

Trade Corridors of the BRAED Region Position Paper

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Battle River Alliance for Economic Development



Prepared by:





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Introduction

Before the recent downturn in the economy, the world economy had grown more in the five years previous 2008 than any other five-year period since World War II. As one of the most trade-reliant nations in the G-8, Canada has been benefiting from this global growth. By the end of 2006, exports and imports of merchandise had both hit record highs, reaching \$458 billion and \$404.5 billion, respectively. At the same time, the global economy had been changing significantly.

The North American Free Trade Agreement (NAFTA) and the European Union (EU) gave rise to new trading blocs that have underpinned the new integrated global marketplace. Coupled with the emergence of new economic powers such as China and India, global marketplace integration is driving the distribution of economic activity, as well as the expansion of world trade. The emergence of global supply chains as the preeminent business model is a key factor in global economic changes. Propelled by dramatic advances in information and transportation technology, leading-edge production strategies now feature deeper integration of research, design, sourcing, manufacturing, marketing, distribution and service dispersed across the globe. Commonly referred to as “integrative trade”, this new international business model uses lower trade barriers to distribute production around the world through out-sourcing and off-shoring to maximize efficiency and reduce costs of each component — taking advantage of global supply chains. These changes in how businesses operate have significant implications for transportation.

While both Alberta and federal governments have committed unprecedented levels of investment for infrastructure priorities, meeting these challenges will take more than public funds. A new emphasis on the transportation *system*, rather than any particular mode or element, is necessary to maximize the contribution of Canadian transportation to global supply chains.

Although the global economy is experiencing a slowdown, Alberta is expected to lead the country in recovery. This may not be at the same levels of unprecedented growth and investment as in 2006 and 2007 but it will continue to experience growth into the future. Further development is expected in the oil sands, in situ and heavy oils. All these industries are concentrated on the eastern side of Alberta. In order to develop Alberta infrastructure to meet the growth and challenges of the next 20 years, a second high capacity north south transportation corridor connecting the province directly with the US transportation system is vital. This paper will provide an analysis of the potential of a second corridor located in the eastern portion of the province.



Trade Corridors: Context & Definitions

Trade Corridors was first developed in Canada as a public policy project of the federal Department of Transport in the late 1990s. For some time earlier, Trade Corridors had been adopted by a number of regional, Canada-U.S. trade marketing initiatives describing themselves as Trade Corridors. This approach places transportation infrastructure at its core, but goes further to encompass other interconnected issues of public policy, regulation, and operational practice that directly impact how well the infrastructure works and how well Canada and Alberta takes advantage of it.

Definitions

Gateways and trade corridors are major systems of marine, road, rail and air transportation infrastructure of national significance for international commerce, within a defined geographic zone.

Gateway: a multi-modal entry/exit point through which goods and international passengers move beyond local, and even regional, markets.

Trade Corridor: a linear, multi-modal orientation of international passenger and freight flows that connect gateways to major markets.

Gateway and corridor strategies are integrated packages of long-term investment and policy measures that advance the development and exploitation of gateways and corridors for national benefit.

Impact of NAFTA US/Canada Trade

January 1, 2009 marked the 20th anniversary of when the Canada-US Free Trade Agreement came into effect (January 1, 1989). Twenty years ago, the focus of Canada's international trade policy was the United States economy, the largest market on the globe. Over 2 billion in trade is transported across the Canada/US border every day. Across Western Canada there are approximately 6,000 north-south truck trips per day. Alberta is western Canada's largest economy and transports over 80% of its exports to the US. From Alberta, exports to the US amount to about 5 billion annually (2007) and \$16 billion in imports from the US (2007). At the Coutts/Sweetgrass border crossing on the CANAMEX Trade Corridor truck volumes have increased on average of 9.1% per annum during the last decade (previous to the recent economic downturn).

The following statistical information provides a snapshot of the exports and imports of Canada and individual provinces:



Canada's Total Exports - Top 10 Countries of Destination - Latest 5 Years (000)

	2004	2005	2006	2007	2008
United States (U.S.)	136,385,226	154,421,379	189,229,515	139,596,919	103,170,101
Chile	108,021	245,844	354,683	772,133	1,908,116
New Zealand	219,103	191,863	358,906	263,924	1,896,574
United Kingdom (U.K.)	165,714	118,430	98,401	1,421,627	1,056,984
United Arab Emirates	239,278	62,982	443,328	1,511,629	968,608
Swaziland	--	--	--	--	550,314
Germany	19,570	16,547	147,867	228	470,438
Barbados	--	--	39,649	273,716	379,696
Australia	124,770	124,524	191,536	222,894	347,959
Ireland	316,427	217,764	14,004	614,859	300,135
SUB-TOTAL	137,578,109	155,399,333	190,877,889	144,677,929	111,048,925
OTHERS	3,346,188	4,188,923	4,999,091	3,293,533	2,656,597
TOTAL (ALL COUNTRIES)	140,924,297	159,588,256	195,876,980	147,971,462	113,705,522

Source of data: Statistics Canada
Report Date: 18-Mar-2009

Total Exports by Province of Origin - Latest 10 Years (000)

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
ONT	213,394,774	126,047,788	106,421,624	97,390,431	83,690,557	93,615,074	82,212,155	87,547,407	66,378,954	43,461,787
QUE	50,505,707	19,330,963	23,490,580	20,355,412	21,234,097	26,793,153	32,803,265	33,771,958	39,301,476	31,506,677
NB	35,061,415	18,936,307	9,231,170	8,682,918	6,153,258	5,767,431	14,585,569	28,556,877	13,484,918	22,488,454
BC	38,182,107	15,556,577	11,130,035	11,344,337	9,607,926	12,224,724	18,357,917	22,741,091	14,655,794	11,895,580
MAN	29,669,672	8,216,174	4,366,158	474,973	875,926	1,230,706	6,464,683	11,281,495	6,708,314	2,465,441
AB	8,806,553	3,736,895	1,546,347	1,725,023	768,103	1,202,921	4,796,399	7,604,466	4,828,895	1,848,468
NS	18,880,728	12,557,498	16,097,258	16,991,178	3,358,119	72,212	326,414	4,311,693	2,583,881	20,154
SASK	4,871,685	83,727	39,595	25,861	3,113	5,160	8,958	--	--	11,103
PEI	135,241	17,929	--	--	--	4,916	5,199	--	7,868	7,858
NFD & LAB	1,260,210	1,068,838	3,440	23,380	10,449	8,000	18,433	61,993	21,362	--
NUN	--	--	--	--	--	--	9,264	--	--	--
YKN	--	--	8,916	--	--	--	--	--	--	--
NWT	--	--	--	--	--	--	--	--	--	--

Source of data: Statistics Canada
Report Date: 18-Mar-2009

Canada's Total Imports - Top 10 Countries of Origin - Latest 5 Years (000)

	2004	2005	2006	2007	2008
United States (U.S.)	87,096,612	90,841,181	93,890,789	119,535,280	166,196,841
China	851,540	376,635	470,622	368,136	634,152
Re-Imports (Canada)	52,086	35,306	5,862	48,861	166,772
Italy (includes Vatican City State)	358,613	96,264	420,446	133,351	154,117
United Kingdom (U.K.)	260,072	587,502	149,287	120,393	150,909
Mexico	515,351	267,160	69,495	34,850	94,879
Hungary	523	777	45,000	--	60,000
Germany	22,734	14,973	8,238	16,647	33,980
Japan	7,348	4,662	7,049	4,074	23,779
Thailand	320,972	223,934	68,999	38,213	21,757
SUB-TOTAL	89,485,851	92,448,394	95,135,787	120,299,805	167,537,186
OTHERS	465,170	707,989	402,440	170,083	113,167
TOTAL (ALL COUNTRIES)	89,951,021	93,156,383	95,538,227	120,469,888	167,650,353

Source of data: Statistics Canada
Report Date: 18-Mar-2009

Total Imports by Province of Clearance - Latest 10 Years (000)

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
ONT	27,866,498	28,581,662	32,631,785	40,704,292	37,670,517	37,097,048	40,864,974	40,686,255	49,443,653	54,197,358
BC	9,613,184	8,738,973	16,519,744	18,861,149	33,528,249	35,552,557	30,961,813	31,906,817	32,162,790	44,644,780
QUE	2,393,933	1,800,747	1,189,635	3,889,433	1,481,093	1,008,911	1,963,219	1,075,549	8,518,757	27,068,951
AB	1,672,503	2,191,782	5,002,405	12,381,796	4,827,285	5,910,384	9,722,034	11,648,030	16,336,837	22,129,225
SASK	423,495	592,731	3,732,810	6,980,050	6,269,502	6,697,994	7,030,703	7,299,447	8,924,023	10,486,761
MAN	896,819	1,572,131	1,093,299	680,418	1,454,800	2,864,450	1,342,945	1,327,776	3,472,964	4,997,856
NB	449,157	484,688	620,966	731,235	547,782	811,738	877,474	1,589,980	1,608,698	4,108,089
NS	60,281	14,590	23,585	14,888	16,863	4,935	393,193	3,051	1,589	16,690
NFD/ LAB	--	--	20,673	--	--	300	--	1,322	577	643
PEI	--	--	--	--	--	--	28	--	--	--
YKN	--	1,997	--	--	--	2,704	--	--	--	--
NWT	--	--	--	--	--	--	--	--	--	--
NUN	--	--	--	--	--	--	--	--	--	--

Source of data: Statistics Canada
Report Date: 18-Mar-2009



Trade Corridor Examples

CANAMEX Trade Corridor

The term CANAMEX is drawn from the NAFTA country names Canada, America and Mexico. The CANAMEX Trade Corridor links three countries and stretches 6,000 kms from Anchorage Alaska to Mexico City. The Corridor was one of the first north south corridors designated as a high priority corridor under the National Highway Systems Designation Act. Alberta initiated CANMEX in the early 1990s and has continued to seek US cooperation on harmonization of regulations.

The goals of CANAMEX Trade Corridor are to:

- improve access for the north south flow of goods, people and information;
- increase transport productivity and reduce transport costs;
- promote a seamless and efficient intermodal transport system; and
- reduce administration and enforcement costs through harmonized regulations.

North South Trade Corridor (Canadian section of CANAMEX)

The North South Trade Corridor connects Alberta with the U.S. at Coutts, extends to the B.C. border west of Grande Prairie, and provides access to the Alaska Highway. To ensure Alberta's competitiveness in the international marketplace and enhance tourism, there has been continued investment in this high-efficiency, multi-lane corridor to access U.S. and emerging Mexican markets. Significant work has occurred on both rural and urban portions of the corridor throughout the province.

Central North American Trade Corridor

The Central North American Trade Corridor (CNATC) extends from both Alaska and Port Churchill in Canada and runs through the Canadian provinces of British Columbia, Alberta, Saskatchewan and Manitoba, continuing through North Dakota, and extending south of the border to Mexico City. CNATCA is mobilizing the corridors' assets and resources to spark: Economic Growth, Rural Revitalization, Infrastructure Development, Public/Private Investment, and International Trade.



The surface trade flows (by truck and rail) circulate along Highway I-25 in the United States which, together with Highway I-90, brings the corridor north to Montana. Plans are to continue the Camino Real to Great Falls, where the corridor could join up with CANAMEX, a North American highway project, to enter Canada.

Mid-Continental Trade Corridor/NASCO

One of the key trade corridor initiatives for Canada is the Mid-Continental Trade Corridor. Manitoba's position at the heart of North America makes it a key part of the Mid-Continent Trade Corridor, connecting Canada to a central North American market of 100 million people. Through a system of connecting highways and rail routes, the corridor provides seamless and efficient transportation linking major commercial centres in the Canadian and American Midwest, through the Southwest, and deep into Mexico.

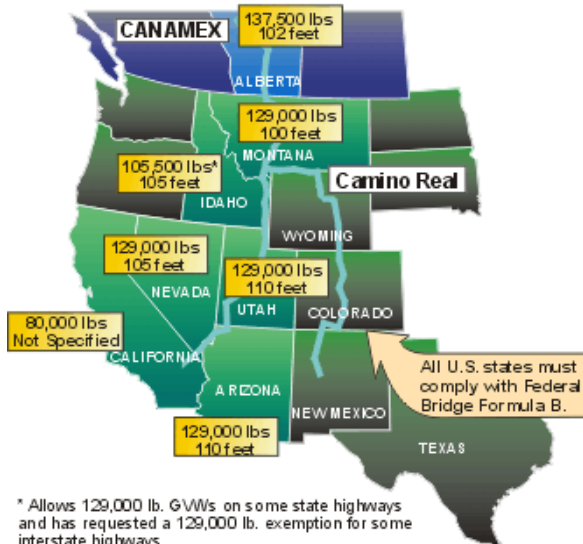
To advance the development of transportation infrastructure and economic development along the Mid-Continental Corridor, MIT/Transportation Policy and Service Development are members of NASCO (North American Super Corridor Coalition). NASCO is a nonprofit organization dedicated to increasing economic development activity while supporting multi-modal infrastructure improvements, technology / security innovations and environmental initiatives along the NASCO Corridor, in addition to stimulating the dialogue between the public and private sectors about critical, corridor-wide trade and transportation challenges.

State/Province Truck Standards

Alberta's high-standard highway system routinely handles trucks of up to 3,500 kg (140,000 lb.) and provides links with all major Western North American markets. With exception of those states with grandfather rights, currently the U.S. restricts the allowable gross weight and length of trucks. Long Combination Vehicles (LCVs) are limited to western states. State laws and policies determine use and vary considerably across the west.

Higher truck weights and dimensions (Turnpike Doubles and Triples) provide shippers with the lowest possible unit cost for transporting their goods. There are proposals to harmonize truck weights and dimensions along specific U.S. Interstate Highway Corridors.

State Standards for Gross Vehicle Weight & Lengths



Source: Alberta Infrastructure and Transportation

Federal Initiatives

A \$1 billion Federal Asia-Pacific Gateway and Corridor Initiative was announced in October of 2006. This gateway and corridor is a system of transportation infrastructure, including British Columbia Lower Mainland and Prince Rupert ports, road and rail connections that reach across Western Canada and into the economic heartlands of North America, as well as major airports and border crossings. The initiative involves investment and policy measures focused on trade with the Asia-Pacific Region. Its mission is to establish Canada's Asia-Pacific Gateway and Corridor as the best transportation network, thereby facilitating global supply chains between North America and Asia.

In November 2007, the Federal Government announced Building Canada; a long-term infrastructure plan including a national fund for gateways and border crossings with \$2.1 billion over seven years. Funding investments made by the Federal government under this fund are guided by the National Policy Framework for Strategic Gateways and Corridors.

BRAED's Regional Growth Highways

Highway 36

Highway 36 or Veterans Memorial Highway is a north-south 681 kilometer highway that connects southern Alberta to Northern Alberta.

It starts in southern Alberta just above the Coutts (Alberta/Montana) Border Crossing and ends near Highway 55 by Lac La Biche.



Coutts Port of Entry

- Entry to the United States (near highway 36) located one hour south of Lethbridge.
- Coutts is the only 24 hour port of entry in Alberta.
- Over 1 million travelers passing through every year and nearly 500,000 trucks.

Highway 41

Stretching along Alberta's eastern border, the Buffalo Trail (Hwy 41) takes its name from the vast herds that once roamed these plains.

Highway 41 (also called Buffalo Trail) is a 686 km long north-south highway located in eastern Alberta, extending from the hamlet of La Corey (west of the City of Cold Lake along Highway 55) to the United States border at the hamlet of Wild Horse.



Wild Horse Port of Entry

- Entry into the United States (Highway 41).
- Supporters from both sides of the border seeking it as a 24 hour port of entry (key to develop the corridor).
- Starting this year the Port of Wild Horse will begin its expanded summer schedule nearly three months earlier than normal on the American side.
- The Canadian government has not yet agreed to expand hours at its Wild Horse port of entry.

The Case for a 24 Hour Port at Wild Horse

- Based on potential resource projects in Alberta it is estimated an additional 4 billion of machinery and equipment will need to be imported every year by truck
- This represents approximately 40,000 truckloads per year over and above current volumes
- Within 10 years this would translate to 200,000 truckloads inbound to Alberta from the US every year
- For Coutts and the highway 2 corridor this means an inbound truck every 3 minutes 24/7 365 days a year

Setting Growth Priorities

Industrial Equipment and Machinery Manufacturing

- Manufacturing is one of the largest industries in the province.
- In 2006 the value of Alberta's manufacturing shipments climbed to 64.4 billion.
- The industry machinery and equipment sector accounting for approximately 21% or 13.2 billion.
- Central Alberta specializes in manufacturing equipment operations in agriculture, oil and gas, storage, fabrication and special purpose vehicles.
- Growth Priority
 - Increase demand on industrial equipment that present opportunities in the expansion of new technologies.



Agricultural Secondary Processing

- Besides a strong primary agricultural sector, Alberta also has an expanding value-added agricultural products sector.
- In 2006, manufacturing shipments of Alberta's food and beverage processing industries reached \$9.6 billion. Meat product manufacturing accounted for more than half of the sector's shipments
- Growth Priority - Secondary processing of agricultural products/Bio-energy

Petroleum Resources

- In 2006, energy resource exports accounted for \$56.8 billion of Alberta's exports, about 64 per cent of Alberta's total exports of goods and services in that year.
- Alberta produces 70% of Canada's crude oil and 80% of its natural gas. Including oil sands, Alberta has the second largest petroleum reserves in the world, second only to Saudi Arabia.
- Production from oil sands is expected to nearly triple from current production of 1.1 million barrels per day to close to 3.0 million barrels per day by 2015.
- Growth Priority - Petroleum Processing



Tourism and Recreation

- Total tourism revenue in 2006 was \$5.15 billion, an increase of 0.6% from the estimated 2005 figure.
- Of the \$5.15 billion, Alberta residents accounted for \$2.49 billion or 48%. Residents of other Canadian provinces accounted for \$1.24 billion (24%), while international visitors spent \$1.42 billion (28%) in Alberta.
- Growth Priority – Agriculture Tourism

CFB Wainwright

- CFB Wainwright is the centre for excellence for Canadian Army training.
- There is a substantial amount of local procurement being done by the three military bases in the Eastern Alberta corridor, amounting to approximately \$9.7 million annually in goods and services supplied by local and regional firms.
- Growth Opportunity
 - Local Procurement Opportunities



Logistics and Goods Flow/Truck Movement

- 82 percent of the truck-delivered exports from the United States to Alberta currently flow through a single port, the 24 hour-hour commercial Port of Sweetgrass, Montana/Coutts, Alberta, with links to Edmonton and the oil sand areas only through the congested, urbanized Calgary corridor;
- This represents approximately 40,000 truckloads per year, over and above current volumes and the normal forecast growth is 30% over the next 10 years;
- All told, within 10 years this would translate to approximately 200,000 truckloads inbound to Alberta from the US every year;
- Given current patterns, 170,000 of these would come in through Coutts. For Coutts and the Highway 2 corridor, this means an inbound truck every 3 minutes – 24/7 365 days/year;
- For the current corridor, this is additional to intra-provincial and interprovincial truck traffic using the corridor, plus US inbound traffic entering through other crossings;
- Texas and other Gulf Coast states represent the largest, and fastest growing points of origin for truck-delivered exports passing through Sweetgrass;
- US truck drivers use their own highway system as long as possible;
- The strong presence of Canadian Military Bases in the Alberta Eastern corridor realize the benefits of the Wild Horse 24-hour border crossing as it would permit a more direct flow of US logistic elements in support of their activities.



Future Economic Potential

Although the world economy is experiencing an economic downturn, there are already positive signs of it returning to normality. Alberta will continue to grow and in preparation of this growth, it is imperative that a second high capacity north south transportation corridor connects the province with U.S and Mexico. The Coutts port of entry experiences heavy bottlenecks that translate to trucking and business downtimes which affect corporate bottom lines.

Investment and development of the oil sands, in situ and heavy oils is concentrated on the eastern side of the province and is limited due to the present situation of only one 24 hour port of entry into Alberta. In comparison, British Columbia has six 24 hours ports of entry and Saskatchewan and Manitoba have two. Much of the required components of an alternative U/S Canada trade corridor are in place including excellent but underutilized highway infrastructure (including Montana side), political willingness to develop a corridor, industry support and community readiness.

Benefits of an eastern trade corridor include:

- An additional trade corridor along the eastern part of the province will keep pace with the future growth of Alberta and reduce the heavy traffic pressures along the highway 2 corridor.
- Highways 36 and 41 in its present configuration can handle large volumes of traffic and are time and cost effective routes for heavy equipment transport to eastern Alberta and Fort McMurray.
- Create new tourism traffic and opportunities along eastern Alberta which were previously unrealized due to limited access by US tourists.
- Support and create new economic opportunities for industry and communities along eastern Alberta. (i.e. assembly for oil sand equipment along the corridor)

Stakeholder Management

The adoption of a stakeholder approach to managing a larger project of this nature will contribute to the overall success of the project. Positive and mutually supportive stakeholder relationships encourage trust, and stimulate collaborative efforts that lead to greater advocacy and commitment. The following are factors to consider when using a stakeholder management approach:

Factors of Consideration of Stakeholder Management

- Acknowledge and actively monitor the concerns of all legitimate stakeholders and take their interests appropriately into account in advocacy and decision-making.
- Listen to, and openly communicate with stakeholders about their respective concerns and contributions, as well as the risks they assume are part of their involvement with the project.
- Adopt communication processes and modes of behavior that are sensitive to the concerns and capabilities of each stakeholder.
- Work cooperatively with other entities, both public and private, to ensure duplications, risks and harms arising from activities are minimized.

Potential Stakeholders

- Member municipalities
- Other eastern Alberta REDAs
- Province of Alberta (Alberta Transportation, Alberta Infrastructure, Tourism Alberta)
- Government of Canada
- Major industry players within the region
- Communities along highway 36 & 41
- CFB Wainwright





Conclusions and Critical Enablers

Moving trade in Alberta is at the heart of our economic, social, and community prosperity. Alberta's eastern highway systems are underutilized and could potentially become an effective alternative corridor to the already busy Highway 2 Corridor. For any corridor strategy to succeed, it will take more than simply investing in infrastructure at ports, airports and roads. A corridor strategy should not only be about facilitating transshipment in moving goods through the region but also be about creating value added services. It must work to harmonize the large federal, state, provincial and municipal jurisdictions in three countries to simplify regulatory logistics of movement. Also communities and industries along the eastern part of the province must be committed and willing to be a part of the building of the corridor, which may have potential impacts.

The following are conclusions/critical enablers to assist in building a trade corridor along the eastern part of Alberta:

- Advocate towards the Wild Horse Port of Entry to become a 24 hour port of transportation.
- Facilitate increased involvement from all REDAs impacted along eastern Alberta.
- Develop a benefit analysis and advocacy paper to be used as a decision making document for the Federal Government.
- Develop a federal, municipal, provincial, industry working group to develop the parameters, outcomes and implementable solutions towards developing a trade corridor in eastern Alberta.
- Create an corridor assessment exercise with all REDAs in eastern Alberta to examine the following:
 - areas along highway 41 or 36 that require improvements,
 - present traffic volumes
 - identify industries/businesses that would add value or benefit from a corridor
 - communities along highways 36 and 41 that are corridor ready



Sources

Although there are other sources of information reviewed, the following are the key sources used in the development of this plan.

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