FLL Passenger Growth
(110.1% growth in 10 years)

2020 Projection: 32 Million Passengers
## Florida Airports Growth Comparison 1995-2004

<table>
<thead>
<tr>
<th></th>
<th>1995</th>
<th>2004</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orlando</td>
<td>22.5</td>
<td>31.1</td>
<td>38.2%</td>
</tr>
<tr>
<td>Miami</td>
<td>33.2</td>
<td>30.2</td>
<td>(9.1)%</td>
</tr>
<tr>
<td><strong>Ft. Lauderdale</strong></td>
<td><strong>9.9</strong></td>
<td><strong>20.8</strong></td>
<td><strong>110.1%</strong></td>
</tr>
<tr>
<td>Tampa</td>
<td>11.4</td>
<td>17.4</td>
<td>27.0%</td>
</tr>
<tr>
<td>Palm Beach</td>
<td>5.1</td>
<td>6.5</td>
<td>27.4%</td>
</tr>
<tr>
<td>Ft. Myers</td>
<td>4.1</td>
<td>6.7</td>
<td>63.4%</td>
</tr>
<tr>
<td>Jacksonville</td>
<td>3.6</td>
<td>5.2</td>
<td>44.4%</td>
</tr>
</tbody>
</table>
FLL Operations Growth
(55.5% Growth in 16 years)
FLL Programmed Development

2. Design/Programmed (current) $ 459 M
3. Future $2,307 M

Total $3,461 M

1 – Hibiscus Garage, Terminal 1, Entrance Road, Terminal Renovations, Cypress/RCC, 9L Overlay
2 – Ped Bridges, Taxiway C, Concourse A, Cruise Bag Check, Exit Roads, Terminal 4 Phase I, In-line Bag Screen
3 – Terminal 4 Phase 2 and 3, South Runway Expansion, APM-FLL portion, Intermodal Center
Meeting FLL’s Growth Demands

FLL’s Foundation for Growth

- **EIS***  Airfield Expansion
- **Master Plan**  Facility / Gate Development
- **Part 150**  Mitigate Environmental Impact
- **GAI***  Environmental Initiatives

*Environmental Impact Statement
*Green Airport Initiative
Environmental Impact Statement

Status / Schedule
EIS Process: Where are we?

- Project Identification
- FAA Selects Consultant
- Prepare Draft Scope of Work
- Conduct Scoping Process
- Finalize Scope of Work
- Data Collection Identify Purpose & Need
- Screen/Refine Present Final Alternatives
- Develop Preliminary Range of Alternatives

- Notice Availability of DEIS & Public Hearing
- Conduct Public Hearing
- Agency/Public Circulation
- Respond to Agency/Public Comments
- Develop Mitigation/Prepare Final EIS

- Announcement of Final EIS
- FAA Signs/Issues Record of Decision
- Broward County Initiates Project

We Are Here
EIS Alternatives

A Wide Range of Alternatives to be Evaluated

- South Runway Options
- North Runway Options
- Combination Runway Options
- Crosswind Runway Options
- Use of Other Airports
- Use of Other Modes of Transportation
- Use of Other Technologies
- Use of Demand Management Strategies
Alternatives Evaluation

- **Capacity/Airfield Throughput**: How an alternative meets the need to accommodate future aviation demand (aircraft operations and passengers)

- **Capacity/Airfield Balance**: How an alternative balances the demand for airside, terminal, landside/curbside facilities

- **Runway Length**: How an alternative meets the need for a runway length to accommodate the future fleet mix

- **Maintenance of Operations**: How an alternative is capable of maintaining operations during construction

- **Constructability**: Can an alternative be constructed

- **Environmental**: How an alternative may impact the environment
What’s Next?

Current Tasks
- FAA develops purpose and need for the project
- FAA identifies and evaluates range of alternatives
- Agency consensus on purpose and need and alternatives

Upcoming Tasks
- Interim Public Workshop
- FAA assesses and discloses environmental impacts
- FAA identifies potential mitigation strategies
- Agency consensus on proposed mitigation
- FAA coordinates with environmental regulatory agencies
- FAA prepares and issues Draft EIS
- Public Hearing on Draft EIS
- FAA prepares and issues Final EIS
- FAA issues its finding in a Record of Decision (ROD)
- If approved, Broward County initiates Proposed Project
Green Airport Initiative

Status / Schedule
The Green Airport Initiative – FLL Process

- Step by step process for improving environmental quality at FLL and maximizing efficiency

- Focuses upon systematic implementation of innovative technology and operating practices

- Goal of GAI is to improve environmental quality and reduce operating costs through the implementation of voluntary measures that exceed compliance (in contrast to environmental impact statement that identifies mitigation strategies to insure future regulatory compliance)

- Goal is to help FLL create an environmental friendly and sustainable facility
What’s Next for GAI

- Draft Report to Board - 1st Quarter ‘06
- BOCC Approval of Accepted Strategies – 2nd Quarter ‘06
Part 150 Study

Status / Schedule
Part 150 Study

- Noise mitigation program funding is scheduled to be provided by the County’s Noise Mitigation Bank:
  - Initial funding with PFC revenues has approval from FAA, with spending authority approval to be secured in the future
  - Bank to be recapitalized with grants, future PFCs and other BCAD revenues

- Broward County’s Noise Study includes elements not included in a typical Part 150 study
  - Establish noise mitigation “Policy Principles”
  - Provide County-approved mitigation measures to the FAA’s EIS – To be incorporated into Record of Decision
  - Address noise-related obligations of the County’s development orders, Interlocal Agreements, and goals identified by the BOCC in its December 9, 2003 Motion
  - Policies and/or mitigation to reduce noise exposure in public parks
Potential Measures To Be Considered in the Study

- **Operational Noise Abatement Measures:**
  - Flight tracking in I-595 Corridor
  - Continuous Decent Approach Procedures
  - Enhance Runway Use Program
  - Nighttime Runway Use Program (such as over-the-water operations)
  - Noise barriers and berms

- **Noise Mitigation Measures:**
  - Fee simple acquisition
  - Sound Insulation
  - Avigation easements
  - Compensation for property devaluation
  - Regulatory land use measures such as zoning and building codes
  - Other innovative compensation, funding and housing measures developed for Broward County and/or applied through other airport programs
## Project Schedule and Outreach

<table>
<thead>
<tr>
<th>First Quarter 2006</th>
<th>Second Quarter 2006</th>
<th>Third Quarter 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory / database</td>
<td>Baseline 2004 and Future 2012 noise exposure</td>
<td>Specific noise mitigation measures</td>
</tr>
<tr>
<td>Noise mitigation measures</td>
<td>Noise abatement operational measures</td>
<td>County initiatives</td>
</tr>
<tr>
<td>EIS Mitigation</td>
<td></td>
<td>Documentation and submittals</td>
</tr>
</tbody>
</table>

- Elements for stakeholder and public involvement
  - Technical participation
  - Public participation workshops (x3)
  - Meetings with municipalities /associations
Airport Master Plan Update
Phase 1

Report Summary
Existing Conditions

Airport Profile

Passenger Terminal Complex
- 57 air carrier gates
- 11,500 structured parking stalls

Airfield Operations Area
- 9,000 North Runway 9L-27R
- 6,905 Crosswind Runway 13-31
- 5,276 South Runway

Activity in 2004
- 10.4 million enplanements
- 315,500 aircraft operations
Master Plan Update – Phase 1 Starting Point

- **Baseline Assumptions**
  - Proposed South Runway Extension
  - International Terminal 4 expansion through Phase 3
  - Concourse A
  - Exit Roadway Improvements
  - **Forecast Traffic**, per FAA’s Terminal Area Forecast for consistency with EIS

- **Other Factors Affecting the Baseline for the Master Plan Update**
  - Existing interlocal agreements and DRI approvals which followed the 1994 Master Plan Update
  - Other projects approved by the County, as reflected in the approved Airport Layout Plan including planned developments on the Sheltair leasehold
  - Compatibility with airfield alternatives being considered as part of the Proposed South Runway EIS process
Master Plan Update – Phase 1 Scope

- **Specific examinations included in the scope of work**
  - **Airfield Elements**
    - Whether or not to preserve the option of a North Parallel Runway
    - Decommissioning of the Crosswind Runway (Runway 13/31)
  - **Future Role of General Aviation at FLL**
    - Implications of reconsidering the role of General Aviation at FLL in the future
  - **Aviation Support Facilities**
    - Assessment of existing west side land use master plan

- **Other core facilities to be evaluated**
  - Number of airline gates and terminal complex configuration
  - Parking, roadway and access issues
  - Airport boundaries and land requirements
Background: Enplaned Passenger Growth at FLL

Source: Historical Data—Broward County Aviation Department. Forecast Data Federal Aviation Administration, *Terminal Area Forecast*, January 2005.
Background: Aircraft Operations Growth at FLL

Historical Average Annual Growth Rate 2.3%

Forecast Average Annual Growth Rate 2.4%

Source: Forecast Data Federal Aviation Administration, Terminal Area Forecast, January 2005.
Preserving for Future North Parallel Runway *

**Benefits of preserving the option**

- Reduce expected pressure to accelerate phase-out of proposed South Runway “use restrictions”
- Provide avenue for incremental airfield capacity to accommodate projected demand traffic levels post-2020
- Ensure consistency with current EIS, which is expected to include a version of a North Parallel as an alternative to the Proposed South Runway extension

**Drawbacks to preserving the option**

- Not all of the north side functions can be relocated on FLL within existing boundaries, although all north side functions may not be deemed essential in the future
- Affects business and leasing decisions until a determination is made about developing the project

**Findings** - Advisable to preserve the future option and limit term of lease agreements on the north-side at least until:

1. South Runway Extension EIS is completed and all alternatives are fairly assessed, and;
2. The South Runway Extension, if approved, and other terminal related facilities are completed as part of a near-term development program (described later)

* Task undertaken per December 9, 2003 Board Motion
Decommissioning Crosswind Runway 13/31 *

- **Capacity** - Benefits from runway are negligible after completion of South Runway extension, given reduced length and intersections with air carrier runways

- **Operational Factors** - Weather conditions and FLL fleet mix not sufficient factors justifying retention

- **Alternative Land Uses**
  - North-south cross-field taxiway system would provide greater benefits to airfield efficiency
  - Facility development opportunities in the airport core overwhelm the airfield benefits of retention

**Findings:**

1. Goal of decommissioning the runway may be more be achievable if adopted in conjunction with a policy that preserves the option for a North Parallel Runway

2. The County’s goal of decommissioning Runway 13/31 was forwarded to FAA for consideration as part of the Proposed South Runway EIS process. However, in the event that the runway is not decommissioned through the EIS, the County may have to pursue this goal through an alternate process.

* Task undertaken per December 9, 2003 Board Motion
Future Role of General Aviation at FLL *

- FLL’s share of South Florida G.A. traffic is relatively low
- FAA projection of FLL G.A. traffic out to 2020 does not surpass 1999 peak year
- Operating the extended South Runway per County’s runway use program provides residual capacity to accommodate forecast levels of G.A. traffic without constraining commercial operations
- Consolidating G.A. facilities on the west side would enhance airfield operations
- Current financial terms for G.A. operations at FLL are more favorable to aircraft operators than at other congested large-hub airports

**Findings:** Advisable to:

1. Set aside land area on west side for handling G.A. traffic at today’s airport-wide acreage
2. Establish a timetable for BCAD to implement fees for G.A. operators that reflect their share of airport costs/traffic

* Task undertaken per December 9, 2003 Board Motion
West Side Land Use *

- The existing west side land use plan was designed to accommodate the requirements of a single occupant (Amerijet)

- Replacing the Crosswind Runway adds about 20 acres of land area for development

- Overall, there would be about 130 acres available for development on the west side, net of the Sheltair leasehold

- The site provides the County with the flexibility to accommodate different combinations of airport uses.

Findings:

- A new west side site plan should be adopted to better accommodate potential relocation of functions from the north side

- Plan should be flexible for mixed uses as demand dictates development

* Task undertaken per December 9, 2003 Board Motion
Core Facility Development Plans

- **Two time horizons defined for Master Plan Update, Phase 1**

**Plan for the next 10 years - “Near-Term Plan”**

- Provides facilities to accommodate 10 year growth projection consistent with:
  - County preference to build the South Runway extension
  - The provisions of previously adopted interlocal agreements and the DRI
  - Balance between airfield capacity and terminal facilities

- Basic choices:
  - Develop terminal, parking and roadway improvements in a manner that does not preclude future development beyond a 10 year timeframe; or
  - Proceed with incremental developments without preserving potential to accommodate demand long-term

**Plan for the 2020 horizon and beyond - “Long-Term Plan”**

- Bundle potential long-term facilities and additional airfield capacity (e.g. North Parallel Runway) to accommodate projected demand 20 years hence

- Plan Would guide staff on how to proceed with intermediate development over the next ten years that would preserve option for longer term development should the County wish to accommodate these
Defining Elements of a Near-Term Plan

Adopted County Objectives Regarding Airfield Development

- Extend South Runway
- Airfield to be operated pursuant to runway use program, as defined in Interlocal Agreements
- Pursue decommissioning of Crosswind Runway

Resulting Airfield Demand to be Accommodated

- 360,000 to 370,000 annual commercial aircraft operations
- The forecast 80,000 annual General Aviation operations

Commensurate Passenger Traffic

- Up to 17 million annual enplanements (60% greater than 2004)
- Translates to about 10 years of forecast growth in passenger activity

Balanced Inventory of Terminal and Access Facilities

Terminal Facilities:

- 15 to 22 additional gates depending on actual airfield performance
- Concourse A – 5 gates
- Terminal 4 – plus 10 gates
- Redevelopment of Terminal 3 up to 7 additional gates

Landside Access Facilities:

- 4,000 to 5,000 additional public parking spaces
- Roadway improvements at T2 and T3 to relieve bottlenecks
Near-Term Plan Options

A. Configures development in a manner that preserves the option for future development out to 2020 and beyond

B. Only accommodates projected traffic levels out 10-years while seeking to maintain industry low user cost

C. Only accommodates projected traffic levels out 10-years, but provides a higher level of passenger convenience
Near-Term Plan – Option A: Preserves for Future Options

Option A features include:

- New Concourse A and Terminal 4, as currently planned
- Redevelopment and extension of Terminal 3 to the west including an airside APM in a configuration compatible with future development
- Redevelopment of Palm Garage and roadway improvements to support near-term and potential long-term program at Terminal 3 site
- New parking at intermodal center site.
- Automated People Mover connecting from intermodal site to terminals
- Land acquisition to east of airport for development of airport to seaport APM
Near-Term Plan – Option B: Incremental Development

Option B features include:

- New Concourse A and Terminal 4, as currently planned
- Extension of Terminal 3 concourses to the west with limited passenger additional amenities
- New parking at intermodal center site
- Lower cost and lower service levels than other near-term options
Near-Term Plan – Option C: Enhanced Service Levels

**Option C features include:**

- New Concourse A and Terminal 4, as currently planned
- Redevelopment and extension of Terminal 3 to the west including airside APM
- Redevelopment of Palm Garage and roadway improvements to provide higher level of passenger service
- New parking at intermodal center site
- Automated People Mover connecting from intermodal site to terminals
- Higher cost than Option B but does not preserve for future development as in Option A
Elements of a Long-Term Plan

Adopting a long-term plan would:

- Preserve land for facilities having the potential to accommodate forecast traffic beyond 10 year time horizon
- Provide a framework for near-term decision-making regarding interim such that these are not inconsistent with future demand levels

Additional airfield capacity could be provided in one of two ways:

1. Phase-out use restrictions on South Runway after extension is competed, and/or
2. Develop a North Parallel Runway

Resulting Airfield Capacity:

- 475,000 to 500,000 annual commercial aircraft operations
- A reduced level of G. A. annual operations

Commensurate Passenger Volume:

- Up to 23 million annual enplanements (over two times the level in 2004)

Balanced Inventory of Terminal and Access Facilities:

- Up to 15 incremental passenger gates beyond the near-term program
- 2,000 to 3,000 additional parking spaces
- Transit and intermodal access alternatives to substitute for unavoidable parking shortfalls
- Relocation of functions on north side if North Parallel Runway is pursued
- Land acquisition
- Environmental mitigation
Long-Term Plan Features

Long-Term Plan features include:

- Provides for incremental development of 15 gates for a total of 94 gates
- Centralizes international gates on westside of terminal area
- Links terminal complex together thereby providing more curb area for passenger pickup and dropoff
- Extends airside APM into midfield terminal complex.
Factors Affecting Program Affordability

- **Five core drivers of capital program affordability**
  - Pre-existing cost structure and debt outstanding
  - Willingness to charge users for cost of facilities and user acceptance
  - Cost and scale of proposed projects
  - Potential of realizing a PFC rate level increase through Congress
  - Capacity to finance program on forecast growth

- **Basic choices**
  - Sustainability of “low cost” status
  - Priorities for use of County’s PFCs
  - Business relationship with airline tenants
  - Quality of facilities, levels of service, and amenities for customers
Financial Capacity Findings:
Airline Cost per Enplaned Passenger (CPE)

Observations:
- Comparison to:
  - Other large-hub airports
  - Other Florida large- and medium-hub airports
- FLL has lower CPE ($4.13) than:
  - Large-hub median ($6.43)
  - All but 1 Florida airport and 5 other large-hub airports
- Low CPE is largely a function of rate-setting method used today

Notes:
1) Reflects most recent available data (2005)
2) Excludes Luis Munoz Marin International Airport and Louis Armstrong New Orleans International Airport.
(a) At the New York airports, various terminal facilities have been funded by special facility debt and/or airline equity. Thus, published CPE numbers are lower than actual CPE once special facility debt, airline equity and O&M for terminal facilities are included. According to various published sources, the total current CPE at these airports could be as high as $50. Future CPE has yet to be determined, as CPE levels will depend on levels of investment and future traffic.
Financial Capacity Findings: Debt per Enplaned Passenger (DPE)

**Observations:**

- Today FLL has lower debt per enplaned passenger ($76.64) than large-hub median ($93.36)
- Through 2011, outstanding debt will be reduced significantly
- Implementation of South Runway Extension will boost outstanding debt
- Lack of accumulated airport equity may lead to constrained debt capacity depending on program size and timing

---

Notes: 1) Includes general airport revenue bonds, PFC and special facility debt for terminal and parking projects. Excludes special facility debt for rental car and other facilities.
2) MWAA is the Metropolitan Washington Airports Authority, which includes Washington National and Dulles airports.
3) Excludes Port Authority of New York and New Jersey, the Puerto Rico Ports Authority and the Port of Oakland, which are multi-purpose port authorities that operate airports, seaports and other facilities that issue consolidated debt.
Observations:

- FLL has lower landing fee ($0.97) than:
  - Large-hub median ($2.36)
  - All but 1 Florida airport and three other large-hub airports

- Level of PFC funding for South Runway extension has a direct impact on landing fee rate and capacity to fund other elements of a development program.
Financing Capacity Conclusions: Business Arrangements with Airlines Can Change Over Time

Current Airline Agreement
- Signatory airlines must approve bonds and capital expenditures paid by rates and charges
- The airlines:
  - Get nonairline revenue credit
  - Pay all remaining costs
- Limits the County’s equity for projects

The County can change the future framework for Airport management
- Decide whether to have an agreement
- Match any agreement terms with County policies
  - Any airline capital approval rights
  - Keep or credit nonairline revenue
  - Change rate-setting methodology
  - County’s ability to generate and spend equity
Next Steps

- Conduct stakeholder and public outreach initiatives from November through January

- Brief Board members on results and recommendations in 1st Quarter of 2006

- Board selects preferred plan
Conclusions

- FLL’s Growth and Demand Continues to Exceed National Levels

- Airfield Congestion Solutions (Short Term and Long Term)

- Future Development “Blue Print” Based On Master Plan and EIS/ROD

- Environmental Impact Mitigated Through the Part 150 and GAI