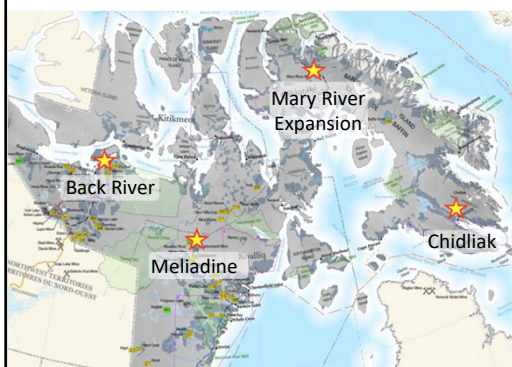






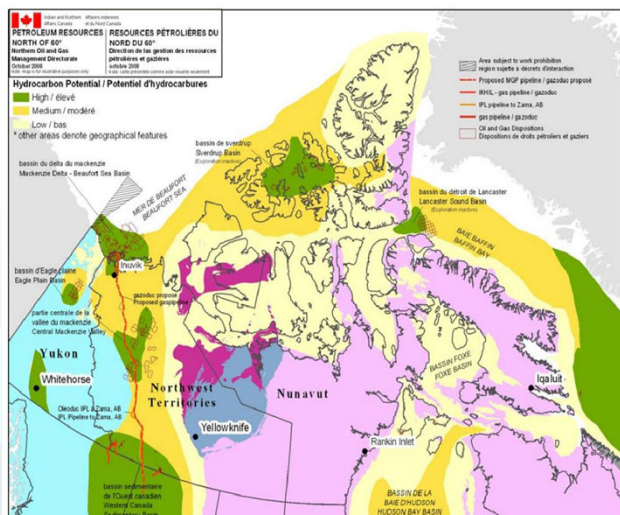
## Future Opportunity



- Significant exploration activity continues to exist
- At least three mines are currently in various stages of development
- Each mine site in development has different marine shipping needs



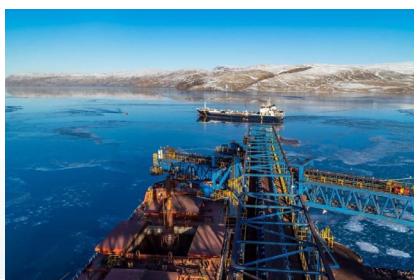
## Potential Resource Development - Oil and Gas



- Majority of Nunavut's petroleum resources are located offshore:
  - 70% of oil
  - 60% of gas
- With no existing roads or pipelines, shipping would be a necessity



## The Need for Shipping



*Mary River Iron Ore Mine*



*Back River Gold Mine*



## Other Resource Development



*MV Inuksuk 1 Trawler*

- Nunavut's fisheries sector is growing
- Access and allocations to fishing areas is increasing
- Inuit-owned offshore allocation holders have expanded their fleets





## Community Reliance on the Marine Environment



*Pangnirtung Small Craft Harbour*

- Nunavut's waters are vitally important to Inuit
  - Culture
  - Food Security
  - Transportation
- Currently only one small craft harbour in the territory
- Construction underway in Iqaluit and Pond Inlet



## Shipping Needs, Illustrated - Infrastructure



*Clyde River 'Marine Infrastructure'*

- Communities are in dire need of marine infrastructure
- The lack of marine infrastructure presents numerous safety concerns
- Deficits in sealift and fuel resupply infrastructure have been repeatedly flagged by industry



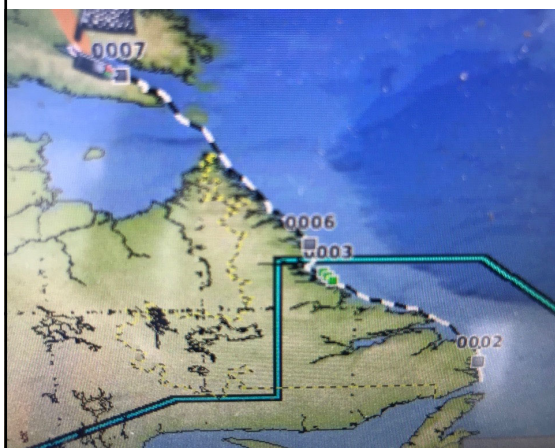
## Shipping Needs, Illustrated - Icebreaking

- Sea ice conditions are becoming increasingly unpredictable
- Reliable icebreaking is crucial for shipping activity in Nunavut

**2018 clearly demonstrated the need for icebreaking services**



## Shipping Needs, Illustrated - Charting



Charting of Nunavut waters is inadequate

Variability of sea ice often forces vessels to stray from better-known shipping lanes

**2018 clearly demonstrated the need for improved charting**

## Shipping Needs, Illustrated - Governance

- The current governance model for the waters of the Canadian Arctic must be improved
- Inuit voices must be heard
- Effective governance models exist and should be studied



*Members of Alaska's Arctic Waterways Safety Committee*

## Other Considerations

- Marine Protected Areas
- Tourism
- Research
- Sovereignty
- Security
- Transiting

