

Building a Strategic Alliance for Florida's Mobility



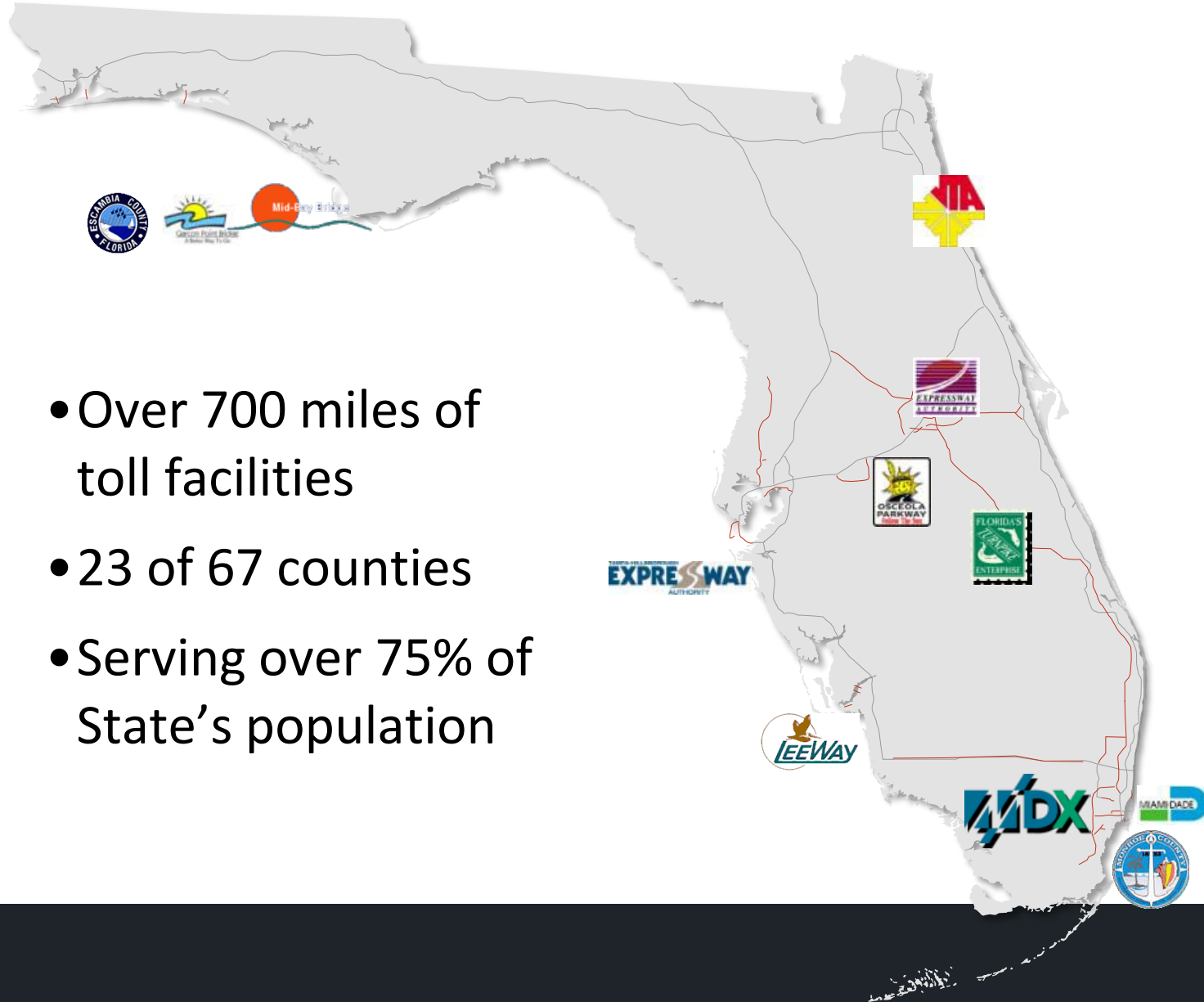
- Formed in 1997
- Information exchange
- Discuss statewide transportation issues (hurricanes, safety, PPP, etc.)
- Leverage financial capabilities



2 Categories of Membership



TEAMFL Members



- Over 700 miles of toll facilities
- 23 of 67 counties
- Serving over 75% of State's population

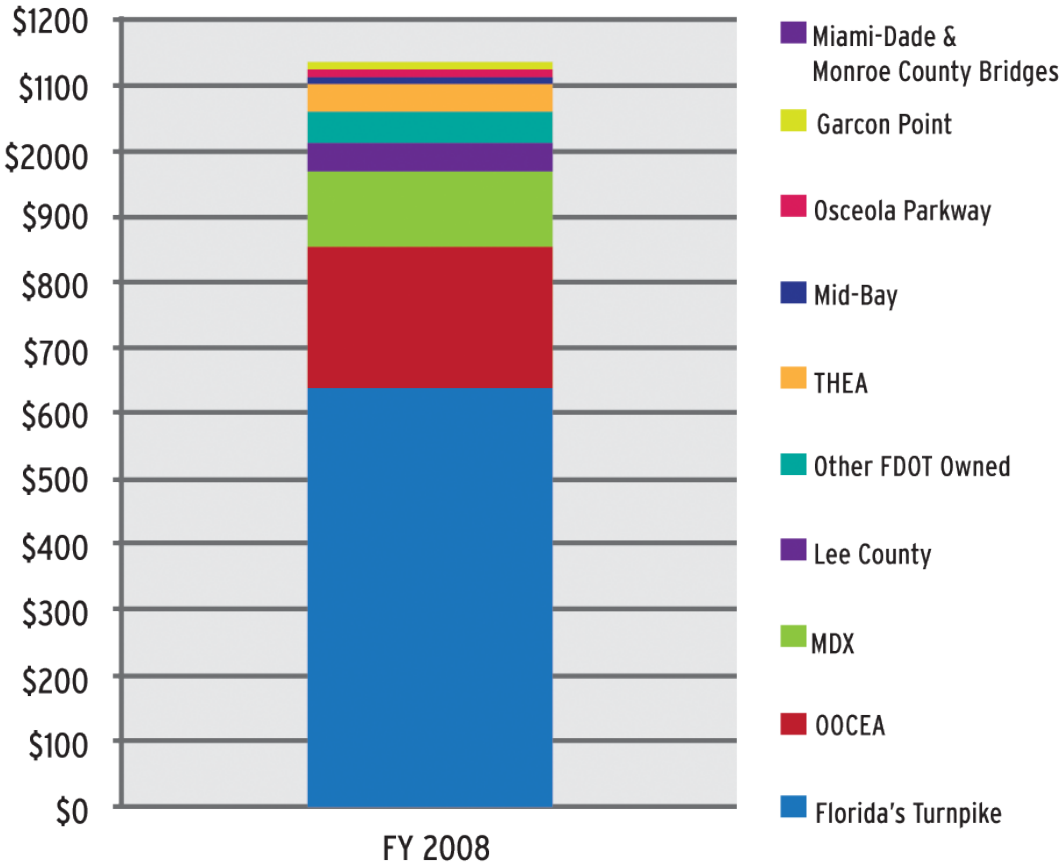
- Over 10B vehicle miles traveled on toll facilities each year
- Nearly 2 ½M customers drive Florida's toll roads and bridges each day
- Customer satisfaction surveys:
 - 91% overall / 97% ETC satisfiedRecent surveys (TPK/OOCEA)



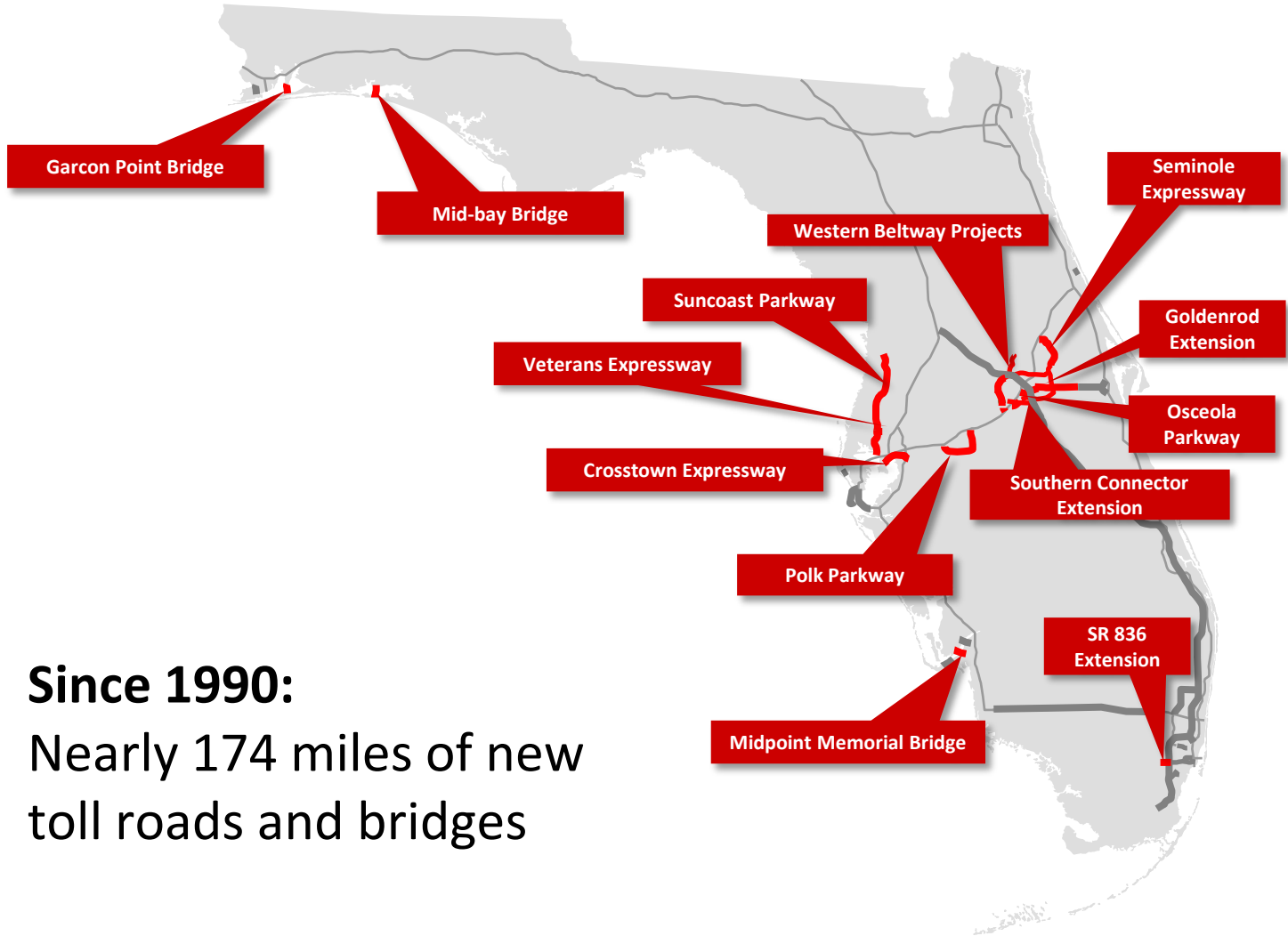
Gross Revenues by Toll Facility

- Gross Revenue Impacts:

- Over \$1B in non-tax revenues
- Similar to 11¢ gas tax
- Growing at ≈ 1¢ gas tax per year
- Backs ≈ \$5B revenue bonds



Toll Roads and Bridges Since 1990



Since 1990:
Nearly 174 miles of new
toll roads and bridges

Florida Toll Roads and Bridges

- Since completion of the Interstate (1993), 91% of new corridors are toll facilities
- Over \$10B invested in user-financed facilities



- Additional \$45B over 25 years needed to fund highway portion of Strategic Intermodal System
- Each \$1B investment in transportation = 27 – 30 thousand jobs
- Each \$1 invested in transportation = \$5 benefit to economy



Florida Transportation Commission Oversight of TEAMFL Members

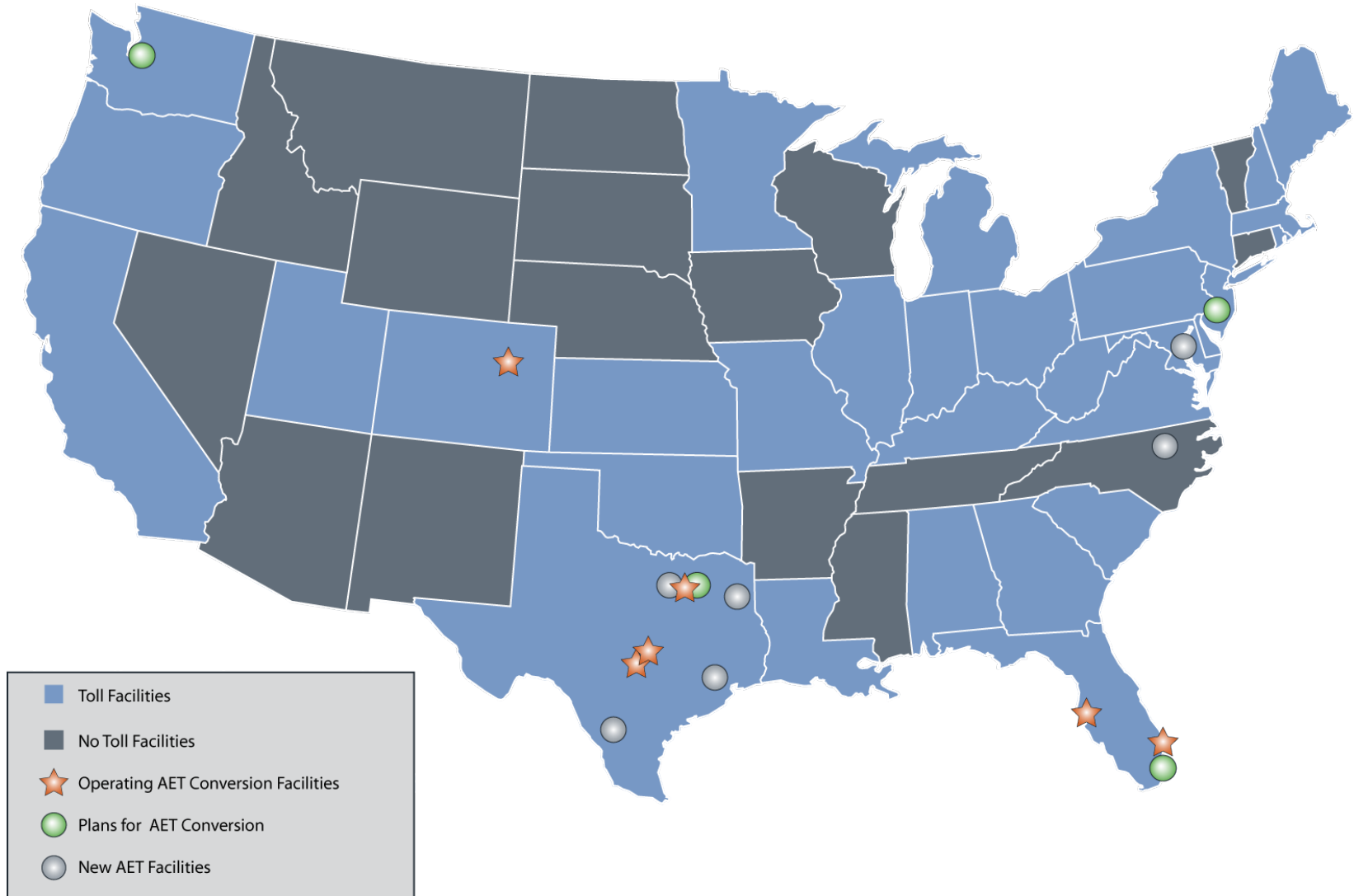


- Statutory Authority
- Ten active Authorities and Florida's Turnpike
- Efficiency, productivity, management, operations/budget/management of bonds, compliance with laws and accounting principles
- 17 performance measures for Toll Authorities
- Eight Toll Authority operations indicators
- Annual report to Governor and Legislature

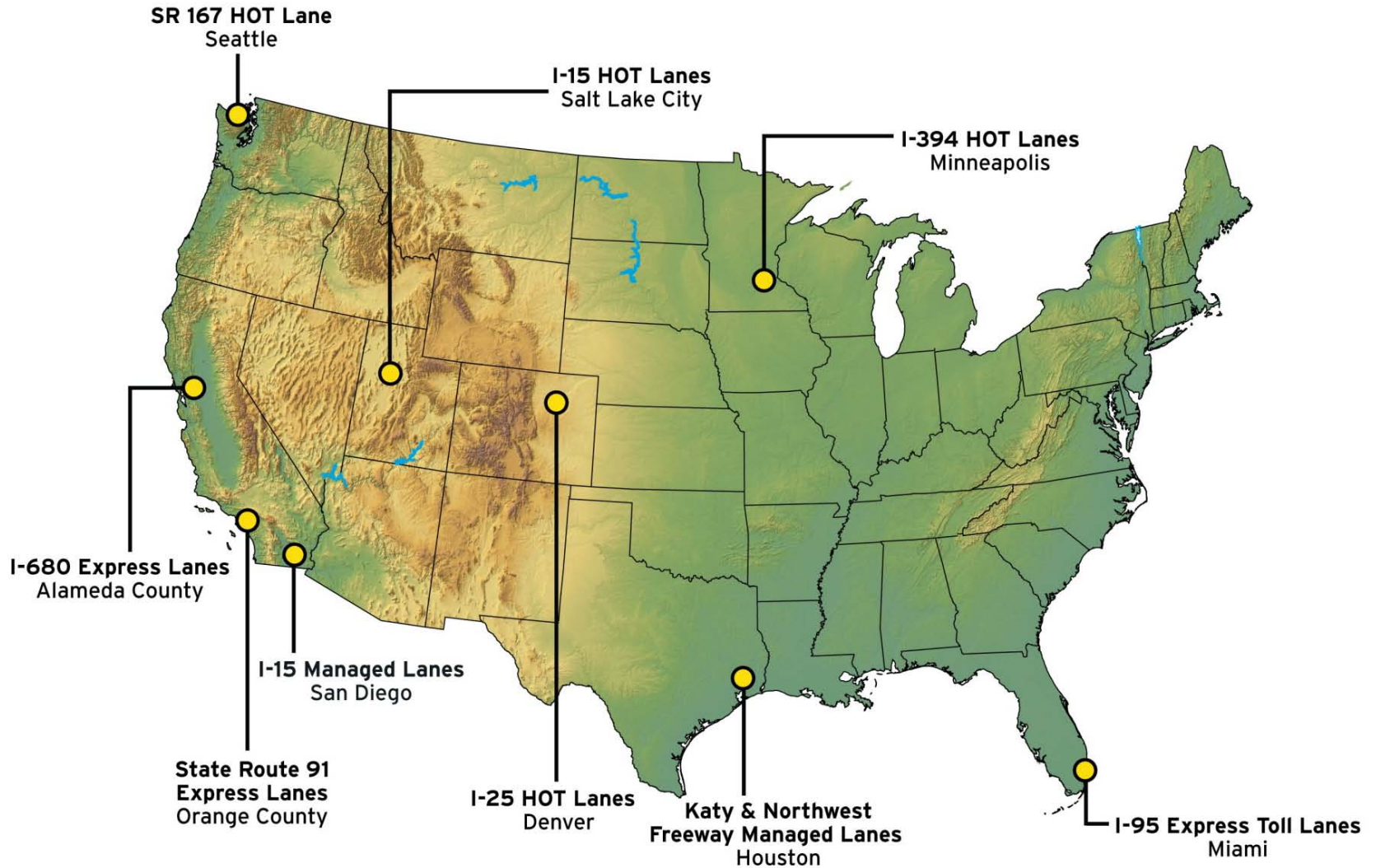
- Growing trend in user-financed facilities to counter shortfalls in conventional (gas tax) funding
- TEAMFL agencies have common mission:
Help Meet Florida's growing transportation needs
- User-financed facilities are part of the solution
- TEAMFL agencies are financially sound and run like a business (public sector motives using private sector methods)
 - Financial engine prompted by growing traffic and revenue
 - Multi-billion dollar work programs
 - High bond ratings safeguard investment community
 - Technology advancements control operating and capital cost outlays
 - Customer satisfaction is high
 - TEAMFL agencies create new jobs in Florida

Overview of Toll Industry in the United States

Status of All Electronic Tolling in North America



Hot Lanes Across America

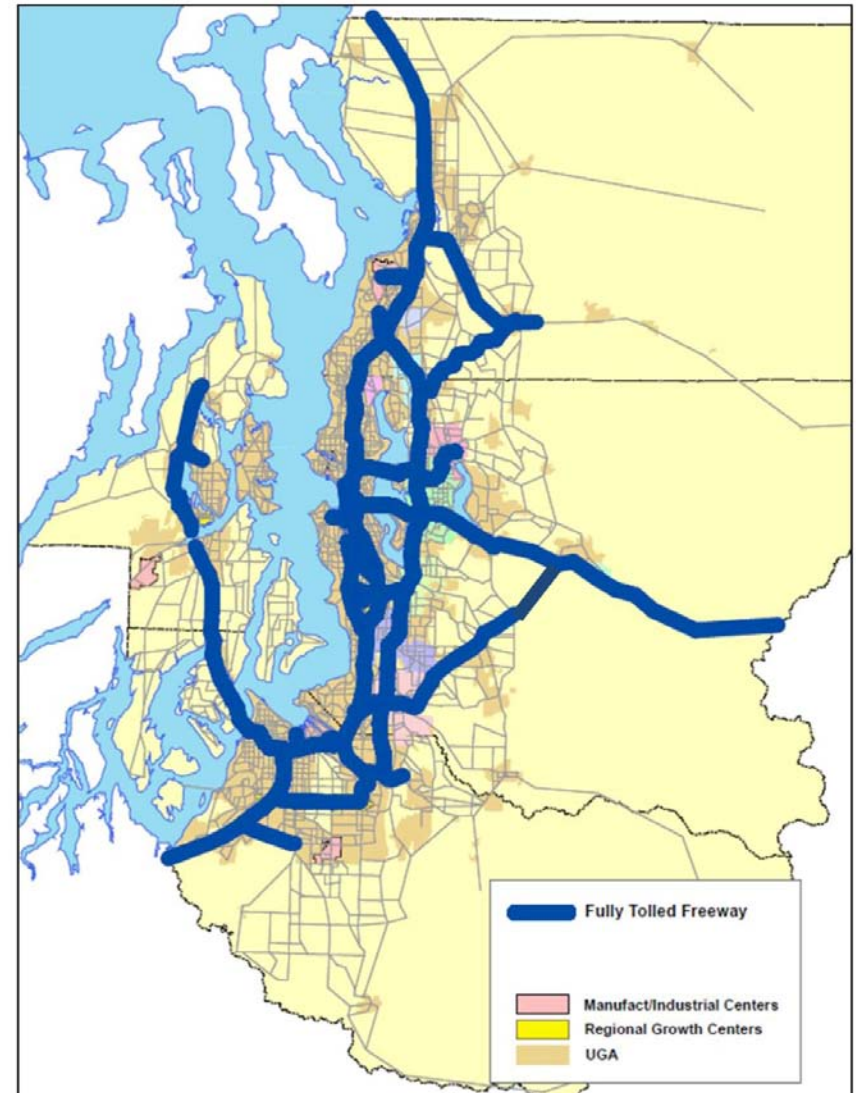




Long Range Constrained:

freeway system tolling

System-level tolls reflect an improved method (relative to previous alternative analysis) for estimating optimal toll rates.



Occupancy Detection Pilot

- What is the Pilot Project?
- Status of the Project
- Preliminary Results



California Self Help Counties



Toll Rate Adjustments in 2008

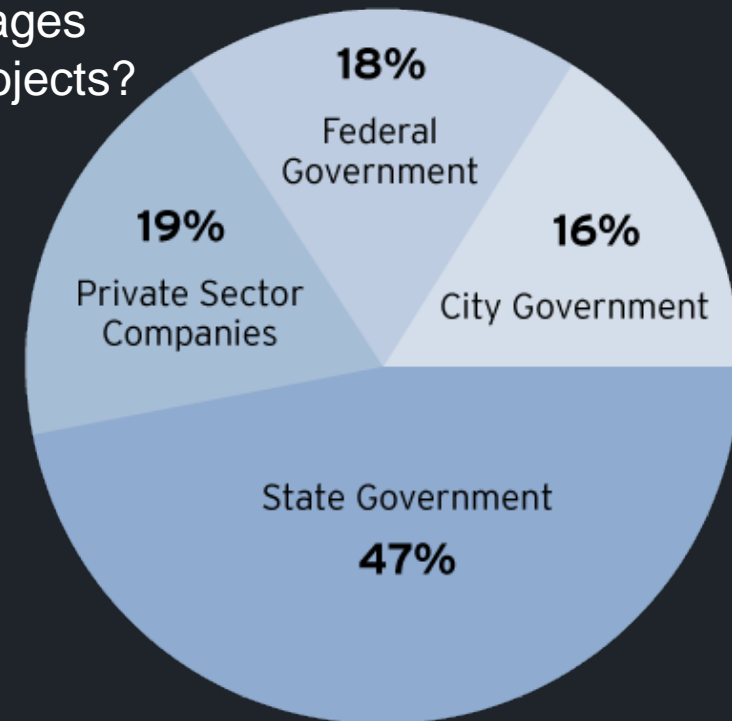
- New Jersey Turnpike
- Delaware River Port Authority
- New York State Thruway
- Garden State Parkway (NJ)
- Indiana Toll Road
- Massachusetts Turnpike
- E-470 (CO)
- Dulles Greenway (VA)
- Pocahontas 895 (VA)
- San Joaquin Hills / Foothill Eastern Toll Roads (CA)
- Chicago Skyway (IL)
- Port Authority of NY/NJ
- Northwest Parkway (CO)
- Richmond Metropolitan Authority (VA)
- Atlantic City Expressway

Toll Rate Adjustments Since January 2009

- Illinois Tollway
- Pennsylvania Turnpike
- New Hampshire Turnpikes
- Indiana Toll Road
- Miami-Dade Expressway
- E-470 (CO)
- Dulles Greenway (VA)
- Orlando Orange County Expressway Authority
- San Joaquin Hills / Foothill Eastern Toll Roads (CA)
- North Texas Tollway Authority
- Maine Turnpike
- Northwest Parkway (CO)
- South Bay Expressway (CA)
- OCTA SR-91 (CA)
- Maryland Transportation Authority
- West Virginia Parkways
- Southern Connector (SC)
- Oklahoma Turnpikes
- Forth Bend County Toll Road
- New York MTA

Public perception is changing

Q. Who do you think best manages and maintains infrastructure projects?



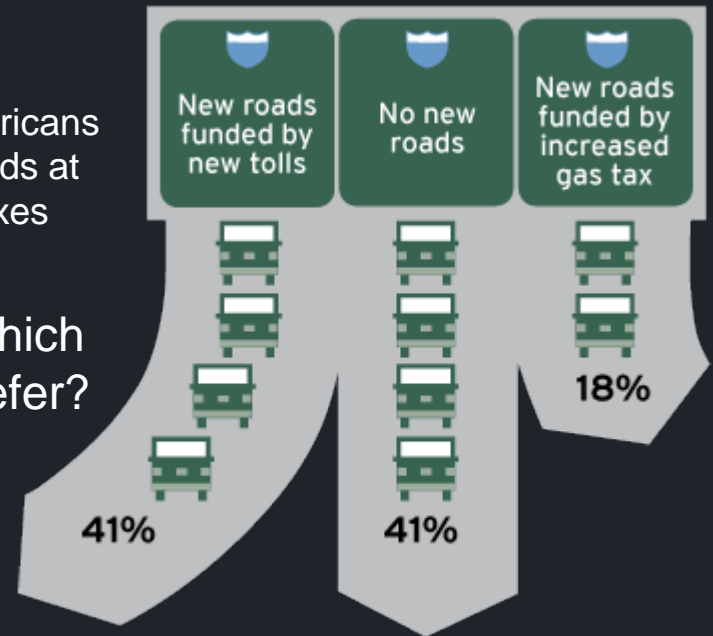


Public perception is changing

TAXES, TOLLS OR NO NEW ROADS

When given a choice, eight in 10 Americans prefer tolls (41 percent) or no new roads at all (41 percent) over increased gas taxes (18 percent).

Q. If you had to select one, which of the following would you prefer?



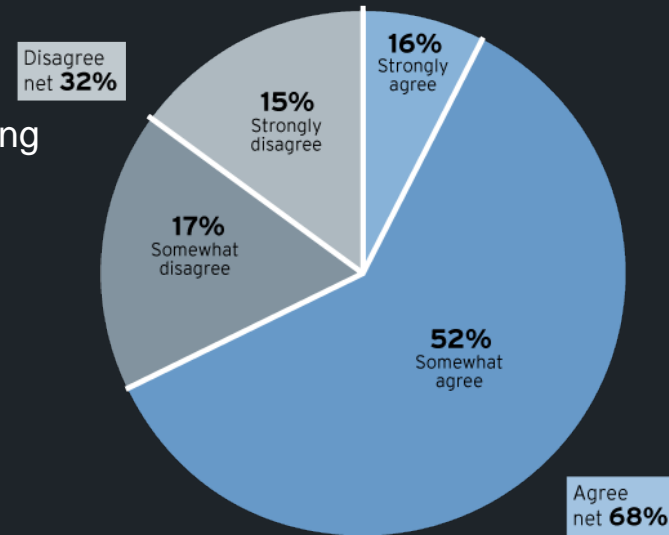


Public perception is changing

TIME SAVINGS RAISES TOLLING'S APPEAL

More than six in 10 Americans would be willing to pay a higher toll fare if it saves them time.

Q. How strongly do you agree or disagree with the following statement: I would be willing to pay a higher toll fare if it saved me travel time.





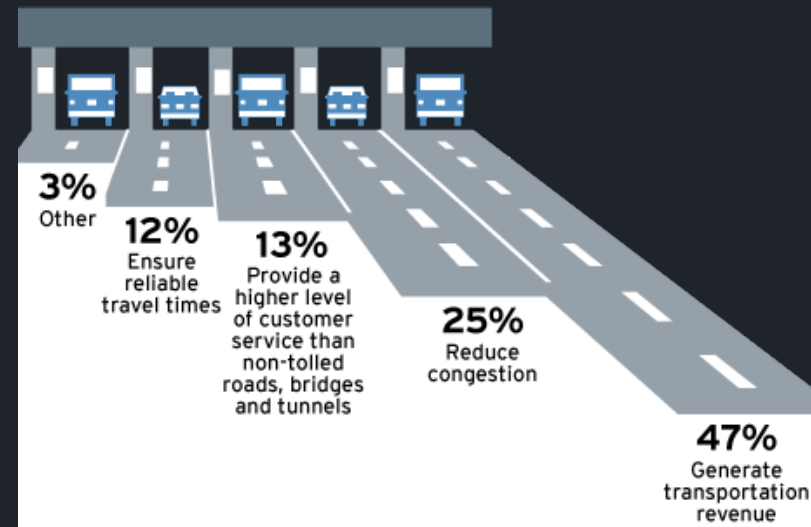
Public perception is changing

TOLLS MEAN REVENUE

Nearly half of America say a toll facility's most important purpose is to provide funds for transportation infrastructure.

Q. Which of the following is the most important purpose of a toll facility?

Please think of a "toll facility" as all of the infrastructure associated with a road, bridge or tunnel where drivers pay a fee for its use.





- State Departments of Transportation beginning toll programs and more Regional Mobility Authorities
- Toll Agencies focused on:
 - Accountability and transparency
 - Business operations and efficiency
 - Innovative funding partnerships
 - Accelerated program delivery
 - Community service
 - Performance management
- Alternative Revenue Strategies



- Florida is a national leader and model for transportation partnership and tolling
- More toll Agencies in the 21st century
- Pricing used to manage congestion and generate revenues
- Greater use of technology to improve customer safety and service
- Public opinion more positive on tolling if there is perceived value
- Performance management