



# M495 – Fast Ferry Passenger Service Business Plan

## **Stakeholder Meeting 5**

Northern Virginia Regional  
Commission

Tim Payne, Senior Principal

December 1, 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
<b>November 28 / Dec 1, 2022</b> Virtual	<b>OVERVIEW &amp; GOAL-SETTING</b>
<b>January 30 / Feb 2, 2023</b> Virtual	<b>MARKET ASSESSMENT</b>
<b>March 27 / 30, 2023</b> In-person/Hybrid	<b>GOVERNANCE</b>
<b>May 29 / June 1, 2023</b> Virtual	<b>INVESTOR SOUNDING</b>

# Review of Additional Tasks

# Market Assessment (Part 2)

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## 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

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## Final Presentation

- Final presentation to NVRC board

# Overview of all tasks

4

## Part 2 Market Assessment

- Summary of candidate corridors for additional study
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## Investor Sounding Exercise

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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
- Infrastructure assessment of corridors to be advanced
- 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**



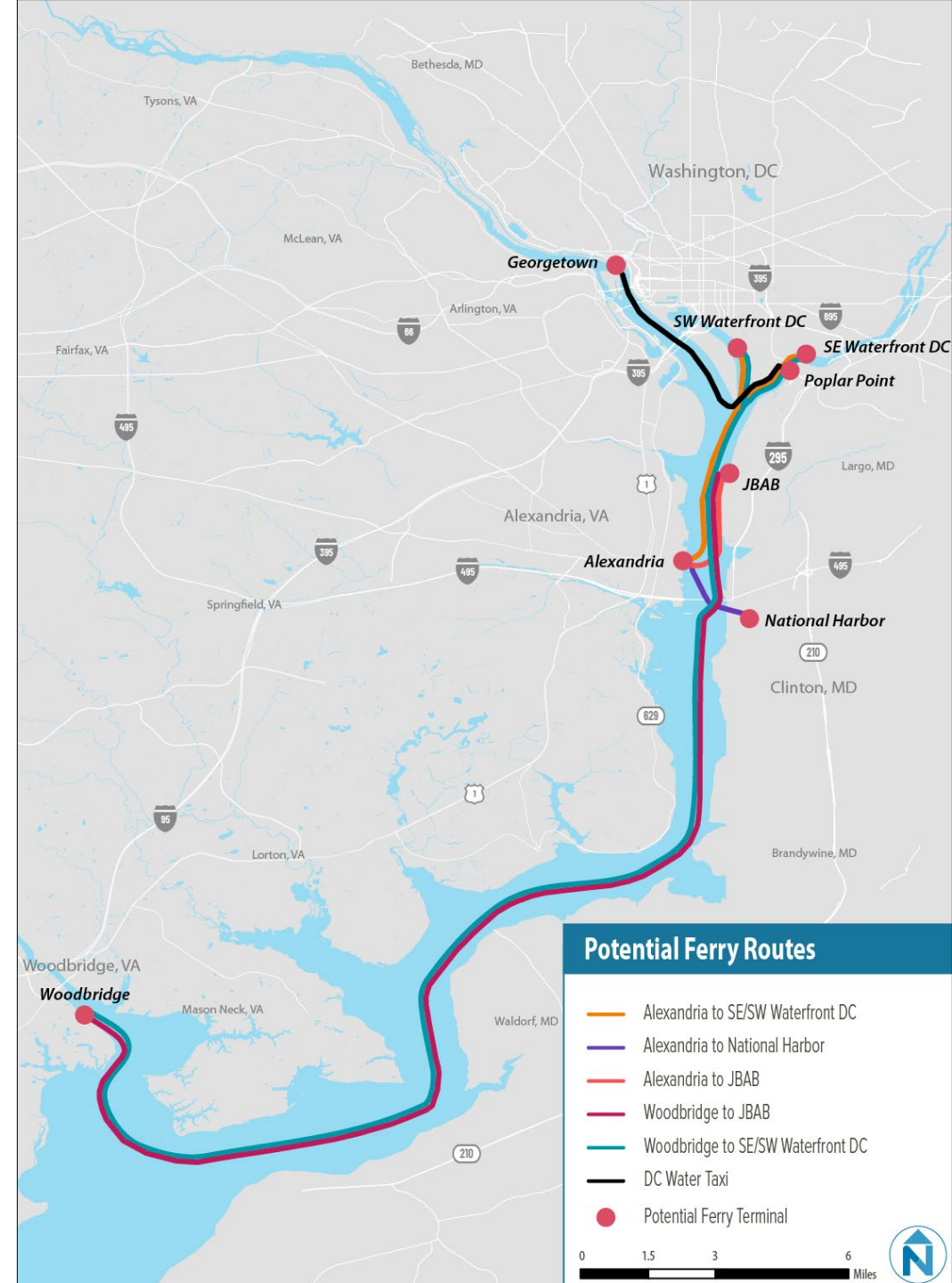
**Manageable  
Risk**

# 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

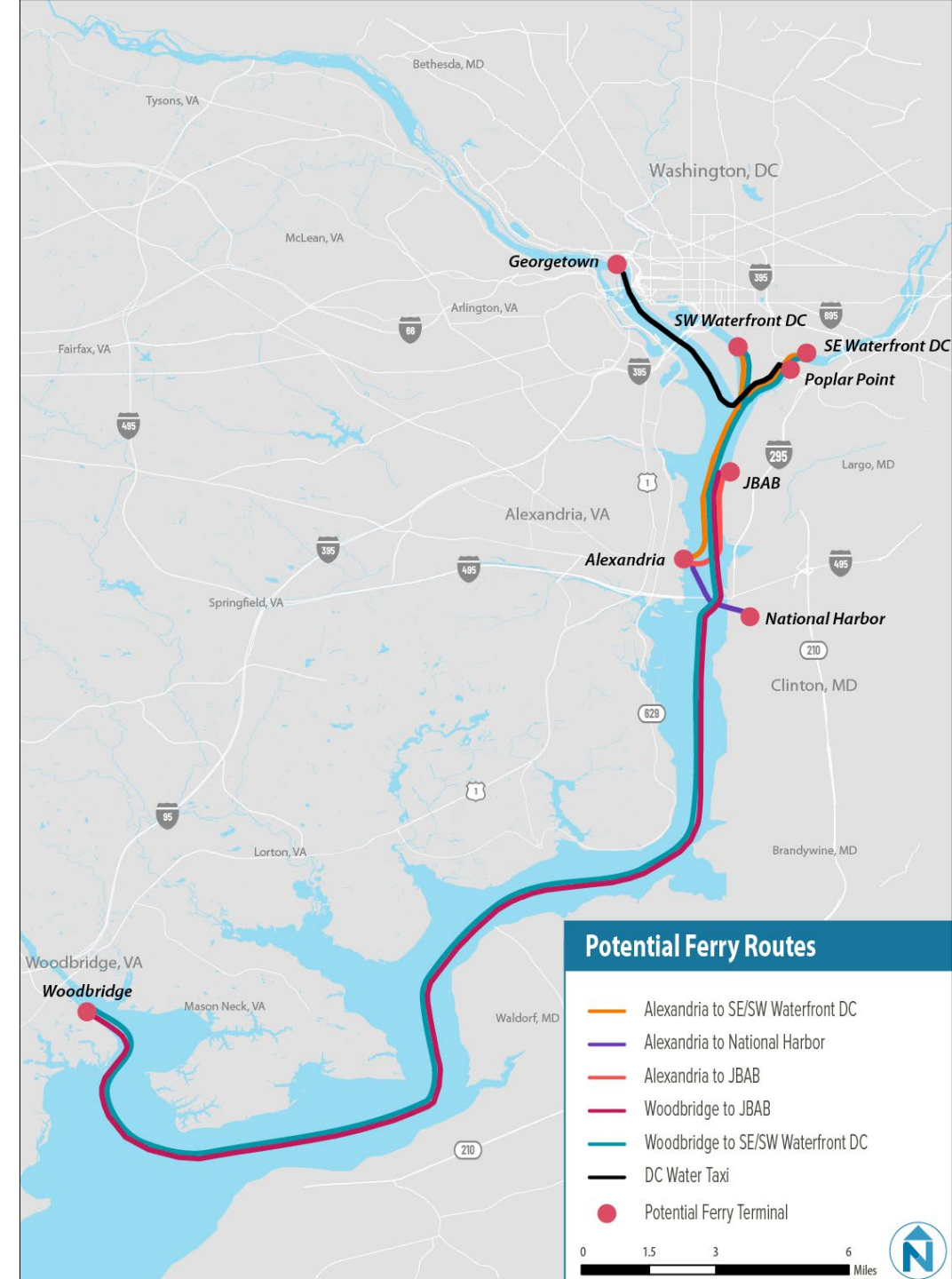




# Original Routes & Routes Identified as On Hold

TIER 1  
TIER 2

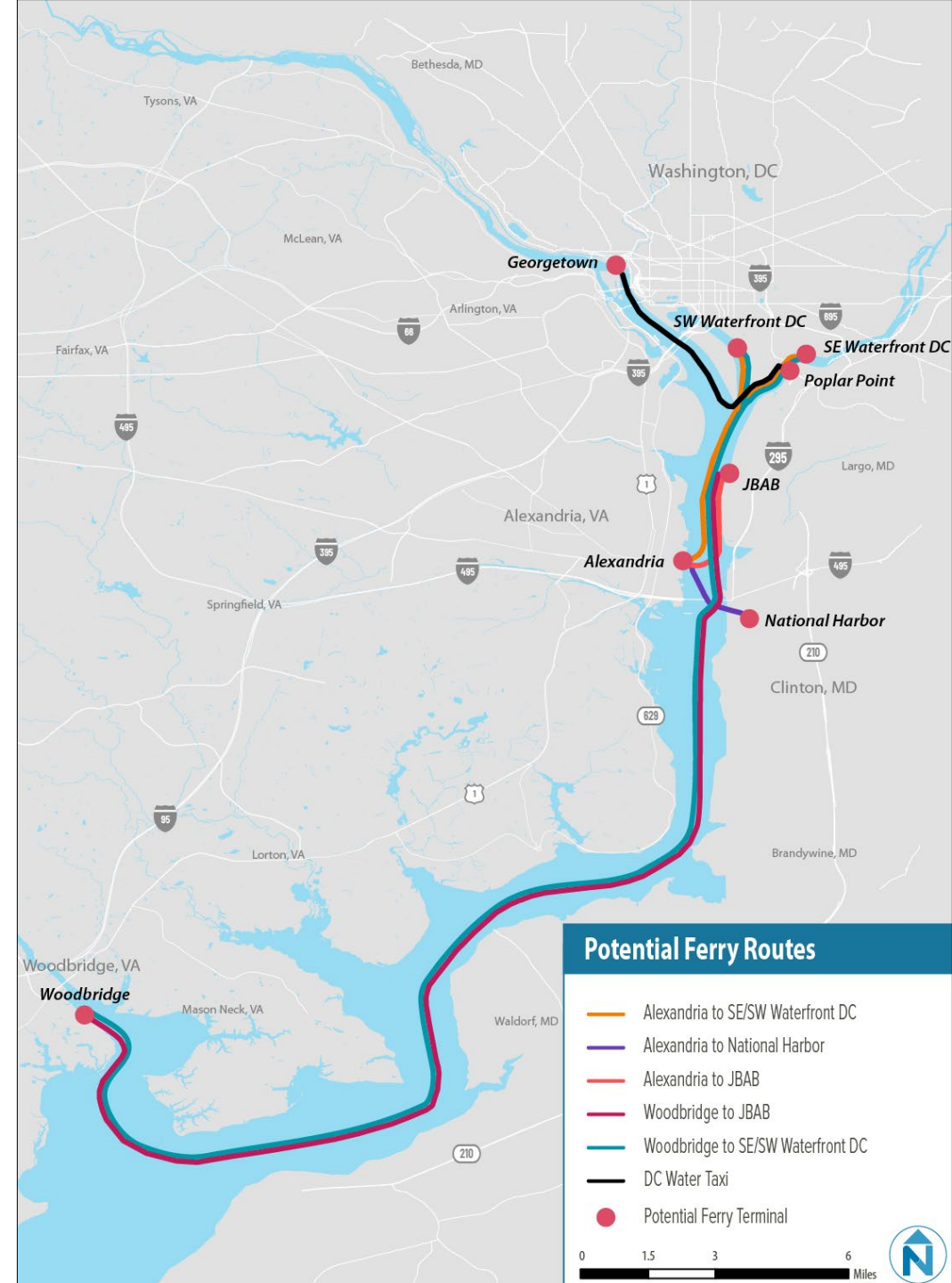
ID	Origin	Destination
1	Alexandria	SE/SW Waterfront DC
2	Alexandria	National Harbor
3	Alexandria	JBAB
4	Georgetown (DC Water Taxi)	Poplar Point
5	Woodbridge	SE/SW Waterfront DC
6	Woodbridge	JBAB
7	Charles County	Quantico
8	Charles County	SE/SW Waterfront DC
9	Charles County	Fort Belvoir
10	Charles County	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 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
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 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

	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		
Metro Service Area	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	✓	✗	✓	✓	✓	✓	✓
Regional Service	6	Charles County	Quantico	2	✓	✓	✗	✓	✗	✓	✓
	7	Charles County	Fort Belvoir	2	✓	✓	✗	✗	✗	✗	✗

# Route Selection Questions



<https://www.menti.com/algh6awf964w> code: **6298 3478**

# Investor Sounding



# Selecting External Stakeholders

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

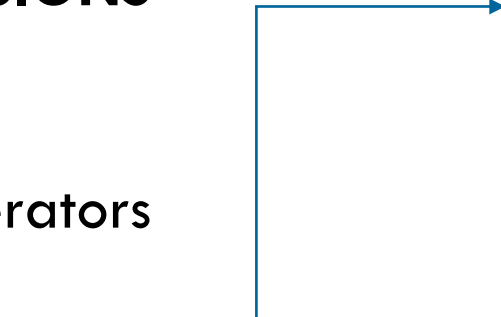
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Four market sounding sessions with a report documenting the sessions

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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
- Potomac and Rappahannock Transportation Commission (PRTC)

### Business Improvement Districts (BIDs)

- Crystal City BID
- Southwest BID
- Capitol Riverfront BID
- Georgetown BID

# Identifying Potential Stakeholders

## MARKET SOUNDING SESSIONS

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

# Investor Sounding Questions



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# 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

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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

**Questions? / Comments?**

**Next Steps**



# Overview of all tasks

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