



M495 – Fast Ferry Passenger Service Business Plan

Steering Committee Meeting 5

Northern Virginia Regional
Commission

Tim Payne, Senior Principal

November 28, 2022

N NELSON
NYGAARD



Steering Committee Meeting 5 Agenda

- 1 Introduction & Overview**
- 2 Review of Additional Tasks**
- 3 New Route & Market Assessment**
- 4 Investor Sounding**
- 5 Project Governance**

Introduction & Overview

Welcome Everyone!



Please introduce yourself by
adding your name and
organization to the Teams chat


Visit the updated website



For a refresher on what we've been up to, please visit the project website:

<http://potomaccommuterfastferry.com/>

Planned Stakeholder Meetings



MEETING DATES	TOPIC
November 28 / Dec 1, 2022 Virtual	OVERVIEW & GOAL-SETTING
January 30 / Feb 2, 2023 Virtual	MARKET ASSESSMENT
March 27 / 30, 2023 In-person/Hybrid	GOVERNANCE
May 29 / June 1, 2023 Virtual	INVESTOR SOUNDING

Review of Additional Tasks

Market Assessment (Part 2)

4

Market Assessment (Part 2)

- Summary of candidate corridors for additional study
 - Market assessment of each of the corridors
 - Infrastructure assessment of corridors to be advanced
 - Report with order of implementation feasibility report
 - Website update & tutorial
- Add one more route to the analysis

Investor Sounding Exercise

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Investor Sounding Exercise

Four market sounding sessions with a report documenting the sessions

- I. Investor Opportunities
- II. Vessel & Terminal Operators
- III. Teaming Engagements
- IV. Lo-No Emission Vessel Technology (with feasibility and risk assessment of lo-no emission vessel specification)

- Present concept of a ferry system to various financial markets, operators, and jurisdictions

Project Governance, Procurement & Delivery Roadmap

- Attempt to create interest in an on-going coalition that does not center on NVRC
 - Some group needs to step forward to move regular ferries into operation.
 - That group may be private, it may be government, it may be public-private, it may be non-profit.
 - If a jurisdiction that has existing seasonal, tourism-based service were to expand the service model, there is potential for private sector interest.

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Project Governance, Procurement & Delivery Roadmap

- Implementation and transition plan to new governing authority
- Up to 3 workshops with identified governing authority or candidates
- Key challenges, constraints, risk tolerance assessment report for region

Final Presentation

- Compete reports
- Update website with all information
- Provide a final presentation to the NVRC board

7

Final Presentation

- Final presentation to NVRC board

Overview of all tasks

4

Part 2 Market Assessment

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Final Presentation

- Final presentation to NVRC board

New Route & Market Assessment

Overview

- Original routes for study were selected based on **preliminary scoring of criteria & stakeholder feedback**
- Outcome for today
 - Validate scoring and criteria on other potential routes that are attractive for starting a ferry service
 - Gather steering committee feedback on top 3 candidates

Final route for study will be selected by mid-December in order to evaluate market assessment results by late January

Part 2 Market Assessment

- Summary of candidate corridors for additional study
- Market assessment of each of the corridors
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- Report with order of implementation feasibility report
- Website update & tutorial

Overview - Route Selection Criteria



**Multi-
modally
Connected**



**Opportunity
for Growth**



**Feasible to
Operate**



**Available or
Ready-to-
build
Terminal**



**High
Projected
Ridership**



Cost-effective



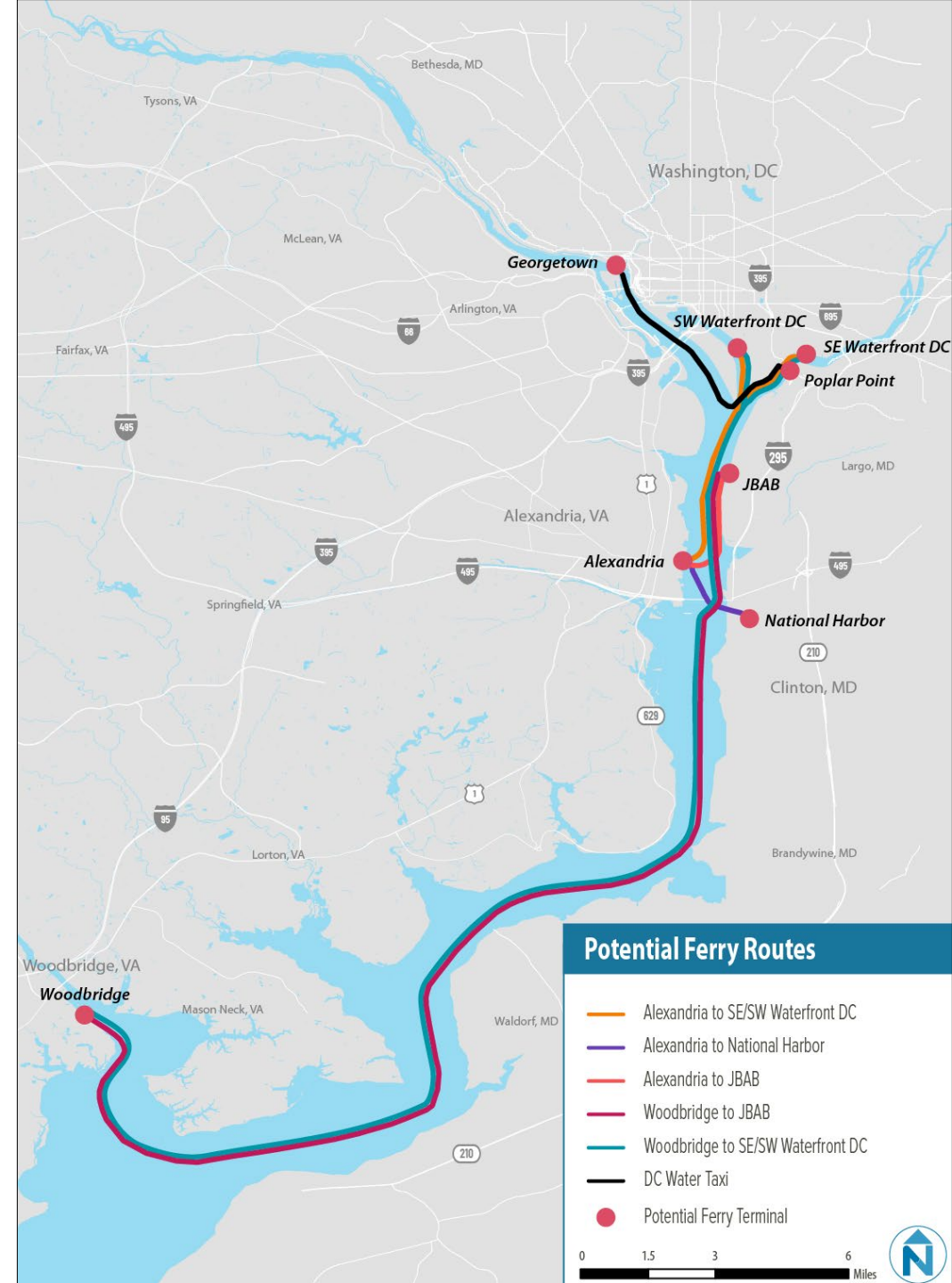
**Manageable
Risk**

Original Routes

TIER 1

TIER 2

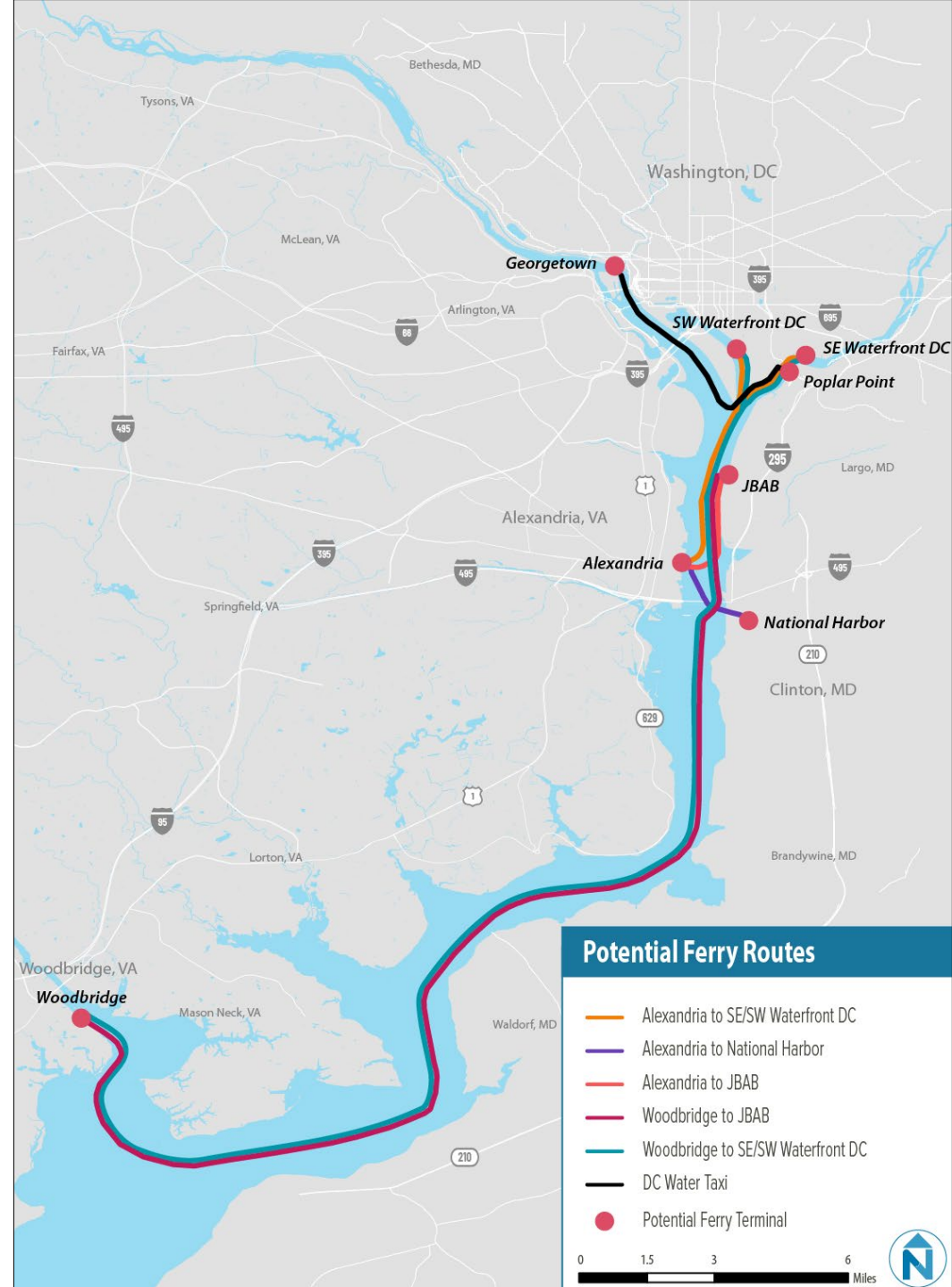
ID	Origin	Destination
1	Alexandria	SE/SW Waterfront DC
2	Alexandria	National Harbor
3	Alexandria	JBAB
4	Georgetown (DC Water Taxi)	Poplar Point
5	Woodbridge	SE/SW Waterfront DC
6	Woodbridge	JBAB
7	Charles County	Quantico
8	Charles County	SE/SW Waterfront DC
9	Charles County	Fort Belvoir
10	Charles County	JBAB
11	Crystal City	Poplar Point
12	SE/SW Waterfront DC	Crystal City
13	SE/SW Waterfront DC	Pentagon
14	SE/SW Waterfront DC	National Airport
15	Spotsylvania	Quantico
16	Stafford County	SE/SW Waterfront DC
17	Woodbridge	National Harbor
18	Woodbridge	Alexandria
19	Woodbridge	National Airport



Original Routes & Routes Identified as On Hold

TIER 1
TIER 2

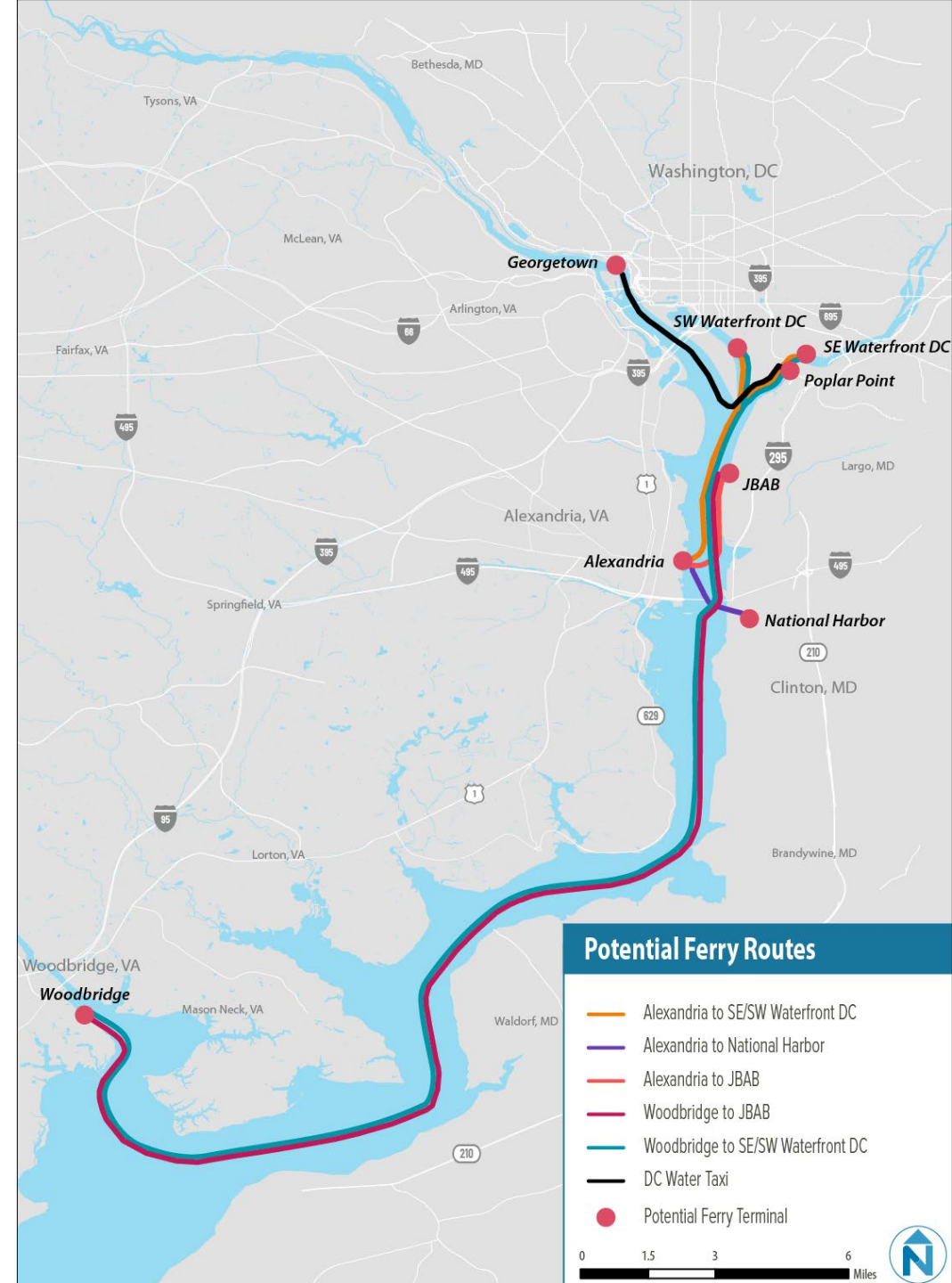
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11	Crystal City	Poplar Point
12	SE/SW Waterfront DC	Crystal City
13	SE/SW Waterfront DC	Pentagon
14	SE/SW Waterfront DC	National Airport
15	Spotsylvania	Quantico
16	Stafford County	SE/SW Waterfront DC
17	Woodbridge	National Harbor
18	Woodbridge	Alexandria
19	Woodbridge	National Airport



Original Routes & Routes Selected for Study

TIER 1
TIER 2

ID	Origin	Destination
1	Alexandria	SE/SW Waterfront DC
2	Alexandria	National Harbor
3	Alexandria	JBAB
4	Georgetown (DC Water Taxi)	Poplar Point
5	Woodbridge	SE/SW Waterfront DC
6	Woodbridge	JBAB
7	Charles County	Quantico
8	Charles County	SE/SW Waterfront DC
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11	Crystal City	Poplar Point
12	SE/SW Waterfront DC	Crystal City
13	SE/SW Waterfront DC	Pentagon
14	SE/SW Waterfront DC	National Airport
15	Spotsylvania	Quantico
16	Stafford County	SE/SW Waterfront DC
17	Woodbridge	National Harbor
18	Woodbridge	Alexandria
19	Woodbridge	National Airport



Original Routes and Preliminary Criteria Scoring

	Origin	Destination	Tier	Available or Ready-to-build Terminal		Multi-modally Connected		Population / Job Density at terminals		Opportunity for Growth
				Origin	Destination	Origin	Destination	Origin	Destination	
1	Alexandria	SE/SW Waterfront DC	1	✓	✓	✓	✓	✓	✓	✓
2	Alexandria	National Harbor	1	✓	✓	✓	✓	✓	✓	✓
3	Alexandria	JBAB	1	✓	✓	✓	✗	✓	✓	✓
4	Georgetown / Water Taxi	Poplar Point	1	✓	✗	✓	✗	✓	✓	✓
5	SE/SW Waterfront DC	Poplar Point	1	✓	✗	✓	✗	✓	✓	✓
6	Woodbridge	SE/SW Waterfront DC	1	✓	✓	✗	✓	✓	✓	✓
7	Woodbridge	JBAB	1	✓	✓	✗	✗	✓	✓	✓
8	Charles County	Quantico	2	✓	✓	✗	✓	✗	✓	✓
9	Charles County	SE/SW Waterfront DC	2	✓	✓	✗	✓	✗	✓	✓
10	Charles County	Fort Belvoir	2	✓	✓	✗	✗	✗	✗	✗
11	Charles County	JBAB	2	✓	✓	✗	✗	✗	✓	✓
12	Crystal City/ Potomac Yard	Poplar Point	2	✗	✗	✗	✗	✓	✓	✓
13	SE/SW Waterfront DC	Crystal City/Potomac Yard	2	✓	✗	✓	✓	✓	✓	✓
14	SE/SW Waterfront DC	Pentagon	2	✓	✗	✓	✓	✓	✓	✗
15	SE/SW Waterfront DC	National Airport	2	✓	✗	✓	✓	✓	✓	✓
16	Spotsylvania	Quantico	2	✗	✓	✗	✓	✗	✓	✗
17	Stafford County	SE/SW Waterfront DC	2	✓	✓	✗	✓	✗	✓	✓
18	Woodbridge	National Harbor	2	✓	✓	✗	✓	✓	✓	✓
19	Woodbridge	Alexandria	2	✓	✓	✗	✓	✓	✓	✓
20	Woodbridge	National Airport	2	✓	✗	✗	✓	✓	✓	✓

Potential Routes Phase 1 Routes Excluded

	Origin	Destination	Tier	Available or Ready-to-build Terminal		Multi-modally Connected		Population / Job Density at terminals		Opportunity for Growth
				Origin	Destination	Origin	Destination	Origin	Destination	
1	Georgetown / Water Taxi	Poplar Point	1	✓	✗	✓	✗	✓	✓	✓
2	Charles County	Quantico	2	✓	✓	✗	✓	✗	✓	✓
3	Charles County	SE/SW Waterfront DC	2	✓	✓	✗	✓	✗	✓	✓
4	Charles County	Fort Belvoir	2	✓	✓	✗	✗	✗	✗	✗
5	Crystal City/ Potomac Yard	Poplar Point	2	✗	✗	✗	✗	✓	✓	✓
6	SE/SW Waterfront DC	Crystal City/Potomac Yard	2	✓	✗	✓	✓	✓	✓	✓
7	SE/SW Waterfront DC	Pentagon	2	✓	✗	✓	✓	✓	✓	✗
8	SE/SW Waterfront DC	National Airport	2	✓	✗	✓	✓	✓	✓	✓
9	Spotsylvania	Quantico	2	✗	✓	✗	✓	✗	✓	✗
10	Stafford County	SE/SW Waterfront DC	2	✓	✓	✗	✓	✗	✓	✓
11	Woodbridge	National Harbor	2	✓	✓	✗	✓	✓	✓	✓
12	Woodbridge	National Airport	2	✓	✗	✗	✓	✓	✓	✓

Potential Routes with Round 2 of Route Elimination

	Origin	Destination	Tier	Available or Ready-to-build Terminal		Multi-modally Connected		Population / Job Density at terminals		Opportunity for Growth
				Origin	Destination	Origin	Destination	Origin	Destination	
1	Georgetown / Water Taxi	Poplar Point	1	✓	✗	✓	✗	✓	✓	✓
2	Charles County	Quantico	2	✓	✓	✗	✓	✗	✓	✓
3	Charles County	SE/SW Waterfront DC	2	✓	✓	✗	✓	✗	✓	✓
4	Charles County	Fort Belvoir	2	✓	✓	✗	✗	✗	✗	✗
5	Crystal City/ Potomac Yard	Poplar Point	2	✗	✗	✗	✗	✓	✓	✓
6	SE/SW Waterfront DC	Crystal City/Potomac Yard	2	✓	✗	✓	✓	✓	✓	✓
7	SE/SW Waterfront DC	Pentagon	2	✓	✗	✓	✓	✓	✓	✗
8	SE/SW Waterfront DC	National Airport	2	✓	✗	✓	✓	✓	✓	✓
9	Spotsylvania	Quantico	2	✗	✓	✗	✓	✗	✓	✗
10	Stafford County	SE/SW Waterfront DC	2	✓	✓	✗	✓	✗	✓	✓
11	Woodbridge	National Harbor	2	✓	✓	✗	✓	✓	✓	✓
12	Woodbridge	National Airport	2	✓	✗	✗	✓	✓	✓	✓

Potential Routes Remaining for Additional Study

Regional Service — Metro Service Area

	Origin	Destination	Tier	Available or Ready-to-build Terminal		Multi-modally Connected		Population / Job Density at terminals		Opportunity for Growth
				Origin	Destination	Origin	Destination	Origin	Destination	
1	Georgetown / Water Taxi	Poplar Point	1	✓	✗	✓	✗	✓	✓	✓
2	Crystal City/ Potomac Yard	Poplar Point	2	✗	✗	✗	✗	✓	✓	✓
3	SE/SW Waterfront DC	Crystal City/Potomac Yard	2	✓	✗	✓	✓	✓	✓	✓
4	SE/SW Waterfront DC	Pentagon	2	✓	✗	✓	✓	✓	✓	✗
5	SE/SW Waterfront DC	National Airport	2	✓	✗	✓	✓	✓	✓	✓
6	Charles County	Quantico	2	✓	✓	✗	✓	✗	✓	✓
7	Charles County	Fort Belvoir	2	✓	✓	✗	✗	✗	✗	✗

Route Selection Questions

www.menti.com code:

Investor Sounding

Selecting External Stakeholders

- Investor Sounding (and subsequent workshops for Task 6) will help to garner additional support and awareness of the effort

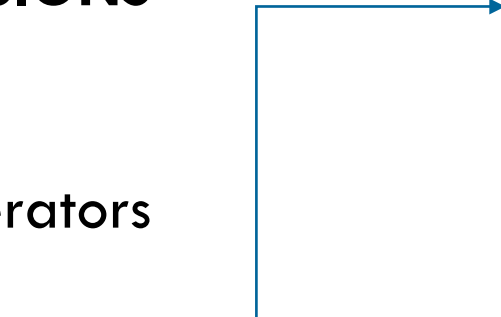
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Identifying Potential Stakeholders

MARKET SOUNDING SESSIONS

- I. Investor Opportunities
 - II. Vessel & Terminal Operators
 - III. Teaming Engagements
 - IV. Lo-No Emission Vessel Technology
- 

For Session III, ideal partners will be jurisdictions with existing private ferry service or those with terminal sites for potential service.

Relationships formed here could dovetail into Task 6 (identify an entity to aid in transition to new governing authority)

Transportation Departments

- District Department of Transportation (DDOT)
- Washington Metropolitan Transit Authority (WMATA)
- City of Alexandria's Transportation & Environmental Services Department (CoA T&ES)
- Prince William County's Department of Transportation
- Arlington County's Transportation Engineering and Operations Bureau

Business Improvement Districts (BIDs)

- Crystal City BID
- Southwest BID

Identifying Potential Stakeholders

MARKET SOUNDING SESSIONS

- Investor Opportunities
- Vessel & Terminal Operators
- Teaming Engagements
- Lo-No Emission Vessel Technology

Investor Sounding Questions

www.menti.com code:

Project Governance

Recommendations & Needs

- Outcome for Phase 2
 - Identify an entity that can carry the project forward and work with partnering jurisdictions re: capital & operational feasibility
- Phase 1 Recommendations
 - Create governing body based on jurisdiction(s) involved with an original ferry service operation
 - Ensure autonomy from gubernatorial or congressional approval
 - Ensure ability to refine/evolve/expand governing agreement

6

Project Governance, Procurement & Delivery Roadmap

- Implementation and transition plan to new governing authority
- Up to 3 workshops with identified governing authority or candidates
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Questions? / Comments?

Next Steps

Overview of all tasks

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Part 2 Market Assessment

- Summary of candidate corridors for additional study
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