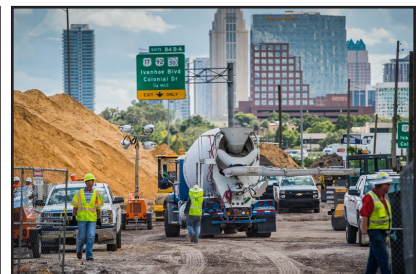
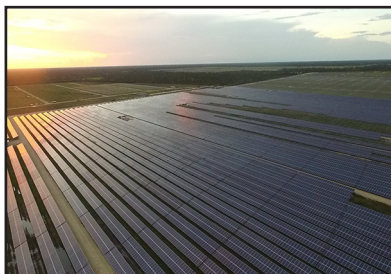


2018 INFRASTRUCTURE COALITION REPORT

A Florida Chamber Infrastructure Coalition
Report on Accelerating Florida Forward



FLORIDA
CHAMBER
of Commerce

SECURING FLORIDA'S FUTURE
www.FloridaChamber.com

ACCELERATING FLORIDA FORWARD

“As we look toward the future of infrastructure in Florida, we must dream big. Tourism is up, Florida’s population continues to grow, and now, we must match it with innovations in every mode of infrastructure to move people and goods more efficiently.”

ANANTH PRASAD
President,
Florida Transportation
Builders’ Association



Ananth Prasad
Chair, Florida Chamber’s
Infrastructure Coalition

President-Designate,
Florida Transportation
Builders Association

The Florida Chamber’s Infrastructure Coalition is focused on creating long-term investments in Florida’s energy, water, transportation, telecommunications, and rural infrastructure. With Washington, D.C.’s renewed focus on infrastructure, the Florida Chamber’s Infrastructure Coalition aims to maximize Florida’s economic growth opportunities. And at the state level, double down on efforts to prepare for Florida’s growing population through infrastructure investments.

ACKNOWLEDGEMENTS

Three work groups were created to develop the coalition goals and strategies.



Download the Florida Chamber’s Infrastructure
Coalition Recommendations at
[www.FloridaChamber.com/
InfrastructureRecommendations](http://www.FloridaChamber.com/InfrastructureRecommendations)



MOBILITY
Beth Kigel, Chair

CEO, Palm Beach
North Chamber
of Commerce

Florida Transportation
Commissioner



**ECONOMIC
PROSPERITY**
Malcolm Eve, Chair

Public Affairs
Manager - Southeast
Region, Crown Castle



COMMERCE
Rob Palmer, Chair

Planning Group
Leader, RS&H, Inc.

Chair, Florida
Chamber Trade &
Logistics Institute

MOBILITY

Opportunities for better integration - leveraging innovation and technology for infrastructure development which improves accessibility.

- ▶ Smart Cities/Regions and leveraging of Big Data
- ▶ Roadways and passenger rail
- ▶ Ridesharing transportation network companies (TNC), or mobility service providers (MSP)

OBJECTIVE:

Provide all Floridians and visitors with quality choices of where to live, work, raise a family, learn, and play.

ECONOMIC PROSPERITY

Advancing the development of rural infrastructure and future corridors that are cross-sector focused - addressing energy, digital and connectivity gaps.

- ▶ Rural development
- ▶ Cross-sector infrastructure
- ▶ Future Corridors

OBJECTIVE:

Provide high levels of connectivity options both within and between Florida's regions to advance economic development.

COMMERCE

Advancing strategic infrastructure investments that support and expand global competitiveness and position Florida as the hub for trade and logistics serving our state, the Southeast, and the nation.

OBJECTIVE:

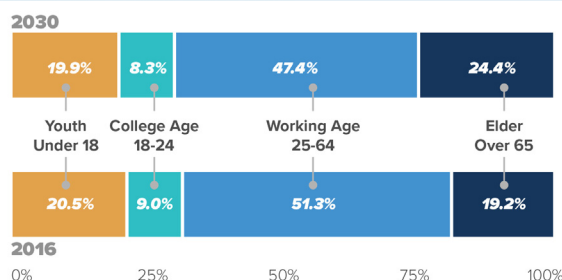
Position Florida's transportation assets in highways, airports, seaports, transit and spaceports to accommodate growth in demand for trade, residents and visitors. Ensure Florida's success as a global hub for trade.

"Florida is a \$1 trillion economy. It's important that we continue to focus on strategic, innovative and transformative infrastructure investments that will allow Florida to continue to compete and succeed on a global scale. By working together with the business community and the Florida Chamber's Infrastructure Coalition, we can ensure a prosperous future for Florida."

SENATE PRESIDENT
BILL GALVANO

FLORIDA POPULATION BY AGE GROUP

Source: University of Florida,
Bureau of Economic and
Business Research



Not Only Will Our Population Continue to Grow, It Will Also Be More Diverse

Aging Baby Boomers should continue to swell Florida's elder population. At the same time, the Millennial and GenX generations are growing as a share of Florida's total population. Our infrastructure needs to support growing demand as well as a wide range of options – from transit to autonomous vehicles.

Florida's long range transportation planning will need to consider solutions like, vehicle miles traveled (VMT), road user fees and/or electric vehicle fees in order for the state to be at the forefront of addressing key issues — like funding shortfalls as fuel efficiencies continue to improve, and electric vehicles and other technologies for moving residents, visitors and goods.

STATES THAT HAVE CONDUCTED VMT OR ROAD USER FEE STUDIES/PILOT

DELAWARE

CALIFORNIA

OREGON

WASHINGTON

COLORADO

FOUR BIG GOALS

1. Invest the Future:

Infrastructure is a long-term investment. Focus needs to be on investing versus spending. Investing considers maximizing lifetime benefits and total economic return. Florida needs to proactively seek opportunities to maximize and leverage available revenue sources between the public and private sectors, across modes, and agencies and jurisdictions for strategic infrastructure development.

- ▶ Need to maximize dollars — 'dig once,' and seek to have cross-sector infrastructure efficiencies wherever possible. Synchronize schedules to ensure that when a roadway is impacted for broadband for example, it is not dug up several months later for a water/sewer line. Explore mechanisms to provide funding for inter-agency coordination for work, which will reduce costs down the line.
- ▶ Recognize and prepare for the declining role of the Federal Highway Trust Fund and motor fuel taxes; position Florida as a leader in the discussion on this issue with private sector engagement.

Florida has benefited from a growing economy and strong infrastructure budgets. Florida's Department of Transportation budget is less reliant on federal funding than most other states, reflecting prior decisions to index state fuel taxes to inflation, expand the use of tolling and managed lanes, and develop public/private partnerships. However, Florida's long-range transportation planning will need to consider solutions like vehicle miles traveled (VMT), road user fees and/or electric vehicle fees in order for Florida to be at the forefront of addressing funding shortfalls as fuel efficiencies continue to improve, and as we move to electric vehicles and other technologies for moving residents, visitors and goods.

The federal Highway Trust Fund (FHTF) is again facing challenges. The Congressional Budget Office estimates that it will go insolvent, yet again, as soon as the fall of 2020 and will see a cumulative shortfall of more than \$160 billion by the fall of 2028. Funding is not directly correlated to usage.

- ▶ Build on what works. Florida is a recognized national leader in Public Private Partnership (P3) project development and has a successful track record in project delivery and in developing, implementing funding, and innovative financing mechanisms such as indexing fuel tax, tolling/managed lanes and varied private sector partnerships.
 - Continue to develop public-private partnerships to invest in future infrastructure.
 - Continue to encourage a diverse mix of transportation revenue sources, including market-based choices.

- ▶ Explore standardization wherever possible to speed up project delivery. Many counties/municipalities have their own procurement practices which can drive up costs for the private sector as they must navigate the maze for each different set of rules. This also discourages regional collaboration on project development and applies to various agencies as well. Finding areas of standardization, predictability and consistency can improve procurement and maximize investment opportunities.

2. Go Bold:

Support and work to ensure that Florida remains an attractive destination for private capital. Encourage and actively target private-sector companies involved in research, development, manufacturing, and service activities for transportation, energy, water and telecom equipment and technology as well as private funds to locate and invest in Florida's infrastructure future.

- ▶ Coordinate long-term, strategic, transformational intermodal/multimodal/multipurpose investments - with an eye to future corridors - to support development of statewide and regional logistics, manufacturing, and innovation ecosystems which will create economic opportunity for millions of Floridians.
- ▶ Ensure that Florida is at the forefront of global competitiveness. Engage and collaborate with companies at the cutting-edge of delivering innovative Internet of Things (IOT) platforms which create opportunities and solutions to improve mobility and address infrastructure gaps.

3. Catalyze Workforce Innovation:

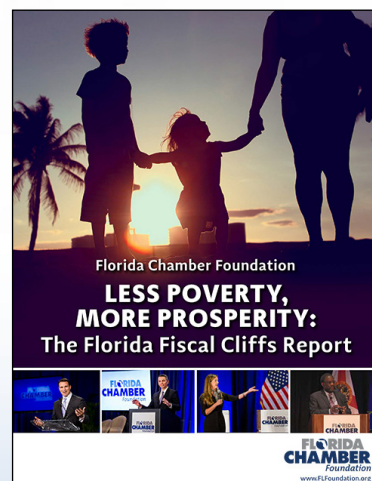
There is a need to better integrate technology and training into these emerging job trends which should be viewed at the local, state and regional levels as a true business approach. Looking at our future workforce needs with a technology, and IOT lens is important for Florida to be at the forefront to ensure our workforce is competitive and addresses the needs of future growth and trends.

Compounded by less than four percent unemployment, and increasing skills gaps - workforce shortages in transportation and construction industries are increasing, which adds to the costs of a project. Construction based workforce demands continue to increase as infrastructure and growth are on a tremendous growth curve.

- ▶ Attract and retain the next generation of talent. Develop workforce innovation strategies to build awareness and interest in the transportation and infrastructure sector. Promote the broad range of opportunities that exist now and into the future.

"Increasing connectivity, from transportation to access to internet, could be one key to furthering rural economic development efforts and could help diversify Florida's workforce."

FLORIDA CHAMBER
FOUNDATION'S LESS
POVERTY, THROUGH MORE
PROSPERITY REPORT



Download the Florida Chamber Foundation's
Less Poverty, More Prosperity Report at
[www.FloridaChamber.com/
ProsperityReport](http://www.FloridaChamber.com/ProsperityReport)

STRATEGY

Establish a Public Private Partnership (P3) clearing house to identify opportunities for private investment as well as provide examples of best-practices/successful projects in Florida. Work with local and state governments to identify investments opportunities.

- ▶ Build workforce skills to encourage innovation and support of adoption of new technologies that improve safety and mobility or increase the efficiency and reduce the cost of project delivery.
- ▶ Deepen and expand cross-sector collaboration and develop a strategy in concert with the private sector, CareerSource, FDOT and other agencies that builds on best practices and emerging workforce challenges.

4. Address Connectivity Gaps:

Insufficient connectivity to networks, both in terms of coverage and quality, can limit a region's ability to remain competitive. Florida needs to address shortages of essential infrastructure such as telecom, energy, water and transportation which can be a significant obstacle for economic growth, particularly in rural areas.

- ▶ Focus on Smart and Strategic "Connectivity" solutions as a cost saving and investment opportunity to expand and improve access to and from all of Florida's zip codes. The best connectivity solution is not always a new road. Alternatives should be considered, such as improved broadband infrastructure which could have a higher return on investment over the long-term. Solutions to address gaps should have an eye to technology and how people are "connecting" to employment and opportunities now and into the future.

STRATEGIES

RECOMMENDED BY WORK GROUPS

MOBILITY WORK GROUP

- ▶ **Strategy:** Provide high levels of passenger connectivity options (including bus rapid transit, commuter/high-speed rail, transportation network companies, and other shared-transport services) both within and between Florida's regions, including rural to urban connections.
- ▶ **Strategy:** Support the growing demand for a wide range of mobility options as well as advanced intermodal transportation – from walking and bicycling to transit and shared vehicles/services.

EXAMPLES OF P3 OFFICES



- ▶ **Strategy:** Continue to be a leader in research and deployment of emerging transportation technologies including autonomous, connected, shared, and electric vehicles.
- ▶ **Strategy:** Use emerging technologies to reduce delay and improve reliability and customer service, such as: intelligent transportation systems; automated, connected, or shared vehicles; origin to destination trip planning for all users; and a universal, user friendly payment system that works across transportation modes and jurisdictional boundaries.
- ▶ **Strategy:** Improve connectivity of data, technology, and business processes between transportation modes and systems.
- ▶ **Strategy:** Improve performance measures by reviewing and recalibrating to ensure that as a state we are not leaving gaps. Promote better utilization of data by local and state governments. Look to the private sector for appropriate solutions.

ECONOMIC PROSPERITY WORK GROUP

Gaps in rural infrastructure should be seen as gaps in Florida's infrastructure system. These gaps impede the movement of people, goods, ideas, data and overall resources across the state.

- ▶ **Strategy:** Expand the options for connectivity between existing and emerging economic centers. Continue to incorporate economic development benefits into infrastructure investment decision making processes.
- ▶ **Strategy:** Continue to support legislation to increase investment for Rural Areas of Opportunity. Raise awareness and transparency to existing tools and funding programs available to communities from state and federal sources to address connectivity gaps. With five million more people expected to call Florida home by 2030, policies promoting job creation in rural communities to help increase economic growth throughout Florida.
- ▶ **Strategy:** Encourage communities and regions to participate in long-range visioning activities that link economic development, land use, infrastructure, community planning, and environmental stewardship decisions.

"With 26 million people expected to call Florida home by 2030, a growing Florida means a growing need for infrastructure to support our increasing population and increasing visitors."

MARK WILSON
President and CEO
Florida Chamber of Commerce

PREPARING FLORIDA'S INFRASTRUCTURE FOR SMART GROWTH AND DEVELOPMENT

Diverse, attainable housing
to meet future demand

Every resident has access
to **public and private**
mobility services

All major population and
economic centers connected
to regional, national, and
global markets by
high-capacity corridors

World's **most capable**
spaceport, top-tier airports,
seaports and surface
transportation hubs in U.S.

100% of Florida's residents
have access to **high-speed**
communication connectivity

Diverse and reliable
energy, water, and waste
management resources to
meet future demand

All Florida residents
protected by **resiliency plans**

- ▶ **Strategy:** Transform Florida's major transportation corridors to accommodate multiple modes of transportation and multiple types of infrastructure.
 - Encourage early identification of future corridors to better support and attract transportation intensive activities and investments. Strategic infrastructure projects should be designed to be multimodal/multipurpose so that the overall footprint is reduced and investment is maximized.
 - Support development of manufacturing and logistics clusters along inland corridors such as I-10 and U.S. 27 corridors.
- ▶ **Strategy:** There is an opportunity to further "unleash private investment" through collaborative project delivery. By encouraging communities and regions to collaborate and partner on projects particularly for smaller and/or rural projects - which would not be attractive to the private sector on their own - with larger projects would increase the potential of a project coming to fruition.
- ▶ Establish a Public Private Partnership (P3) clearing house to identify opportunities for private investment as well as provide examples of best-practices/successful projects in Florida. Work with local and state governments to identify investments opportunities.
- ▶ Allow greater input by the private sector in project development/delivery rather than merely delivering projects within plans.

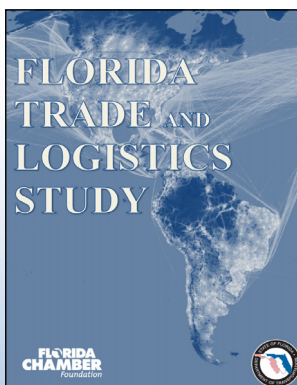
COMMERCE WORK GROUP

- ▶ **Strategy:** Position Florida for the next wave of growth in global commerce to include: emerging markets; travel and tourism; digital trade; health; education and related services. Position Florida's airports, seaports, and spaceports to accommodate growth in demand for trade and visitors.
 - Increase the efficiency and capacity of Florida's major airports, seaports, spaceports, and other freight and passenger terminals through strategic investments in new capacity and enhanced operations.
 - Improve and expand the links between Florida's trade and visitor gateways and inland corridors to enable efficient global supply chains and delivery networks to, from and within Florida.

- Improve terminal infrastructure and expand connectivity to other modes to make Florida's airports and seaports more attractive for investment, including opportunities for more direct international (especially developing additional direct air service with Asia) and domestic flights, ferry service and coastal shipping, home port and port-of-call cruise activity, and first-call import and last-call export ocean carrier service.
 - Increase the efficiency, capacity, and connectivity of major truck, rail, and water corridors through targeted capacity improvements, accommodations for heavy freight movement, and separation of freight and passenger traffic on shared corridors.
- **Strategy:** Enhance economic competitiveness by ensuring a competitive operative environment for freight transportation.
- Address freight/goods movement challenges such as roadway improvements, 24-hour delivery services and last-mile connectivity for Florida's major airports, seaports, spaceports and other freight and passenger terminals for all modes.
 - Support a modernized state freight transportation system which includes adequate supply and location of needed truck parking as well as appropriate use of connected vehicles and driverless vehicle technologies to help optimize goods movement.
 - Increase visibility and incorporate into the systems planning/implementation, the challenges, conflicts and opportunities that e-commerce presents to our transportation networks.
- **Strategy:** Private and public sectors need to work in tandem to address workforce shortages to meet the demands of future infrastructure investment/construction, freight/goods movement, and emerging technologies for transportation.

Florida is Made for Trade

Download the Florida Chamber's Trade & Logistics Studies to learn why Florida is the global hub for trade.



SECURE FLORIDA'S ROLE AS A GLOBAL HUB

We must continue to expand Florida's role as a global hub for trade, logistics, visitors, talent, and investment. We also must position Florida for the next wave of growth in global commerce: emerging markets; advanced manufacturing products; travel and tourism; health, education, digital trade and other services. Florida needs to continue to make strategic investments to improve access to inland and international markets.

VEHICLE MILES TRAVELED

214.64
Billion (Improving)

CONTAINERS (TEUS)

3.65
Million (Improving)

SEAPORTS CARGO

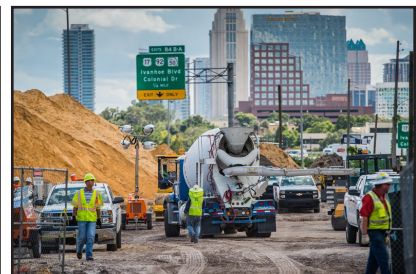
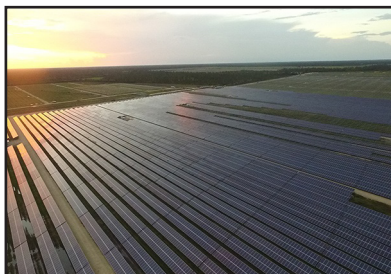
\$83.2
Billion (Improving)

TRUCK CROSSINGS

15.0
Million (Improving)

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FOR MORE INFORMATION, PLEASE CONTACT:

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www.FloridaChamber.com/InfrastructureRecommendations

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