



MDS Transmodal[™]

Local and Global Transport and Logistics Research

CAPABILITY STATEMENT

Ports & Shipping

March 2009

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MDS TRANSMODAL

Company Background

MDS Transmodal was established in 1983 and has developed into a unique business, providing specialist consultancy and information services to the world's transport industry. Our main activities are concentrated in the freight transport market and cover ports, shipping, road and rail, logistics and distribution. We also have expertise in inland waterway transport, airfreight and international passenger travel.

MDS Transmodal has developed an unparalleled range of information services as the basis for specialised consultancy services, as well as a source of intelligence for commercial companies and public sector authorities. This allows us to complete expert and well-informed studies in the shortest possible time. Our data store includes: a comprehensive time series of world foreign trade statistics; the *Containership Databank*, which is a recognised reference for the world container shipping industry; and a global database of the world's container ports and terminals. All of these can be interrogated at multiple levels of analysis according to clients' needs. Alongside the data we have developed an econometric trade forecasting system and a number of transport models, some bespoke to particular projects, while the *Great Britain Freight Model* has now been adopted as part of the UK National Transport Model.

MDS Transmodal undertakes a wide range of consultancy projects in the UK and internationally. Projects range from trade and traffic forecasting at the national level and for specific routes, or commodities or projects, to feasibility studies for new facilities or shipping services, to planning and policy advice. Our clients are drawn from the public and private sector and include transport providers, transport organisations, port companies and operators, local and regional authorities, central government, financial institutions, property developers, trade associations and other organisations with interests in transport-related issues.

For more information about our company please visit our website at www.mdst.co.uk

Consultancy Services

Ports

MDS Transmodal undertakes commercial studies for ports throughout the world. The company has 25 years of experience in this field. We carry out:

- National and international trade and port traffic forecasts
- Investment appraisals
- Due diligence studies
- Long term strategic planning studies
- Analysis of trade and passenger flows and market opportunities
- Traffic and revenue forecasts
- Feasibility studies for new ports, new terminals, and new facilities
- Operational and infrastructure studies in the port and rail sectors
- Analysis of the market potential for new shipping services
- Studies on the development of inland linkages

Projects concerning the development of new facilities are often tackled on a co-operative basis with an engineering consultancy. Our contribution covers the relevant market aspects, from the types of cargo that the port could attract, to potential interest from shipping lines in cases where liner trades are involved. This type of approach means that we are often the first consultancy contacted by potential developers/investors since the results of the market study will not only define the nature of the port facilities but also whether the project is financially attractive

Shipping

Shipping companies are constantly seeking new market opportunities. Projects typically cover the examination of new route structures where our role is to give advice on the volumes of cargo available, current market prices, competition and all the items relevant to a full feasibility study. Occasionally, near-launch planning is also required, leading to cash flow analysis and other financial projections. Although **MDS Transmodal** has handled feasibility studies for all types of cargo – bulk and unitised - we have become particularly well known for our work in the ro-ro and container sectors.

MDS Transmodal has recently advised on:

- Due diligence on the purchase of a GB ferry company by a private equity fund

- The logistics strategy in Britain for a major deep sea shipping line
- Rail ferry projects on the North Sea and between South Korea and China
- Development of integrated car carrier/general cargo/container roro services in Western Europe
- Cross Channel ferry services
- Lolo services between Britain, Ireland, the NW Continent and Iberia
- Inland waterway services on the Continent
- Coastal services along the British coast
- Inland waterway cruising in Europe
- The sale of an Irish Sea ferry operation

Typically carriers are examining new route structures and our role in these cases is to advise on the volumes of cargo available, current market rates, competition and all the items relevant to a full feasibility study. Although the majority of projects undertaken have been in Europe, we have also evaluated services in the Americas and Asia.

MDS Transmodal also provides advice to such organisations as:

- *Financial Institutions* - due diligence, market analysis, financial modelling
- *Governments and EU* - promotion of short sea shipping, telematics, regional development
- *Local and Regional Authorities* - local (island) ferry service provision

In the context of work for financial institutions MDS Transmodal has given advice on ports and shipping, conducting due diligence concerning the business dynamics and competitive position for several prominent port groups as well as advising on the likely prospects for panamax containerships for a potential investor.

MDS Transmodal has been involved in the study and promotion of **short sea shipping** in the UK for some time and now plays a leading role in providing advice and statistical support to Government through the Sea and Water organisation.

Trade data and forecasts

MDS Transmodal maintains a comprehensive **world trade database** comprising the foreign trade statistics of **all** countries and **all** commodities to SITC 5 digit level, covering the period from 1996 to the current quarter.

Trade data is the fundamental element in establishing market size and thence analysing market share. For any company entering a new trade, or monitoring an existing route, accurate and timely data showing market trends should be the basis of decision-making. For many port and shipping projects the trade statistics provide base data from which cargo flows can be analysed.

MDS Transmodal has developed a methodology to produce long-range forecasts of containerized and non-containerized maritime trade. The maritime trade database includes detailed estimates of the volume of loaded and empty containers by TEU on a country-country basis associated with each 5-digit SITC commodity classification.

Forecasts are also generated for non-unitised cargoes including bulk and break-bulk commodities.

Modelling for Container Ports and Container Shipping

■ LINCOST MODEL

LINCOST was developed to model liner services from short sea ferry to deep-sea containers. Analysing these services is more complex than analysing bulk carrier trades: liner services pass through many ports picking up and dropping off cargo en route, while bulk trades are usually confined to origin/destination trades. The ability to model this complexity can be very useful.

LINCOST has been used successfully on numerous projects, especially in Asia and the Americas. It is particularly powerful in assisting ports in understanding shipping line behaviour and in showing the cost-effectiveness of adding or dropping ports in an itinerary. Another common use is in quantifying the number of units required for a direct call by a mainline vessel, rather than by a feeder. For example, in 2005, it was used for a UK Government project assessing the opportunities for container transshipment in Britain and value that it adds to the UK economy.

Container shipping data

For the last 20 years **MDS Transmodal** has been a key source of specialist information on container ports, containerships and their deployment, liner services and forecasts of capacity. The databases developed form key inputs into consulting projects in this sector.

■ **Containership Databank:** The world standard database of containership information contains operational details of the world container carrying fleet and 30 fields of information for every vessel, including operator, service, route, TEU, service frequency, port rotation and much more. The service deployment of individual vessels in the fleet frequently changes. The Databank tracks these changes, providing updated issues every month, and is an essential tool for anyone concerned with monitoring the container industry. The Databank has been produced since 1985 thus enabling a wide range of historical analyses to be undertaken.

■ **Container Capacity Forecast (CCF)** builds on the information in the *Containership Databank* to provide a three-year prediction, by quarter, of vessel deployment on individual services on the main arterial routes - Transpacific, Transatlantic and Europe/Far East. The **CCF** takes account of all known vessels on order in developing the forecasts and also the impact of

vessel displacement, as the "cascade effect" shifts vessels from route to route. The output of the **CCF** consists of summary tables for each route, eastbound and westbound separately, by service string. In addition, a list of route allocation factors applied is provided together with a brief commentary by service on vessel deployment and redeployment.

Overseas Port Projects

The table gives some examples of port projects undertaken outside the UK in the last ten years.

Year	Port	Partner(s) if any	Client	Job details
2008	Various Continental terminals		Private client	Assessment of BBI Euroports with a view to a potential acquisition.
2008 - ongoing	Dublin Port Study	INDECON	Department of Transport	MDST in association with Indecon has been appointed to undertake a study of options for the long-term development of the Port of Dublin. This will encompass assessment capacity and future need, inland transport implications and evaluation of options for the relocation of the Port.
2007	Vizhinjam (India)	None	Private client	Independent assessment of prospects for new container terminal in Kerala State (India) on behalf of private investor.
2006-07	Saudi Arabia - Jeddah/Dammam	Arup	Private client	Revenue consultants for the Saudi rail landbridge project, working with one of the bidders. Included port assessments and traffic forecasts.
2006-07	Various	None	Private equity funds	Several commercial due diligence projects with respect to: purchase of shares or acquisition of international port and terminal operating groups
2001-2005	New York/New Jersey	Halcrow	CPIP Consortium	Comprehensive Port Improvement Plan. Market forecasts including forecasting US trade, testing different channel depth scenarios, inland cost models by mode etc.
2004	Cochin	None	ICTSI	A comprehensive review of Indian container flows, with specific reference to the port of Cochin. The study was particularly concerned with inland competition and a detailed analysis of distribution costs was included as part of the study.
2004	Bahrain	None	Private client	Gulf Container Market Study, with particular reference to Bahrain and potential for transhipment
2004	Sillamae (Estonia)	None	Private client	Sillamae Container Port Feasibility: analysis of potential for container ports in Estonia
2004	Derince (Turkey)	Halcrow	Turkish State Railway Corporation (TCDD)	Derince Port Masterplan Study. MDST provided 20-year port traffic forecasts and port market study for the reconstruction of a port in the Izmit Bay earthquake zone.
2003	Beirut (Lebanon)	None	Private client	Port of Beirut Market Study: study of container market potential (transhipment and transit) for an international port development company.
2001	Tarragona	None	ICTSI	Study of potential for a new container terminal located with the port of Tarragona, Spain.
2001	Djibouti	Posford Duvivier	Dubai Ports International	Djibouti transhipment port potential: Market appraisal to assess the potential for

Year	Port	Partner(s) if any	Client	Job details
				development of a new container transshipment terminal at the port of Djibouti, East Africa.
2000	Gibraltar	None	Government	Major study of the redevelopment of the whole port of Gibraltar, including shortsea, container and cruise facilities. Recommendations on management restructuring, tariffs and facilities
2000	Shannon	None	Shannon Development Corporation	Prospect for Shannon to become a Deep Water transshipment hub.
1999	Gdansk, (Poland)	None	ICTSI	Feasibility of the development of a deepsea container port adjacent to existing port at Gdansk. Quantification of container market in East Europe and the Baltic; identification of potential users
1999	Laem Chebang	None	ICTSI	Advice concerning open bidding for new container terminals within the existing port. Key issues include forecasts of traffic, impact of extra capacity on tariffs, inter-terminal competition.
1999	Manila (Philippines)	Halcrow	PPA	Large study covering the development of the North Harbour at Manila. Advice on all aspects of the 1998 development – commercial, physical and organisational – were included in the port project.
1999	Selaata (Lebanon)	None	Private client	Development plan for Selaata, concentrating on the main bulk and semi-bulk cargoes moving within the Eastern Mediterranean. Quantification of transit traffic for Syria, Jordan and Iraq was of major importance.
1999	Suape (Brazil)	F.R Harris	IFC	Very similar to the Sepetiba project, but covering only Northern Brazil.
1999	Valencia	None	ICTSI	Future for container traffic at Valencia, bearing in mind port competition within the Mediterranean. Especially involved with Spanish intra-regional traffic flows and forecasting future patterns.
1998	Al Taweela (Abu Dhabi)	Posford Duvivier/Bechtel	Government	Potential multi-purpose industrial port development in Arabian Gulf. Advice concerning main commodities traded in the region, requirement for new primary industries, as well as downstream products. Indications on developing an industrial park linked to the port
1998	Alexandria (Egypt)	None	ICTSI	Potential for improved efficiency at existing container facilities at Alexandria/Dekheila. Concentrating on economic aspects, tariffs, cashflow etc.
1998	New Orleans	F.R. Harris	Port Authority	A study of the “Port Millennium” project at the head of the Mississippi. Computer modelling was used to examine the relative

Year	Port	Partner(s) if any	Client	Job details
				attraction of different locations and the competition vis-à-vis other US Gulf ports.
1998	Port Said (Egypt)	Halcrow	Government	Potential for the development of a new port within the Suez Canal, opposite the existing Port Said facilities. Identification of potential users and forecast of traffic by type.
1998	Saida (Lebanon)	F.R. Harris	Private client	Likely use of Saida (Sidon) if developed as a container transshipment facility. Advice on potential users and tariffs.
1997	Adabia (Egypt)	None	Petra Navigation	Investigation of market for a small container port on the Red Sea. Advice on optimum facilities required and tariff levels.
1997	New York/ New Jersey	F.R. Harris	Port Authority	A similar study to New Orleans, carried out as part of a masterplan for the NY/NJ port authority, focusing especially on Asian container traffic.
1997	SePETIBA (Brazil)	Bechtel	Regional Authority	Use of SePETIBA as a load centre for containers for East Coast South America. Computer modelling of the direct service versus transshipment options and identification of optimal service scenarios.
1997	Subic Bay (Philippines)	None	ICTSI	Evaluation of container traffic potential at Subic Bay, taking into account the impact of the adjacent freezone. The quantification of local and transshipment cargo.
1997	Tangier	Bechtel	Bechtel (bid)	Potential for a new port at Tangier for container transshipment, covering the West Mediterranean area.
1996	Aden	Posford Duvivier	ICTSI	Major study of development of deepsea container facilities at Aden. Quantification of market, main potential users, tariffs and facilities
1996	Piraeus	NERA	Bank	A major privatisation study of Piraeus, covering operational, economic and physical aspects. Particularly involving methods of privatising individual terminals within the port.

Selected UK Project Experience

SUBJECT OF STUDY	DATES	CLIENT
Mersey Superport economic study.	2009	Mersey Partnership
Assessing the long term potential of the Ports of Fowey and Par	2009	Cornwall County Council
Forecasts for Southampton Masterplan	2009	Associated British Ports
Commercial due diligence on target port acquisition.	2009	Private client (Infrastructure fund)
Severn Barrage economic impact study; impacts on ports and shipping in the Severn estuary.	2008	DTZ Peda
Mersey Docks Strategy - Strategic study for the Mersey Docks complex encompassing the Port of Liverpool, Birkenhead and the Manchester Ship Canal. Including port traffic forecasts, future land requirements, assessment of opportunities for portcentric distribution, review of the national and local planning frameworks	2008	Peel Ports
Strategic Study for Medway Ports - Study of market opportunities, competitive analysis, assessment of land requirements and implications of public planning policy.	2008	Peel Ports
Inland transport implications for a major deep sea container port. Modelled analysis of the inland distribution of maritime containers from the proposed new facility using GBFM. Consideration of rail freight issues; freight rates to key inland destinations; key issues with regards to road haulage; forecast of container volumes by origin and destination region, and a forecast road/rail modal split.	2008	Port of Bristol
National Strategy for a deep sea container line - The objective was to determine a long run strategy that minimises unit cost subject to acceptable levels of service. Cost modelling of inland distribution of import/export containers, rail freight/road haulage/feeder ship scenarios, consideration of UK port performance and capacity.	2008	Private client
Newhaven Masterplan – contribution to the ‘Physical Development Vision for Newhaven’ study led by BBP Regeneration. Assessment of the economic role of Newhaven Port, future of commercial cargo handling activities, and ro-ro operation.	2008	SEEDA/Lewes DC/ East Sussex & Hove CC
Port based distribution project (207030)	2007	Port of Dublin
Par Docks Regeneration Study – Assessment of the commercial market opportunities for Par Docks and the Port of Fowey, following the impending cutback in clay export activities by Imerys. Also considered the potential of the cruise and marine leisure sectors.	2007	SWRDA/Restormel Borough Council/Cornwall Enterprise
UK Port Demand Forecasts to 2030, a major study to produce 25-year national port traffic forecasts for the Department for Transport. This research involved econometric modelling to produce forecasts of unit load traffics and market studies and a consultation exercise to develop non-unitised forecasts for all broad commodity types up to 2030. The report has been published in parallel with the DfT’s Ports Policy Review consultation document.	2006	Department for Transport
Port of Shoreham Masterplan - MDST was commissioned to undertake a study of the current operational activities of the Port of Shoreham to inform the preparation of a	2006	SEEDA

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Mersey Superport economic study.	2009	Mersey Partnership
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Commercial due diligence on target port acquisition.	2009	Private client (Infrastructure fund)
wider regeneration project focussed on and around the Port. Key components of the study included: <ul style="list-style-type: none"> • Port market appraisal, including new markets and provision of port traffic forecasts to 2025 • Quantification of the minimum requirement for land and quays, essentially to be provided by land reclamation, in order for the port to continue its present operation and to allow for future growth; • Exploration of the potential synergies that may exist between Shoreham and the neighbouring Port of Newhaven and the scope for potential for the consolidation of activities; and • Economic study of the contribution made by the Port to the regional and sub regional economy and its industries. 		
MDS Transmodal provided technical port operational advice to assist Thanet District Council and BBP Regeneration consultants in discussions with the developers of the London Array Windfarm off the North Kent coast. The advice included: <ul style="list-style-type: none"> • Appraisal of current commercial cargo-handling activities at the port of Ramsgate and prospects for the Port; • Examination of Windfarm related port activity, calculation of port land requirements; • Comment on the additional business opportunities that the construction of an alongside quay at Ramsgate may lead to. 	2006	Thanet District Council
The case for investing in Panamax container vessels for the charter market	2006	Private equity company
Containerport Transshipment Study- study of the economic costs and benefits of transshipment to the GB economy. Involved testing of different scenarios of GB deep sea container port supply and lolo traffic forecasts to 2030. The report has been published in parallel with the DfT's Ports Policy Review consultation document.	2006	Department for Transport
IMPACTE – INTERREG IIB funding application	2006	SEEDA
Transport Case for a Sustainable Resource Recovery Park at Ince: employed to develop the case for a water and rail linked industrial recycling development on the Manchester Ship Canal.	2006	Peel Holdings
Port Salford: Case for a road, rail and short sea container terminal at Salford on the Manchester Ship Canal (Port Salford).	2006	Peel Holdings
An Evidence Based Strategy for Northern Ports	2006	Yorkshire Forward
Purchase of Teesport	2005	Private equity consortium
Purchase of Mersey Docks & Harbour Company	2005	Private equity company
Financing of takeover of Mersey Docks group	2005	Peel Holdings
Sale of 49% stake of port group	2006	Peel Holdings
Purchase of Associated British Ports	2006	Goldman Sachs
Port of Blyth Market study – update of 2003 port forecasts as part of the ongoing Blyth Estuary regeneration study. Review of Harbour Commissioners' business plan.	2005	English Partnerships
North West Ports Economic Trends & Land Use Study	2005	NWDA

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Mersey Superport economic study.	2009	Mersey Partnership
Assessing the long term potential of the Ports of Fowey and Par	2009	Cornwall County Council
Forecasts for Southampton Masterplan	2009	Associated British Ports
Commercial due diligence on target port acquisition.	2009	Private client (Infrastructure fund)
Newhaven Eastside Economic Masterplan – provision of specialist advice to RTP on the commercial operation and business opportunities for the Port of Newhaven as part of a wider economic Masterplan being carried out for the port owners.	2005	Roger Tym & Partners
Rye Harbour Economic Appraisal: Commissioned together with Roger Tym & Partners to undertake an economic appraisal of Rye Harbour, including a detailed review of the role and contribution of the port to the Rye economy, an assessment of commercial prospects and the provision of advice on possible sources of funding	2004	Rye Partnership
The study examined the market size and segmentation for all container traffic with an origin or destination in Scotland carried by feeder and shortsea shipping services, by rail and road. The study included market research, demand modelling using the GB Freight Model and strategy recommendation.	2004	Forth Ports Plc & Scottish Enterprise
NW Ports Stakeholder Study: presented a summary of institutions, legislation and policies relevant to the sustainable development of ports in North West England and North Wales, including environmental, economic and transport-related issues.	2004	English Nature & Countryside Council for Wales
South Tees Development Options: Study involving preparing a series of options for the development of a number of strategic sites in the River Tees Corridor in the light of increasing rationalisation of steel making on the Tees.	2004	One North East
Case for outer harbour scheme at Great Yarmouth	2001-04	Great Yarmouth Port Authority/Eastport
The economic of impact of light dues in the UK; included analysis of factors affecting level of transshipment of UK deep sea container traffic on the Continent	2003-04	Department for Transport
Scottish Container Market Analysis: policy & market analysis; competitive environment; customer perceptions	2004	Forth Ports PLC & SE Forth Valley
MDS Transmodal completed port traffic forecasts to 2034 for all traffics as part of the Dover Masterplan phase I. The work focussed on ro-ro passenger and freight forecasts but also included fresh produce, cruise, aggregates and marine leisure and involved scenario development, market research and stakeholder consultation and modelling using the GB Freight model	2003	Port of Dover
The need for inland infrastructure to serve GB container ports	2003	Maersk Sealand
Demand forecasting for Phase I of Master Plan, including high-level assessment of potential for deep sea container terminal.	2003	Dover Harbour Board
Viability of Falmouth Docks: Examination of the future viability of Falmouth's ship repair, cargo handling and cruise businesses in the light of the ports development proposals and ERDF funding application.	2003	SWRDA
Blyth Estuary Study: assessment of operations and business opportunities leading to the development of viable port development options as part of a wider regeneration-led masterplan study of the Blyth Estuary.	2003	One North East
The European Low Cost Airline Industry to 2007 and the Strategic Impact on the UK Ferry Market	2003	Passenger Shipping Association
Case for short sea container terminal at Hull	2003	Associated British Ports
Economic need and rail access for the Dibden Bay container terminal	1995-2002	Associated British Ports

SUBJECT OF STUDY	DATES	CLIENT
Mersey Superport economic study.	2009	Mersey Partnership
Assessing the long term potential of the Ports of Fowey and Par	2009	Cornwall County Council
Forecasts for Southampton Masterplan	2009	Associated British Ports
Commercial due diligence on target port acquisition.	2009	Private client (Infrastructure fund)
'Project Cowes' – Development Framework for the Regeneration of Cowes and the Medina Valley: appraisal of commercial port markets and development options, analysis of car and passenger ferry traffic to Cowes and the Isle of Wight and options for the future development of the ferry terminal.	2002	(Isle of Wight Economic partnership/IoW Council/SEEDA)
GB Port Infrastructure Supply & Demand for unit load traffic	2002	RSPB & English Nature
Investment strategy for developing a RoRo terminal at Killingholme on the Humber	2002	Simon Ports
Intermodal rail Links between South Yorkshire & the Humber Ports	2002	Yorkshire Forward
Cross Channel Market Study	2002	Private client
Port of Tyne: Study of Rail Potential	2002	Port of Tyne
Workington Port Best Value Review: identified a 10-year investment strategy for the future development of the Port, including the appraisal of market opportunities, SWOT analysis, funding issues and port management/ownership options and hinterland road/rail connections.	2001	Cumbria County Council
Assessed future market opportunities for cargo on the Manchester Ship Canal and considered the wider strategic opportunities which may be available in terms of freight distribution and related development in the North West England region.	2001	Manchester Ship Canal
Plymouth marine sector strategy: Development of a strategy incorporating the long term development potential and infrastructure requirements of port operating companies at the Port of Plymouth and of maritime related businesses (ship repair, boat building, marine technologies, fishing, tourism and leisure). Undertaken in association with DTZ Pieda consulting.	2001	SWRDA
Twelve Quays Ro-Ro Development: Traffic Forecasts & Investment Appraisal	2001	NWDA

Personnel

Brief CVs of the MDS Transmodal staff specialising in port projects are given below. Other support staffs from the company, along with data specialists, are also employed on specific projects.

Mike Garratt

Mike Garratt has a first degree in economics and a Masters degree in Transport Design. He worked initially as a local government transport planner, and subsequently as a researcher and then lecturer at the Universities of Leicester and Liverpool. He then founded the transport consultancy MDS Transmodal, which has now been trading since 1983. He specialises in shortsea shipping, ports and railfreight. Mike has conducted numerous studies for government, local authorities and the private sector. In the UK, he is a board member of both the Rail Freight Group and the water freight industry forum Sea & Water. Mike has been and continues to be involved with freight forecasting for amongst others: Department for Transport, Railtrack, the ORR and Network Rail. Mike Garratt is regarded as one of the most informed observers of the rail, shipping and ports industries in the UK and is regularly called upon to speak at conferences and private seminars.

Sharon Cox

Sharon Cox, one of the co-founders and a Director of MDS Transmodal, following a degree in Geography and a research post at the University of Liverpool, has spent the whole of her working life in research and consultancy. Sharon has been involved with many, varied projects over the past two decades but concentrates mainly on ports and domestic freight. Recently she has been heavily involved in consultancy related to financial transactions.

Meda Frost

Meda Frost is a director of MDS Transmodal. Her main area of interest and responsibility lies in the development and compilation of data and production of publications relating to liner shipping. The core product is the **Containership Databank**, which has been produced quarterly since 1985, and now monthly. This database contains operational (route, carrier, service, port rotation) and physical details of over 9000 container carrying vessels of over 100 TEU capacity both currently commissioned and on order. The Databank is supplied to a significant number of the major players in the container shipping arena, and is used extensively within MDS Transmodal for consultancy purposes. The Databank forms the basis for the **Containership Capacity Forecast**, produced quarterly, which provides a three year forecast, by quarter, of capacity deployed on the major east-west routes, by carrier/alliance and service string.

Gail Bradford

Gail Bradford has more than 20 years professional experience in maritime transport consultancy. She worked previously for a leading UK firm of consulting engineers before joining MDST in 2000. Gail specialises in shipping market research and analysis, port traffic forecasting and the appraisal of port development projects. She has also contributed to a number of EU maritime policy research projects for the European Commission covering European coastal shipping, seafarer employment and state aid to shipbuilding as well as studies covering Chinese and ASEAN liner shipping sectors.

Gail has extensive overseas port experience having worked on port development and masterplanning projects in SE Asia, China, the Pacific, Middle East, Europe and North America.

Simon Marzetti

Simon Marzetti has over 20 years professional experience across all modes in the transport industry both in engineering and computer modelling. He is MDS Transmodal's principal data analyst and currently is responsible for the development of international transport modelling. This includes responsibility for route cost modelling for container shipping lines, using MDST's LINCOST model. Simon has over 5 years overseas experience working in Mozambique, initially as a road engineer then as a freelance data analyst for several international organisations.

Chris Rowland

Chris Rowland is a Senior Consultant with MDS Transmodal and is a Member of the Chartered Institute of Logistics and Transport. He started his career at the National Audit Office, working in the transport and environment area, before spending six months working in Brussels for Directorate-General VII of the European Commission. Since joining MDS Transmodal in 1996 he has concentrated on the project management of often complex public sector projects, involving multi-modal freight transport issues, and has developed expertise in the market analysis of the rail freight, port and shipping sectors. Chris was the project manager of the UK Department for Transport study to produce national port demand forecasts to 2030. The forecasts have been used to inform the consultation process on the future UK port policy.

Philip Sutcliffe

Philip Sutcliffe is a highly successful consultant and manager. He has worldwide experience in management consultancy, specialising in the ports, shipping and rail sectors, with a particular interest in port development and software solutions in the world transport industry. In the last 20 years he has been involved in over 50 major consultancy projects ranging from port developments in Panama, to setting up transportation MSc courses in Moscow. In addition he has been the author of eight industry reports, mostly focusing on the container sector. He has provided key market advice and recommendations to clients that resulted in many successful ventures. For example, the purchase of the Baltic Container Terminal at Gdynia by ICTSI, the development of Port Said Eastport for the Egyptian government and the creation of a new statistical collection systems for maritime statistics in the UK.