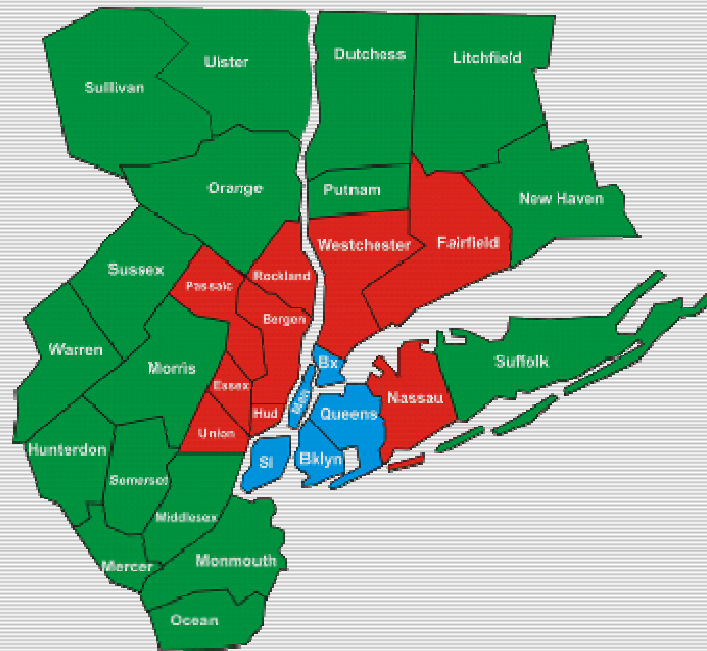


Regional Strategic Review *Update*



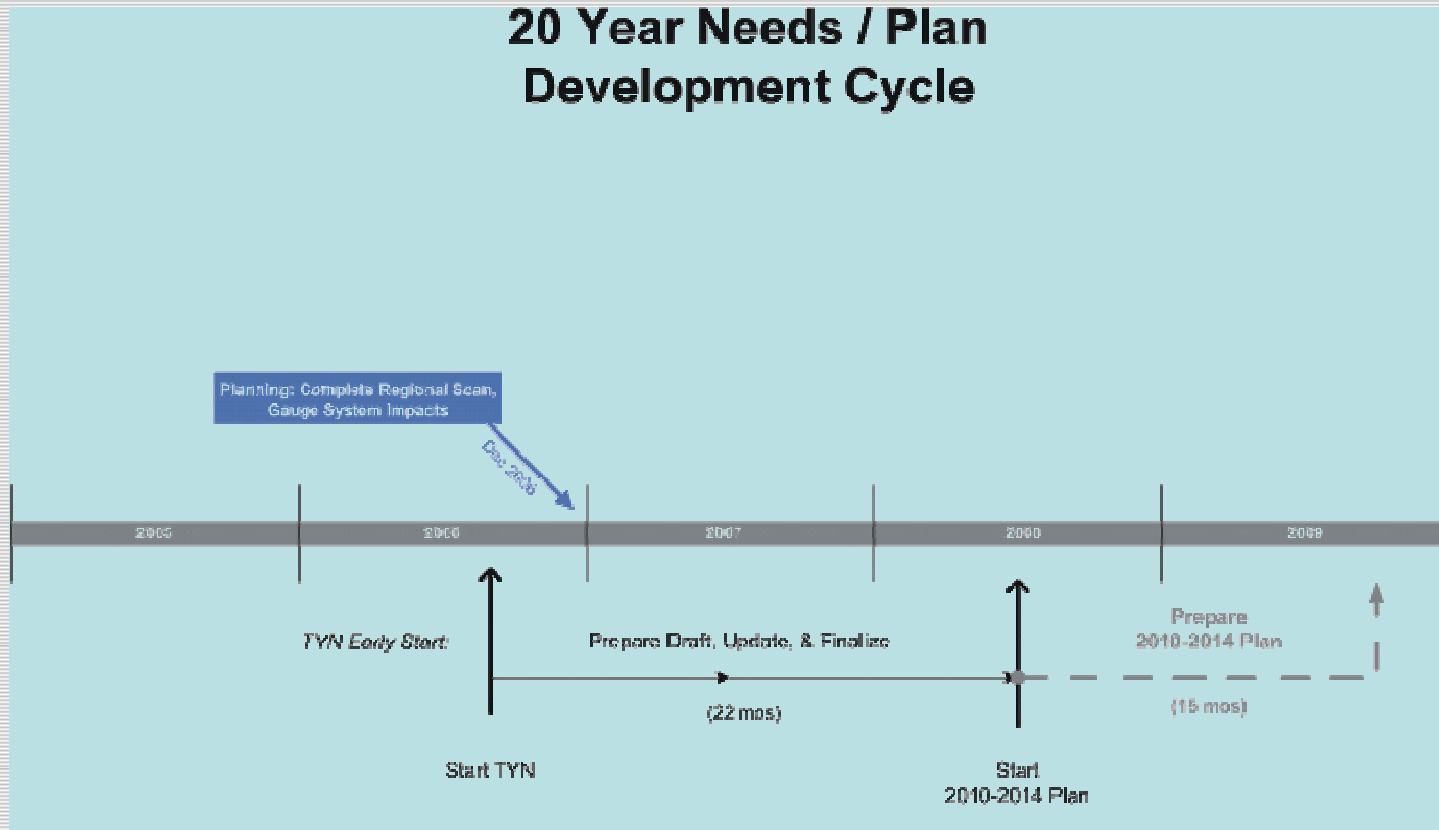
October 23, 2006

Purpose of Presentation

- Update Board on progress of MTA's Regional Strategic Review
- A scan of the counties served by the MTA
 - County Executives
 - Planning and transportation commissioners
 - Economists, others

Goal of Regional Strategic Review

- To supplement the next 20 Year Needs Assessment



Topics

- Where is the region heading?
- How are NYC and the suburban counties planning for the growth?
- Next steps

Where is the Region Heading?

- Conclusions of previous presentation:

- A broad consensus on growth

- Population and jobs will continue to grow
 - The population will continue to age
 - Immigration will continue to fuel growth



Where is the Region Heading?

- Conclusions of previous presentation:
 - Past travel trends will continue and intensify
 - Travel to the Manhattan CBD
 - Intra-borough travel
 - Reverse commutation
 - Intra-suburban travel
 - Longer suburban to city trips
 - More off-peak trips—travel peaks are spreading



How are NYC and the Suburban Counties Planning for this Growth?

■ Overview

- Growth trends support and confirm the need for network expansion projects
- Growth will challenge MTA's network, services and finances
- Strategic Issues: context for capital and operating budgets

How are NYC and the Suburban Counties Planning for this Growth?

■ New York City

• Overview

- Commercial and residential redevelopment in areas that have lagged in growth since the 1970's. Examples include:
 - Brooklyn: Williamsburgh, Brownsville, Bedford Stuyvesant, East NY, Southern Brooklyn
 - Bronx: South Bronx
 - Queens: Long Island City, Astoria, Rockaways
 - Manhattan: West Midtown, Lower Manhattan, Harlem
 - S.I.: North Shore, South Shore
- New growth should be accompanied by additional infrastructure improvements (e.g., housing, education, transportation, other)

How are NYC and the Suburban Counties Planning for this Growth?

■ New York City

Forecast

Population:

2000: 8.01m

2030: 9.49m (18.5%)

Employment:

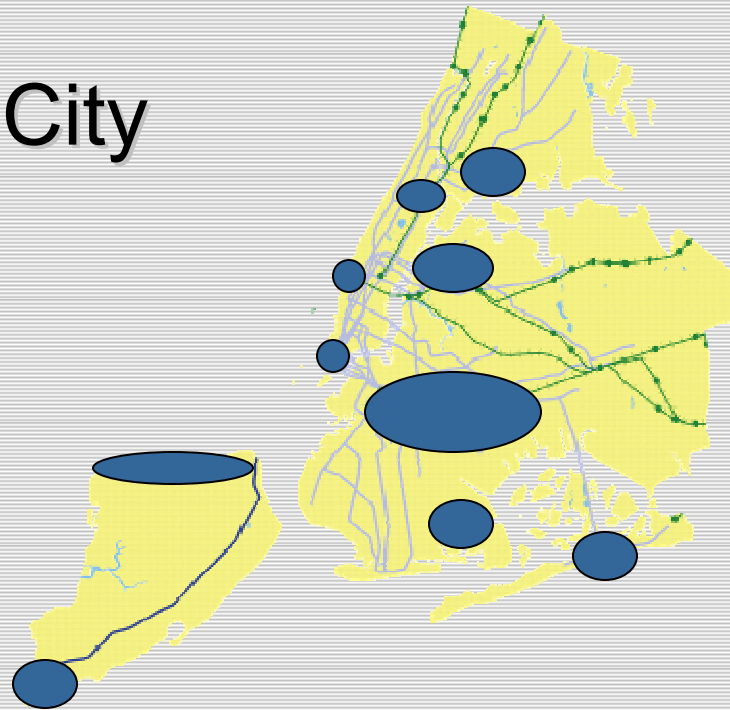
2000: 4.29m

2030: 5.24m (22.6%)

Labor Force:

2000: 3.7m

2030: 4.4m (19.8%)



Themes

Redevelopment of areas that have lagged in growth since the 1970's

Formal City initiative to plan for growth at neighborhood level

Examples of Potential Implications for MTA

Additional service on existing rail and bus lines

Track and depot constraints at some locations

Local station access implications from outer borough development

BRT opportunities—street management

How are NYC and the Suburban Counties Planning for this Growth?

■ Suburban Counties

• Overview

- Limitations on where growth can occur: topography, open space, watersheds, lack of supporting infrastructure, zoning restrictions, lack of undeveloped land
- Policies differ among counties: manage growth, limit growth
- Re-development opportunities: former commercial campuses, institutions, existing downtowns
- Growth is largely controlled by localities
- Station access and egress will be important issues

How are NYC and the Suburban Counties Planning for this Growth?

■ Nassau

Forecast

Population:

2000: 1.33m

2030: 1.44m (7.6%)

Employment:

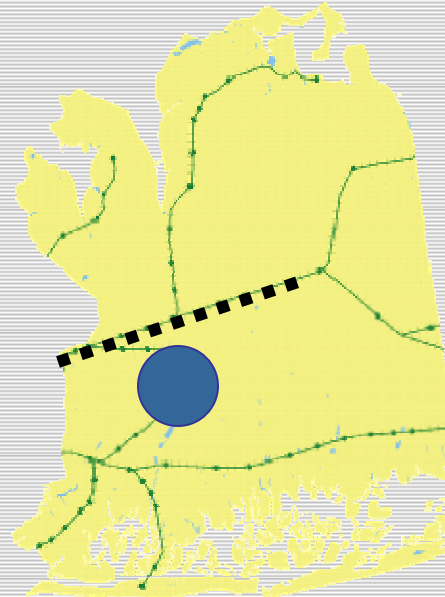
2000: 0.743m

2030: 0.829m (11.5%)

Labor Force:

2000: 0.687m

2030: 0.793m (15.4%)



Themes

Encourage growth in “Hub” area

Reduce growth of traffic congestion

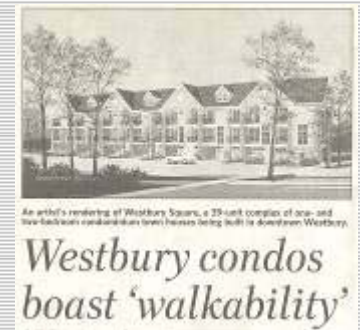
Emphasize downtowns

Examples of Potential Implications for MTA

Additional bus and rail connections for the “Hub”

Additional reverse peak service

Additional track capacity



How are NYC and the Suburban Counties Planning for this Growth?

■ Suffolk

Forecast

Population:

2000: 1.42m

2030: 1.78m (20.5%)

Employment:

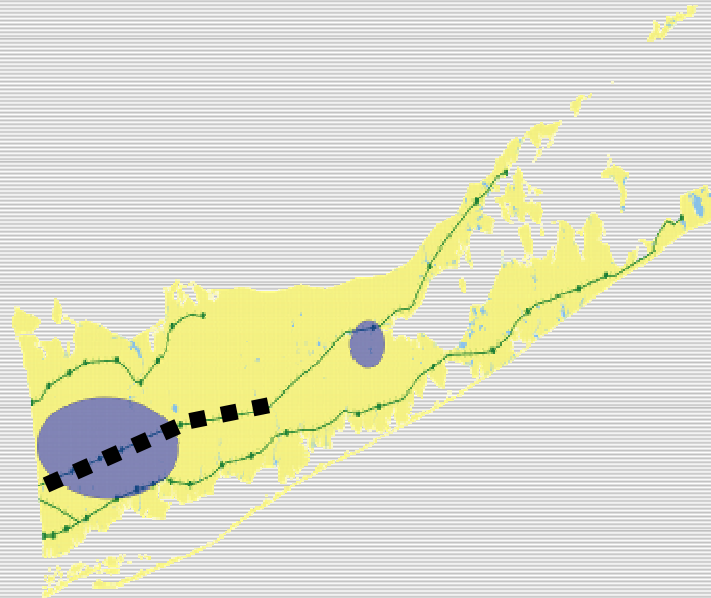
2000: 0.714m

2030: 0.983m (37.7%)

Labor Force:

2000: 0.720m

2030: 0.965m (34.1%)



Themes

Multi-centric development

*Commercial development
in western portion of
county*

*Population growth in
eastern portion of county*

Examples of Potential Implications for MTA

Additional track capacity

Additional reverse peak service

Additional yard capacity and associated electrification extensions

How are NYC and the Suburban Counties Planning for this Growth?

■ Westchester

Forecast

Population:

2000: 0.923m

2030: 1.01m (4.5%)

Employment:

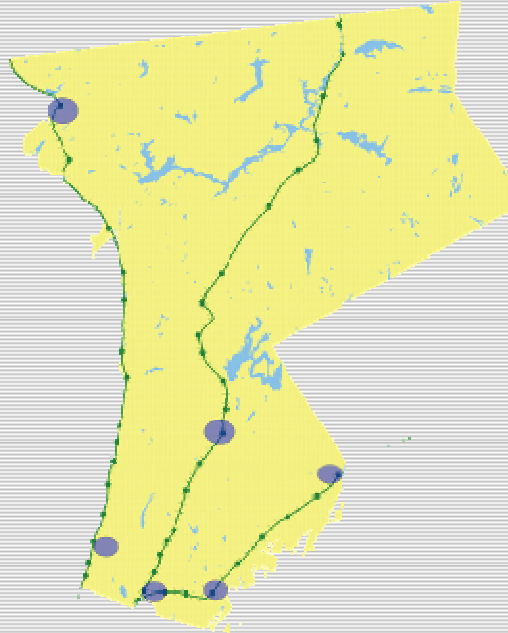
2000: 0.509m

2030: 0.619m (21.6%)

Labor Force:

2000: 446m

2030: 538m (20.7%)



Themes

Focus growth and redevelopment in White Plains & other cities

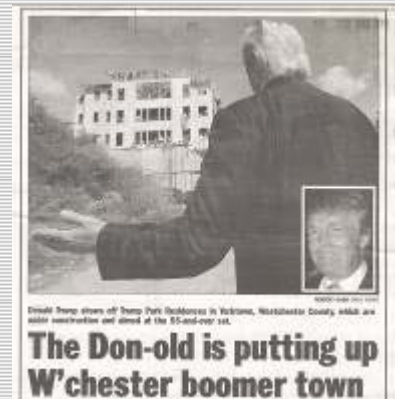
Manage commercial development and residential growth to preserve quality of life

Growth limitations: watershed and infrastructure capacity constraints

Examples of Potential Implications for MTA

Additional service on existing rail lines

Additional reverse peak service



How are NYC and the Suburban Counties Planning for this Growth?

■ Putnam

Forecast

Population:

2000: 0.096m

2030: 0.134m (31.8%)

Employment:

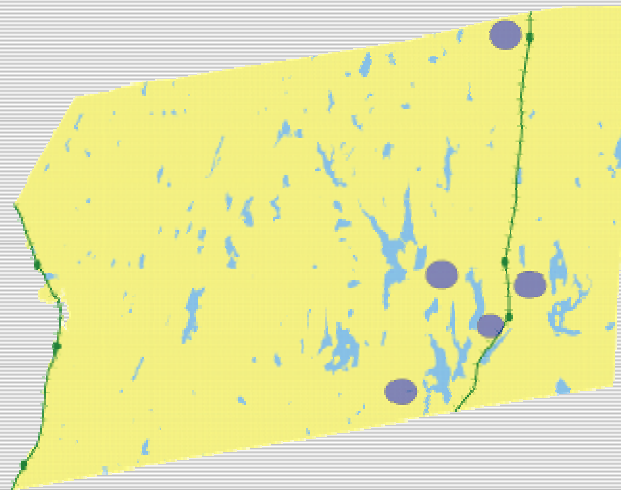
2000: 0.033m

2030: 0.048m (45.3%)

Labor Force:

2000: 0.053m

2030: 0.089m (66.8%)



Major Themes

Growth in southern and eastern portion of county

Growth limitations: development in 1/3 to 1/2 of county limited by topography, watershed, zoning and lack of infrastructure

Examples of Potential Implications for MTA

Additional service on existing rail lines

How are NYC and the Suburban Counties Planning for this Growth?

■ Dutchess

Forecast

Population:

2000: 0.280m

2030: 0.431m (43.8%)

Employment:

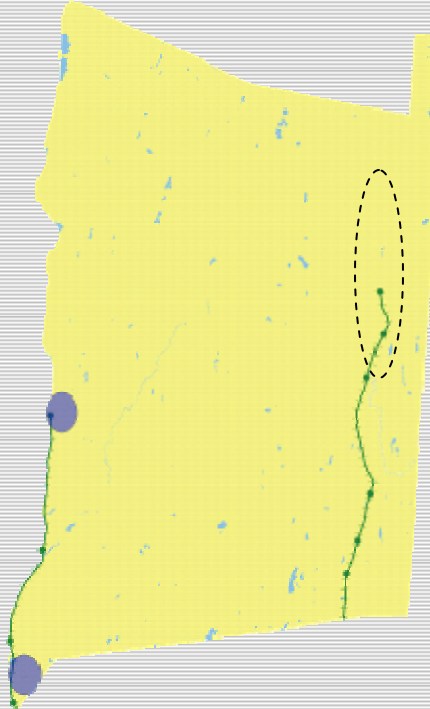
2000: 0.139m

2030: 0.198m (42.2%)

Labor Force:

2000: 0.120m

2030: 0.168m (40.3%)



Major Themes

Encourage growth in older downtowns & redevelop former commercial campuses and institutions

Growth mainly in southeastern portion of county; future growth projected in eastern & northern areas

Growth limitations: environmental and infrastructure constraints

Examples of Potential Implications for MTA

Additional service on existing rail lines & ferry connections

Service extension opportunities

How are NYC and the Suburban Counties Planning for this Growth?

■ Rockland

Forecast

Population:

2000: 0.287m

2030: 0.370m (23.9%)

Employment:

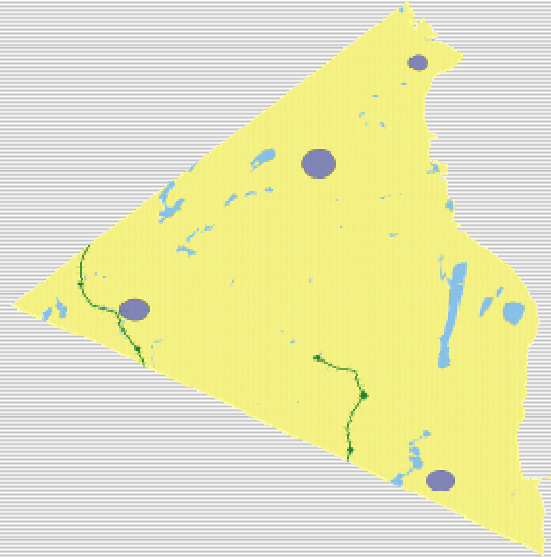
2000: 0.134m

2030: 0.176m (31.7%)

Labor Force:

2000: 0.144m

2030: 0.223m (54.6%)



Themes

Encourage development in former commercial campuses, institutions, existing downtowns

Growth limitations: roughly 1/3 of Rockland is State parkland

Examples of Potential Implications for MTA

Additional service on existing rail lines and bus & ferry connections

Potential opportunities: Tappan Zee corridor, Stewart Airport access

How are NYC and the Suburban Counties Planning for this Growth?

■ Orange

Forecast

Population:

2000: 0.341m

2030: 0.532m (41.7%)

Employment:

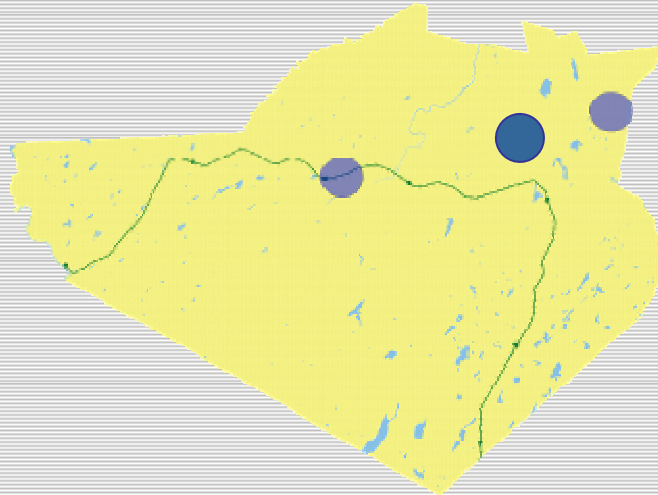
2000: 0.150m

2030: 0.219m (46.4%)

Labor Force:

2000: 0.155m

2030: 0.280m (80.5%)



Major Themes

Encourage growth in existing downtowns

Develop Stewart Airport

Growth limitations: up-zoning (exurban areas); lack of infrastructure

Examples of Potential Implications for MTA

Additional service on existing rail lines

Potential opportunities: Tappan Zee corridor, Stewart Airport access

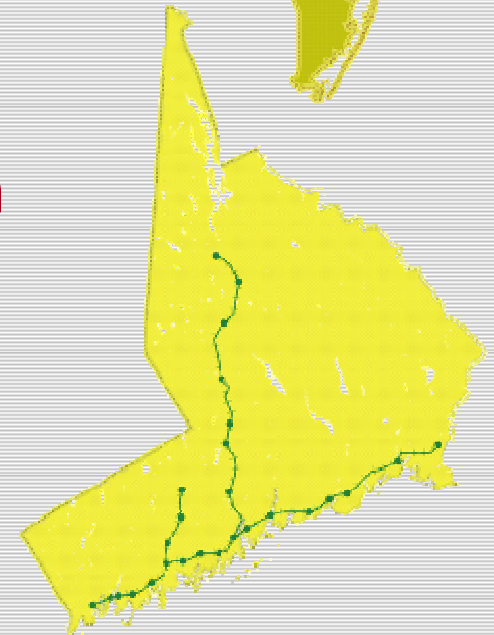
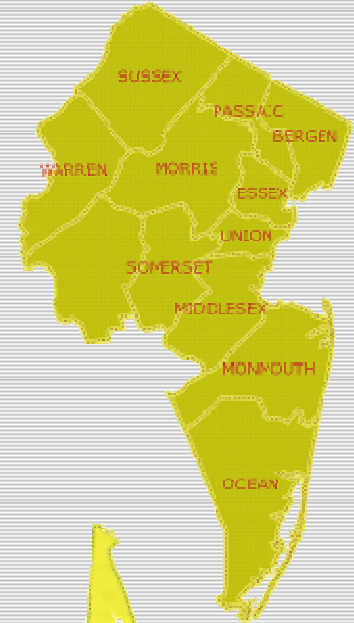
How are NYC and the Suburban Counties Planning for this Growth?

■ Northern New Jersey

- Increase capacity to Manhattan
- Extend commuter shed

■ Connecticut

- Foster growth in Stamford/Greenwich corridor
- Increase intra-CT rail service
- Integration with Shore Line East



Next Steps

- Evaluate risks and opportunities

- Regional scan: Nearing Completion
- Gauge potential impacts on MTA services: Late 2006

- Confirm existing plans/identify potential improvements as part of TYN early start: Early 2007
- Complete 20 Year Needs Assessment: Mid-2008
- Complete next 5 year Capital Plan: Mid-2009