

**The Opportunity Cost of Delays in Navigation Projects: A
Case Study of Selected Navigational Projects for Florida
Ports**

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The United States port industry is a key driver of the U.S. economy, supporting nearly 13 million jobs and contributing to nearly 25 percent of the country's Gross Domestic Product. The lack of progress resulting from federal delays on navigation projects, both deepening projects and channel maintenance projects, is becoming an increasingly critical problem facing the nation's port industry, in turn reducing the impact and potential growth of the port sector's contribution to the United States economy. Furthermore, without moving forward on numerous channel deepening projects, as well as the channel maintenance projects, the loss of distribution jobs to off-shore transshipment hubs in the Caribbean will continue, and add to the cost of imported goods. In addition, United States export prices will increase, thereby negatively impacting overall national economic health. Without an aggressive federal policy on channel deepening and channel maintenance, the cost of U.S. exports will continue to increase, making the goals of the current Administration's Export Initiative Program unattainable.

The purpose of this white paper is to highlight the economic costs that are associated with federal delays in moving forward on specific navigation projects in Florida. It is to be emphasized that the opportunity costs of the delays in the navigation projects in Florida are only a microcosm of the situation facing the United States port industry. Currently, the lack of maintaining shipping channels at authorized depths on the Great Lakes and inland waterways threatens to increase shipping costs, which will in turn impact the U.S. farming sector dependent on the inland waterways for grain and agricultural exports. Similarly, the lack of adequately maintained channels will impact the U.S. industrial sector, which is dependent on the ability to import iron ore and other raw materials to be used in steel production and related auto and manufacturing industries. Delays and underfunding of federal deepening and channel maintenance navigation projects are evident with the Gulf Coast, West Coast, Great Lakes and Atlantic Coast ports, and the fact that the \$7 billion of surplus in the Harbor Maintenance Trust Fund has not been applied to these critical projects has and will continue to have a negative economic impact on the United States' economy and its recovery from the recent recession.

The balance of this white paper focuses on the quantification of the opportunity cost to the state of Florida and the national economy of the potential delays in specific federal navigation projects at several of Florida's seaports.

Public ports in the state of Florida have a significant economic impact to the state's economy. Based on a just-completed assessment of the economic impact of the Florida Public Ports by Martin Associates, 2012 cargo and cruise activities at the 15 public seaports supported more than 600,000 jobs, \$2.4 billion of state and local taxes, and \$4.7 billion in Federal taxes. In addition, the cargo and cruise activities at the state's public ports contributed \$96.6 billion of

output to the state's economy, equivalent to about 13 percent of the state's total Gross Domestic Product.¹

The ability to not only maintain this economic contribution to the state and national economies, but to grow this economic contribution, is critically dependent upon several federal navigational projects within the state. The ability to move forward on these projects is of utmost importance to the state, as well as to the regional and national economies in terms of job and tax creation. It is to be emphasized that these are only a sample of the state's port projects that are dependent upon the moving forward of navigation projects.

There has been an increased focus on the diversification of containerized cargo via various U.S. ports. This is evident by the growth in container volume at the North Atlantic, South Atlantic and Gulf Coast ports. The growth of all-water service from Asia to the East Coast and Gulf Coast ports has been increasing significantly since 2002.

Underlying the growth in all-water containerized service activity at the Atlantic and Gulf Coast ports, and the investment in distribution center activity, is the expansion of the Panama Canal to be completed by 2015, and the increased deployment of vessels via the Suez Canal, particularly to serve the growing trade with countries located to the south of Singapore.

With the deployment of larger vessels via the Panama Canal after 2015, as well as the current and future deployment of larger vessels via the Suez Canal, the ability of Atlantic and Gulf Coast ports to handle the larger vessels is critical. It is to be emphasized that vessels with a capacity of 8,000 to 13,000 TEUs are now calling regularly at the West Coast ports, and vessels of similar size are now being deployed on the Asia-U.S. East Coast routing using the Suez Canal.² Furthermore, there is the expectation that some of the larger container vessels (in excess of 15,000 TEUs) built for use on the Asia-Europe trade lanes are beginning to be redeployed on the Transpacific trade, and the large 8,000-10,000 TEU vessels currently on the Transpacific trade will cascade to the current all water Suez Canal and eventual Panama Canal routings.³

The growth in the size of the container fleet is underscored by Exhibit I. **This exhibit indicates that 43 percent of the container vessels currently on order are in excess of 8,000 TEUs, and will require a 47-50 ft. plus channel depth under a full load. This compares to the current fleet composition. Currently, about 7 percent of the current world container fleet is in excess of 8,000 TEUs. Therefore, in the future, the size of the container ships will continue to increase, requiring a 47-50 ft. shipping channel.**

¹ The State-wide Economic Impacts of the Florida Public Ports 2012, prepared for the Florida Ports Council; March 14, 2013; Martin Associates

² : APL Exec: Prepare for the Onslaught of the Mega-Ships", The Journal of Commerce, March 7, 2013

³ "Bracing for the Cascade, Big ships from Europe-Asia expected to enter transpacific", American Shipper Global Trade and Logistics, April 2013.

Exhibit 1

Size Distribution of Current World Container Fleet and Order Book, as of 2012

TEU Size Class	Current Fleet	Order Book
<999	1,099	32
1000 < 1999	1,286	87
2000 < 3999	1,046	89
4000 < 5999	921	110
6000 < 7999	250	42
8000 < 9999	280	106
>= 10,000	<u>111</u>	<u>165</u>
Total	4,993	631

Source: Institute of Shipping Economic and Logistics, Shipping Statistics and Market Review, 2012

This presents a serious constraint at many Atlantic and Gulf Coast ports, as the majority of these ports, which will compete for the new services consisting of larger container vessels, do not have channel depths in the necessary -45 to -50 foot range. Exhibit 2 shows the current and planned depths at the key Atlantic and Gulf Coast ports.

Exhibit 2

Current and Planned Channel Depths at Selected Ports

State	Port Name	Current Depth	Planned Depth
Virginia	Norfolk/Hampton Roads	50	55
Maryland	Baltimore	50	50
South Carolina	Charleston	45	45+
New York	New York (Underway)	45	50
Texas	Corpus Christi (Authorized)	45	55
Alabama	Mobile	45	45
Texas	Freeport (Authorized)	45	55
Florida	Miami (Authorized and Funded)	45	50
Texas	Houston-Galveston	45	45
Louisiana	New Orleans	45	45
Florida	Tampa	43	43
Georgia	Savannah	42	48
Florida	Port Everglades	42	50
Massachusetts	Boston	40	48
Delaware River	DE, PA, NJ Ports Portions Underway	40	45
Texas	Sabine Naches	40	42-48
Florida	Jacksonville	40	45+
Florida	Manatee	40	40

Source: Martin Associates, 2012

The ability to serve as a first inbound-port call for an Asian all-water service to the East Coast of the United States is of critical importance not only to the state economy, but to the national economy as well. With the completion of the Panama Canal expansion to accommodate vessels with a draft in excess of forty-five (45) feet and length overall (LOA) in excess of one thousand (1,000) feet, there has been growth in the development of container transshipment hubs in the Caribbean. This growth has been the result of several factors. First, the economies of using larger ships to transport cargo, particularly containerized cargo, between Asia and the mainland United States (East and Gulf Coasts), are only realized when the vessels are deployed on relatively long routes with minimal port calls. The ability to handle a first-inbound port call of a fully laden vessel (8,500 TEUs and greater) will require that the port facilities have channels and berths of a depth of 47-50 feet. Most ports on the United States East Coast and Gulf Coast do not currently have sufficient water depth to accommodate a fully-laden first port of call of vessel likely to be deployed after the expansion of the Panama Canal.

The process of deepening port channels in the United States is a very cumbersome and lengthy process. It is unlikely that funding for new projects will be approved in the next several years and hence East and Gulf Coast ports are limited in their ability to handle the fully laden ships likely to transit the Panama Canal after 2015 and the current sized vessels now deployed to the East and Gulf Coasts via the Suez Canal. Because of the limitations of the majority of East and Gulf Coast ports in the United States to accommodate these fully laden Panamax ships, the development of transshipment hubs in the Caribbean will likely continue to grow. Such development has already occurred in the Bahamas, Panama and Costa Rica, and additional developments are under study in Puerto Rico, Haiti, the Dominican Republic and Cuba. The larger vessels transiting the Panama Canal (after 2015) from Asia will discharge containers at these transshipment hubs and then return to Asia. Smaller vessels will be deployed from the transshipment hubs to serve the Atlantic and Gulf Coast United States ports.

In addition, these transshipment hubs represent an opportunity to mix north and south bound cargoes headed to and from Asia and the United States, and to develop import distribution centers to compete with those centers in the Southeastern United States

In addition to the development of transshipment hubs, there exists the possibility of developing distribution centers in the Caribbean to serve not only the regional Caribbean markets, but also to serve as “off-shore” distribution centers for the United States markets. In these centers, value added processing would be undertaken including labeling, repairs, re-packaging and even pre-racking of apparel items for direct delivery into retail stores in the United States. This type of development would substitute for and compete with the import distribution centers that have traditionally developed in the North and South Atlantic port regions of the United States. Without sufficient channel depth at the key Florida gateway ports, Florida will not be able to compete with the Caribbean transshipment centers to attract the larger container vessels, and will lose the opportunity to leverage a first-inbound port call into the

development of import distribution/logistics center operations. This distribution center function accompanying the establishment of first-inbound port calls will potentially be lost to off-shore Caribbean locations.

Martin Associates estimates that the economic development impacts for an import distribution center/logistics center associated with an annual first-inbound port service is about 11,500 jobs annually. **Therefore, for each of the container services, defined as 52 port calls per year that call a Caribbean transshipment service rather than a United States port, the opportunity cost of exporting distribution/logistics center jobs is nearly 12,000 direct, induced and indirect jobs annually.** While this growth in jobs will not likely increase linearly with each new first inbound port call service, the magnitude of the potential job and economic impact loss underscores the importance to ready the U.S. Port System to compete with the transshipment/logistics centers developing off-shore.

The changing dynamics of the container trade and the need for deeper channels at U.S. Gulf and Atlantic Coast ports has direct implications for four of Florida's seaports - the ports of Miami, Jacksonville Everglades and Tampa. Each of these ports has the ability to provide gateway services into Florida and the Southeastern United States for cargo now moving, and projected to move, on the all-water services between Asia and the Eastern/Midwestern United States. The feasibility of deepening the channels at each of these ports has been under rigorous study by the United States Army Corps of Engineers for numerous years, and several recent decisions by the Corps regarding each of these projects will have important implications to the economic contribution of these ports to the state and national economies.

1. PortMiami –50 Foot Channel Deepening Project

PortMiami has received full authorization to move forward on the deepening of the Channel to -50ft. Although authorized for channel deepening, federal funding has not been appropriated for the project. Due to its critical timing, the state of Florida and Port Miami have agreed to advance the federal funding, estimated at \$75 million, in order to move forward with the project. Federal reimbursement remains uncertain.

The actual deepening project is projected to begin by mid-summer 2013, and when completed, Miami will only be the fourth port (Baltimore, New York and Norfolk are the other three ports that have a 50 ft. channel) on the Gulf and Atlantic Coast port ranges able to handle the larger vessels now deployed through the Suez Canal, and that will be deployed via the Panama Canal after the completed expansion in 2015.

As estimated in the February 2013, 2012 Local and Economic Impacts of PortMiami⁴, the port's maritime cargo and cruise activity supported 208,000 jobs within the state of Florida, generated nearly \$800 million of state and local tax revenues annually, and \$1.5 billion of federal taxes annually. In order to maintain this economic contribution, as well as to grow the jobs and tax revenue generated by PortMiami, it is critical that the deepening project move ahead as quickly as possible. Without additional East Coast deep draft capacity in place by 2015, the U.S. is at risk of losing jobs overseas, as the larger post Panamax ships have the option of calling at international ports such as Freeport in the Bahamas. Should the port not be able to accommodate a fully loaded container ship requiring -50 foot of water, it is most likely that this vessel will call a deepwater transshipment hub, and serve the U.S. market with a feeder vessel from the off-shore location. The importance of this is that the cargo that would move on a first-inbound port of call into Miami for reshipment back to the Caribbean or Latin America would be served via distribution centers located at the off-shore transshipment hubs in the absence of a -50 foot channel. Therefore, not only will jobs be lost at PortMiami from the loss of cargo associated with the discharge and reload of a larger container ship, but jobs within the Florida (and the United States) logistics supply chain will be lost, as these jobs will be transferred to the off-shore transshipment hubs which will serve the Caribbean and Latin American trades from locations outside the United States.

To quantify the impact of not completing the -50 foot channel, Martin Associates used the Economic Impact Model of PortMiami to estimate the impact of the deep dredge project. It was assumed that about 15 percent of the future container fleet calling PortMiami in 2015 would consist of vessels requiring a -50 foot channel depth for a first-inbound port of call. These vessels would not only discharge cargo destined for the Florida market, but would also discharge cargo for re-export to the Caribbean and Latin American markets. The ability to accommodate these larger vessels equates to about 98,000 containers annually. Conversely, without a -50 foot channel, these 98,000 containers would be discharged at an off-shore transshipment hub, never reaching U.S. soil. Therefore, the completion of the -50 foot channel at PortMiami can be quantified in terms of the number of jobs that would be generated by the 98,000 containers annually. Using the Martin Associates PortMiami Economic Impact Model, it was estimated that these 98,000 containers would generate approximately 33,000 direct, induced and indirect jobs throughout the state annually. These jobs are created at various points along the supply chain, as the containers move from the port to distribution centers and ultimate points of consumption, including the re-export of the commodities to the Caribbean and Latin America. **These jobs would not occur if the containers were delivered to an off-shore transshipment center and then re-loaded for the Caribbean and Latin American destinations. In addition to the job impact, this project is estimated to generate about \$97 million of state and local taxes as well as \$190 million in federal taxes annually.**

⁴ Economic Local and Regional Economic Impacts of PortMiami, February 4, 2013, Martin Associates.

2. Port of Jacksonville (JAXPORT) – 47 Feet River Deepening Project

The United States Army Corps of Engineers has completed its feasibility study of deepening the St. John's River. The local preferred plan is to deepen the river to a depth of -47 feet. The original Corps finding was that a depth of only 44 feet was feasible for federal funding, but the project is still under Corps review. The -47 foot deepening would provide JAXPORT with the ability to market directly to the ocean carriers providing all-water services between Asia and the South Atlantic port range, and to attract cargo now moving to and from Florida and Asia via other non-Florida ports, including Savannah, and intermodally via the West Coast ports thereby providing a lower logistics cost to Florida consumers and exporters. The ability for JAXPORT to compete for this cargo now moving to and from Florida via non-Florida ports will similarly increase the ability of JAXPORT to grow its economic contribution to the Northeast Florida regional economy as well as the economy of the state of Florida. By providing a lower transportation and logistics cost to Florida consumers and producers, the overall economy will benefit.

Moving forward to complete the -47 ft. channel project at JAXPORT will provide significant dividends to the state and national economies. The impact of not completing the -47 ft. channel will have a significant economic impact to the state of Florida, as well as the Northeastern Florida regional economy. As part of the current JAXPORT strategic plan, it is estimated that the deepening of the St. John's River to -47 ft. will provide the port with the opportunity to grow the container business to about 2.8 million TEUs by 2040. Without the -47 ft. channel, and assuming the St. John's River remains at a -40 ft. channel depth, the annual container throughput is projected to reach only about 830,000 TEUs by 2035, as the port would not be able to participate in the United States-Asia trade routes, and would be relegated to a regional port, primarily serving Puerto Rican and other Caribbean trade lanes. Therefore, without deepening the channel to -47 ft., about 1.9 million TEUs would move through other ports, most likely Savannah and the West Coast ports of Los Angeles and Long Beach, at a higher logistics cost. Furthermore, with a -47 ft. depth channel in the St. John's River, JAXPORT will be able to serve as a first inbound-port call to carriers serving the U.S. East Coast-Asia trade lane and compete with Caribbean transshipment centers and the associated logistics centers.

In terms of economic impact, the potential lost container volume due to the lack of a -47 ft St. John's River Channel was used with the Martin Associate's JAXPORT Container Economic Impact Model to translate the foregone annual container tonnage into economic impacts to the state of Florida and the nation. Exhibit 3 presents the economic impact of not deepening the St. John's River to a -47 ft. depth in terms of direct, induced and indirect port jobs associated with the handling of containers and the moving of containers between the port and importers/exporters located in the state of Florida, as well as those located in other portions of the country.

**THE OPPORTUNITY COST OF DELAYS IN NAVIGATION PROJECTS, A CASE STUDY OF
SELECTED NAVIGATIONAL PROJECTS FOR FLORIDA PORTS**

Exhibit 3

Projected Opportunity Cost of Not Deepening the St. John's River to -47 ft.

TEU Projections Scenarios	2020	2025	2030	2035
Low and No Deepening	732,816	762,889	796,093	832,752
Moderate Penetration with 47ft	1,379,800	1,566,364	1,769,642	2,010,604
Aggressive Penetration with Deepening to 47ft	1,713,294	1,952,976	2,217,831	2,530,178
Aggressive with 47ft + Intermodal Penetration	1,877,695	2,143,562	2,438,772	2,786,309
Maximum Opportunity Cost of No Deepening (TEUS)	1,144,879	1,380,672	1,642,680	1,953,557
Opportunity Cost in Terms of Lost Economic Impacts	2020	2025	2030	2035
Jobs				
Direct	3,274	3,949	4,699	5,587
Induced	3,015	3,636	4,326	5,145
Indirect	1,824	2,199	2,617	3,112
Total	8,113	9,784	11,642	13,844
Personal Income (1,000)				
Direct	\$131,660	\$158,776	\$188,907	\$224,657
Re-spending/Local Consumption	\$383,683	\$462,704	\$550,511	\$654,695
Indirect	\$76,337	\$92,060	\$109,530	\$130,259
Total	\$591,680	\$713,540	\$848,948	\$1,009,611
Business Revenue (1,000)	\$492,250	\$593,632	\$706,284	\$839,948
Local Purchases (1,000)	\$150,045	\$180,948	\$215,286	\$256,029
State/Local Taxes (1,000)	\$54,435	\$65,646	\$78,103	\$92,884

Source: Martin Associates, 2012

As this exhibit indicates, by 2035, the opportunity cost of not providing a -47 ft. channel to handle the projected 1.9 million TEUs of cargo is about 14,000 port sector jobs annually. In addition to the 14,000 port sector job impact associated with port operations driven by the foregone 1.9 million TEUs, the potential loss of the distribution center activity associated with one first-inbound Asian service has been estimated by Martin Associates as 11,500 direct induced and indirect jobs annually. Therefore, by 2035, the job impact associated with the deepening of the St. John's River is estimated at about 26,000 direct, induced and indirect jobs annually, including the distribution center jobs associated with a first inbound port call annual service.

3. Port Everglades – Deepening Project

The Harbor Feasibility Study to deepen and widen the Port Everglades shipping channel was initiated in 1997 at a proposed cost of \$800,000. A recent amendment to the Federal Cost Share Agreement, the ninth since project inception in 1997, has been recently approved by Broward County, at a new total cost for the study of \$11,000,000.

In November 2012, the Harbor Feasibility Study was scheduled to be released for public comment, prior to the final approval of the project to deepen the Channel to -50 ft. However, before its release for public comment, the United States Army Corps of Engineers decided that a new benefits analysis was required, thus creating another delay. This represents 16 years of delay and over \$10 million in increased costs for the study alone. The loss of business opportunity for Port Everglades over this period is incalculable.

The need for a deeper channel is underscored by the fact that Port Everglades currently serves as a key port for one of the world's largest container operators providing all-water service between the United States East and Gulf Coast and Asia, using both the Panama Canal and the Suez Canal. Port Everglades currently serves as the last port of call prior to the departure of the vessel to a Caribbean transshipment hub or to a foreign port destination. Currently, the vessels deployed on this service are required to be light-loaded at Port Everglades, as they have a design draft of -45 ft. With the current -42 ft. channel at Port Everglades, the fact that the vessel cannot be loaded to its capacity results in an increase cost of operation to the ocean carrier of about 25-30 percent per container. With this type of cost penalty to the ocean carriers currently deployed on the Asian-U.S. all-water service, and without deepening the harbor channel to a -47 ft. or greater depth, it is likely that the port will not only lose its Asian container service, but that this existing service will consolidate its operations at another port, or more likely, at an off-shore transshipment hub in the Caribbean or Panama.

The current impact of the Asian services at Port Everglades is measured at about 2,000 direct, induced and indirect jobs annually, with a state and local tax impact of \$12.3 million annually and a nearly \$24 million annual federal tax impact.

With the deepening of the channel, and the ability to attract an annual first-inbound port of call service from Asia, the potential economic impact would grow to about 8,000 direct, induced and indirect jobs annually in the port sector, with the potential to attract an import distribution center/logistics center that would support an additional 11,500 jobs annually. Overall, the opportunity cost of not deepening the channel to a depth to accommodate the 6,500-8,500 TEU size class of vessels would cost the state of Florida nearly 20,000 jobs annually, and more importantly would raise the possibility of losing distribution center jobs from the United States to off-shore transshipment locations in the Caribbean. **Associated with this potential 11,500 job loss of distribution center activity to off-shore locations is a loss of \$150 million of annual federal tax revenue.**

4. Port of Tampa – Channel Widening and Deepening

The Port of Tampa is currently pursuing an opportunity at Port Redwing to develop a major bulk operation/processor. While details of the project are confidential, the project is estimated to have a major economic impact for the state as well as the national economy, because the impacts are associated with a new operation, and the associated economic impacts are net additions to the state and national economies. The projected economic impacts of the project are based on the movement of more than 3 million tons of bulk materials. The project would include nearly \$250 million of private sector investment.

Using the Martin Associates Economic Impact Model developed for the Port of Tampa, it is estimated that this project would support 1,800 direct, induced and indirect jobs annually, and generate \$10.3 million of state and local taxes, and nearly \$20 million of federal tax revenue annually. If the project does not occur, these economic benefits would be eliminated.

These impacts are summarized in Exhibit 4.

Exhibit 4
Potential Economic Impact of Proposed Bulk Facility Dependent on
Channel Widening and Deepening Project at the Port of Tampa

IMPACT CATEGORY	ANNUAL IMPACTS
JOBS	
DIRECT	537
INDUCED	550
INDIRECT	691
TOTAL JOBS	1,778
PERSONAL INCOME (1,000)	
DIRECT	\$23,973
INDUCED	\$53,848
INDIRECT	\$32,798
TOTAL PERSONAL INCOME	\$110,619
BUSINESS SERVICES REVENUE (1,000)	\$103,006
LOCAL PURCHASES (1,000)	\$61,429
TOTAL STATE AND LOCAL TAXES (1,000)	\$10,288
FEDERAL TAXES (1,000)	\$19,911

Source: Martin Associates, 2012

In addition to the projected annual impacts of the navigational improvement-dependent project, the \$225 million landside construction expenditures associated with the project are projected to support more than 4,000 jobs over the construction period.

The project feasibility is predicated on the ability to complete the necessary channel widening and deepening. Along with the \$250 million of private sector investment, the port and other private companies along this channel are planning over \$100 million in investments which may be delayed, or the facilities underutilized due to navigational inefficiencies (depth and width). The inability to deliver navigational/channel improvements in a timely manner at the Port Redwing facility because of the procedural and programmatic delays by the United States Army Corps of Engineers could potentially divert, or jeopardize the ability of the port to convert this opportunity.

5. Summary

The four case studies of key economic development projects dependent upon the timely completion of navigation projects in Florida are only a small sample of projects in the state and nationwide that are dependent upon the completion of federal navigation projects under the control of the United States Army Corps of Engineers. As these case studies for the Florida ports demonstrate, the impact on the national economy, as well as the local and regional economies in which the projects are located, represent the opportunity cost to the country of not moving forward on the completion of viable navigational projects. Navigational projects throughout the country at both deepwater and inland river ports are currently delayed and not funded, despite the \$7 billion surplus on the Harbor Maintenance Trust Fund. As demonstrated, delays in these projects have a costly economic consequence for the United States. This is demonstrated not only in terms of the foregone opportunity of creating new jobs, but the potential export of jobs and associated economic impacts to off-shore transshipment and distribution/logistics centers in the Caribbean. These lost jobs and economic opportunities are directly related to the inability of the U.S. East and Gulf Coast ports to accommodate the large container vessels that are projected to transit the Panama Canal after its completed expansion in 2015.

Because of the severe economic consequences of the delays and underfunding of the federal navigation projects, it is critical that this Administration's focus be amplified, and that unified Congressional action be directed at moving these projects forward in a timely manner.