other surrounding ports and potential logistic costs. It would be beneficial for the Strait of Canso Port to reach out to Daewoo during the early stages of their facility development.

It is recommended that the three phases of the strategic marketing plan be pursued concurrently, and sequentially. The marketing of the dry bulk transshipment terminal to potential operators and investors will require a more in-depth market assessment of the current logistics patterns of potential users, as well as the development of conceptual plans and order of magnitude costs to support a transshipment operation as well as an Omni bulk port to support local coal and mineral export opportunities.

GOAL 5 SCSCL will continue discussions with the Xstrata coal mining consortium to find a mutual opportunity to capture the coal transshipment operations in the Strait of Canso and eventual development of a regional coal transshipment terminal.

GOAL 6 SCSCL will reach out to key dry bulk transshipment operators to test the proposed terminal concept.

GOAL 7 Based on the results of Goal 6, SCSCL will commission a detailed market analysis and conceptual terminal plan for supporting attraction of a private investor to develop and operate a dedicated or third party dry bulk transshipment terminal.

GOAL 8 SCSCL will evaluate market trends over the short term to evaluate the potential for renewed offshore oil field activity. If the market returns, SCSCL will reach out to the key oil field operators to identify potential terminal requirements.

GOAL 9 SCSCL will evaluate market trends over the short term to evaluate the potential for development of offshore wind farm activity. If the market emerges, SCSCL will reach out to the key wind farm operators and regional wind mill equipment manufacturers such as Daewoo to identify potential terminal requirements.

Preferred Terminal Development Sites

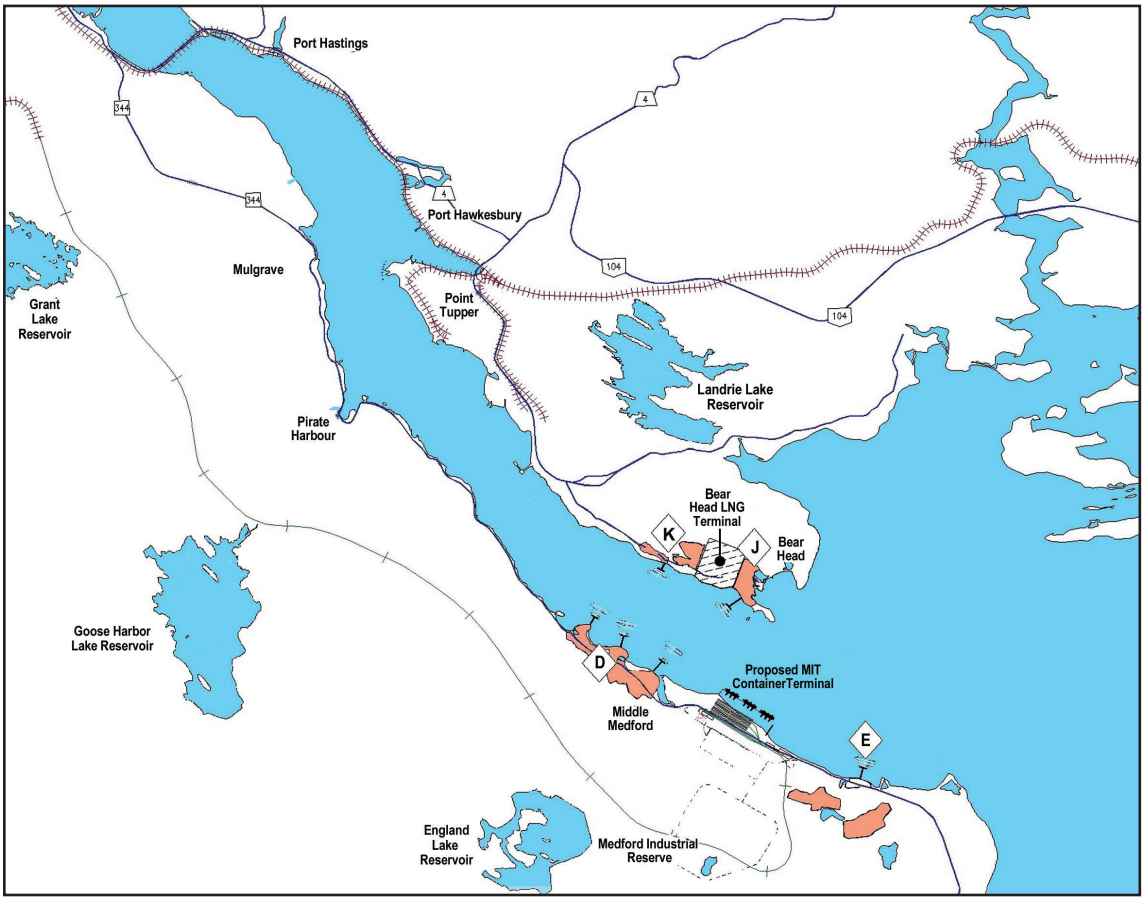
A detailed analysis of the potential terminal development sites was conducted to assess the deep-water locations and site characteristics of the available waterfront parcels within the Strait of Canso region. The analysis included an evaluation of vessel draft requirements, site elevation relative to sea level and a detailed slope analysis to identify flatter terrain and hillside conditions. The analysis also identified areas that were unavailable for development due to existing industrial uses.

The initial analysis reviewed 12 potential terminal development sites. The initial screening process resulted in the identification of four preferred terminal development sites. The details of the evaluation process and findings are detailed in Section 6 and 7 of this report. The following sites were identified as the preferred terminal development sites:

- Site D – Byers Cove
- Site E – Eddy Cove
- Site J – Bear Head
- Site K – Ship Point

Sites D and J are characterized by relatively flatter terrain adjacent to the waterfront. Sites E and K are noted as hillside terrain with flatter portions of land at higher elevations. The general locations of the four preferred development sites are illustrated in Figure ES-1.

Figure ES-1 **Preferred Development Sites**



Sites D and E are located in the vicinity of the Melford Industrial Land Reserve on the mainland, adjacent to the proposed Maher Melford Terminal development site. Sites J and K are located in the Bear Head Industrial Reserve on Cape Breton Island. Further details of each of the specific development sites are included in the technical components of the report.

Site D represents the greatest land asset in the Strait of Canso for future terminal development due to the large contiguous land mass and relatively flat terrain. The site offers approximately 69 hectares of land area and relatively deep water close to shore. Site D can be used for a single terminal activity, or multiple terminals depending on the specific use or area required. Due to the size and flat terrain the following terminal uses have been identified:

Site D	Coal Transshipment Terminal
	General Dry Bulk Transshipment Terminal
	Offshore Oil Field/Alternative Energy Terminal (Optional)

Site E is characterized with a small flat area located close to shore with steep hillsides climbing to flatter terrain at higher elevations above. The site consists of a total land area of approximately 58.0 hectares. The hillside terrain and high elevation storage area makes this site more appropriate for liquid bulk or gas terminal development. Access to tanker level deep water is approximately 325 meters.

Site J is located in the Bear Head Industrial Reserve, adjacent to the Bear Head LNG terminal site. The site offers approximately 22 hectares (54.0 acres) of land area with minimal grading activity. The Handymax class water depths can be accessed at approximately 293 meters off the coast. Site J has been identified as the potential location of an offshore oil field/wind farm support terminal.

Bear Island Road is unpaved as it crosses the LNG terminal site and accesses Site J. Due to potential security issues, this road may need to be relocated in the future to avoid the LNG terminal. There are possible options to relocate the road alignment east of the terminal and tie into roads constructed for the Point Tupper Wind Farm. This will require further coordination with the LNG terminal developers and NSBI to evaluate options and distribute roadway costs.

Site K is located in the Bear Head Industrial Reserve on Cape Breton Island between the NuStar Energy liquid bulk terminal and Bear Head LNG terminal site. The site generally consists of hillside terrain with flatter storage areas at 20.0 to 25.0 meters above sea level. There is a 7.0 hectare area located adjacent to the waterfront, with a 16.0 hectare potential storage area adjacent to the Bear Head LNG terminal site. There is additional flatter area for storage area expansion at 40 meters above sea level on the northern portions of the site. The hillside nature of the terrain with storage areas at higher elevations is best suited to liquid bulk or gas related terminal development. The tanker water depths are available at approximately 250 meters off of the coast.

All four preferred terminal development sites represent critical assets to the future development and expansion of the port. There are limited opportunities for deep-water terminal sites in the Strait of Canso and these areas should be recognized regionally and preserved for future development. As a first step in preserving these assets, SCSCL should coordinate with the province and local municipalities to identify the preferred deep-water terminal sites on the corresponding agency's zoning maps and general plans. This effort may require administrative actions and public hearings to modify the maps and plans.

Preferred terminal development sites D and E are located in the Melford Industrial Land Reserve. The sites include mixed industrial and residential zoning designations, as well as land ownership controlled by the province, municipalities and private ownership. Future terminal development will require re-zoning the parcels to allow for port industrial land uses and potential lot consolidation and acquisition.

Due to the value offered by the large contiguous flat terrain associated with Site D, the plan recommends a focused priority on rezoning this land area and acquiring properties as they become available on the open market. As developer interests are attracted to the site, consolidation and acquisition plans may need to be accelerated.

Site E offers less immediate opportunities for development of a liquid bulk terminal or oil refinery in the short-term horizon. However, the site should be re-zoned and designated for future deep-water port uses with the local agencies.

Sites J and K are located in the Bear Head Industrial Reserve and are entirely owned by NSBI. The parcels are also zoned for port industrial uses. In this case SCSCL will need to coordinate with NSBI to preserve the sites for future deep-water port uses.

GOAL 10 SCSCL should coordinate with the local municipalities and the provincial government to preserve the four preferred terminal development sites as deep-water port expansion areas and designate them on their respective general plan documents.

GOAL 11 SCSCL should initiate discussions with the Municipality of the District of Guysborough to request rezoning of the parcels on Site D for industrial land uses.

GOAL 12 SCSCL should work with government departments and other local municipalities to acquire privately owned parcels within Site D as they become available on the open market. This will require identification of possible funding sources for property acquisition.

GOAL 13 SCSCL should coordinate with NSBI to market the preferred development sites consistent with the terminal recommendations of the master development plan, including:

Site D	Coal Transshipment Terminal General Dry Bulk Transshipment Terminal Offshore Oil Field/Alternative Energy Terminal (Optional)
Site E	Liquid Bulk Petroleum Terminal
Site J	Offshore Oil Field/Alternative Energy Terminal (Preferred)
Site K	Liquid Bulk Petroleum Terminal