Hosted by:
Scott Haggerty, 1st District Supervisor
Nadia Lockyer, 2nd District Supervisor
Alameda County
Bay Area Plan

Ken Kirkey, ABAG
Planning Director
(510) 464-7955
KennethK@abag.ca.gov

Doug Kimsey, MTC
Planning Director
(510) 817-5790
dkimsey@mtc.ca.gov
SB 375
Requirements

• Reduce greenhouse gas emissions from cars and trucks in the Bay Area by 15% per capita by 2035
• House the region’s population at all income levels
• Use realistic demographic and revenue assumptions
• Align transportation investments, housing growth, and land use planning
• Adopt in early 2013 by ABAG and MTC
Initial Vision Scenario

Building on an Existing Framework

• Local-regional partnership to support sustainable growth and protect natural resources

• A sustainable regional growth pattern supported by policies and incentives

• Incorporates local input on places and policies for sustainable growth via locally-selected Priority Development Areas (PDAs)
## Regional Growth Overview

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Households</th>
<th>Population</th>
<th>Employed Residents</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>2,669,800</td>
<td>7,348,300</td>
<td>3,152,400</td>
<td>3,271,300</td>
</tr>
<tr>
<td>2035 Current Regional Plans</td>
<td>+633,500</td>
<td>+1,717,900</td>
<td>+881,600</td>
<td>+1,129,100</td>
</tr>
<tr>
<td>2035 Growth Increment</td>
<td>+269,000</td>
<td>+363,700</td>
<td>+165,000</td>
<td>+92,900</td>
</tr>
<tr>
<td>2035 Initial Vision Scenario</td>
<td>+902,500</td>
<td>+2,081,600</td>
<td>+1,046,600</td>
<td>+1,222,000</td>
</tr>
<tr>
<td>Total 2035 Initial Vision Scenario</td>
<td>3,572,300</td>
<td>9,429,900</td>
<td>4,199,000</td>
<td>4,493,300</td>
</tr>
</tbody>
</table>
## Initial Vision Scenario

### Housing Distribution

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>2010 Households</th>
<th>2035 Households</th>
<th>2010-2035 Growth</th>
<th>2010-2035 Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda</td>
<td>557,700</td>
<td>770,400</td>
<td>212,700</td>
<td>38%</td>
</tr>
<tr>
<td>Contra Costa</td>
<td>392,700</td>
<td>546,700</td>
<td>154,000</td>
<td>39%</td>
</tr>
<tr>
<td>Marin</td>
<td>106,400</td>
<td>117,100</td>
<td>10,700</td>
<td>10%</td>
</tr>
<tr>
<td>Napa</td>
<td>51,300</td>
<td>56,100</td>
<td>4,800</td>
<td>9%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>346,700</td>
<td>436,800</td>
<td>90,100</td>
<td>26%</td>
</tr>
<tr>
<td>San Mateo</td>
<td>264,500</td>
<td>358,300</td>
<td>93,800</td>
<td>36%</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>613,900</td>
<td>867,800</td>
<td>253,900</td>
<td>41%</td>
</tr>
<tr>
<td>Solano</td>
<td>148,200</td>
<td>187,800</td>
<td>39,600</td>
<td>27%</td>
</tr>
<tr>
<td>Sonoma</td>
<td>188,400</td>
<td>231,400</td>
<td>42,900</td>
<td>23%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>2,669,800</strong></td>
<td><strong>3,572,300</strong></td>
<td><strong>902,600</strong></td>
<td><strong>34%</strong></td>
</tr>
</tbody>
</table>
## Initial Vision Scenario
### East/South Alameda County Housing Distribution

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>2010 Households</th>
<th>2035 Households</th>
<th>2010-2035 Growth</th>
<th>2010-2035 Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dublin</td>
<td>15,572</td>
<td>32,216</td>
<td>16,644</td>
<td>106.9%</td>
</tr>
<tr>
<td>Fremont</td>
<td>71,004</td>
<td>98,564</td>
<td>27,560</td>
<td>38.8%</td>
</tr>
<tr>
<td>Hayward</td>
<td>46,300</td>
<td>61,283</td>
<td>14,982</td>
<td>32.4%</td>
</tr>
<tr>
<td>Livermore</td>
<td>28,662</td>
<td>40,801</td>
<td>12,138</td>
<td>42.3%</td>
</tr>
<tr>
<td>Newark</td>
<td>13,530</td>
<td>19,331</td>
<td>5,802</td>
<td>42.9%</td>
</tr>
<tr>
<td>Pleasanton</td>
<td>24,034</td>
<td>33,819</td>
<td>9,785</td>
<td>40.7%</td>
</tr>
<tr>
<td>Union City</td>
<td>20,420</td>
<td>25,900</td>
<td>5,480</td>
<td>26.8%</td>
</tr>
<tr>
<td>Unincorporated</td>
<td>51,265</td>
<td>63,872</td>
<td>12,606</td>
<td>24.6%</td>
</tr>
</tbody>
</table>
Housing Distribution

- 70% of growth in PDAs and Growth Opportunity Areas
- 97% of growth within the existing urban footprint
- Preserves character of existing residential neighborhoods
- Utilizes existing transit; strengthens planned transit
- Provides for rapid growth in senior population
- Lower per capita water use due to growth location, development type
## Employment Distribution

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>2010 Jobs</th>
<th>2035 Jobs</th>
<th>2010-2035 Growth</th>
<th>2010-2035 Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda</td>
<td>675,600</td>
<td>925,400</td>
<td>249,900</td>
<td>37%</td>
</tr>
<tr>
<td>Contra Costa</td>
<td>345,900</td>
<td>479,400</td>
<td>133,400</td>
<td>39%</td>
</tr>
<tr>
<td>Marin</td>
<td>129,700</td>
<td>151,100</td>
<td>21,400</td>
<td>17%</td>
</tr>
<tr>
<td>Napa</td>
<td>70,100</td>
<td>88,800</td>
<td>18,700</td>
<td>27%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>544,800</td>
<td>713,700</td>
<td>168,900</td>
<td>31%</td>
</tr>
<tr>
<td>San Mateo</td>
<td>330,100</td>
<td>452,200</td>
<td>122,100</td>
<td>37%</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>858,400</td>
<td>1,238,400</td>
<td>380,000</td>
<td>44%</td>
</tr>
<tr>
<td>Solano</td>
<td>126,300</td>
<td>176,700</td>
<td>50,400</td>
<td>40%</td>
</tr>
<tr>
<td>Sonoma</td>
<td>190,400</td>
<td>267,600</td>
<td>77,200</td>
<td>41%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>3,271,300</strong></td>
<td><strong>4,493,300</strong></td>
<td><strong>1,222,000</strong></td>
<td><strong>37%</strong></td>
</tr>
</tbody>
</table>
Initial Vision Scenario

Transportation Network

- Transportation 2035 is base network with Express Lane Backbone system
- Improvement to existing transit services adjacent to Initial Vision growth areas
- Increased frequencies on over 70 local bus routes and several express bus routes
- Increased frequencies on BART, eBART, Caltrain, Muni Metro, VTA Light Rail, and ACE
- 60 miles of dedicated bus lanes in San Francisco and Santa Clara counties
SCS/RTP Performance Targets

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>
| 1 | Reduce CO2 emissions from cars and light trucks by 15% in 2035  
   | *(IVS achieves 12%)*                                                                     |
| 2 | House 100% housing growth by all income segments, without displacing current low-income residents |
| 3 | Reduce premature deaths from PM exposure 10%                                              |
| 4 | Reduce injuries and fatalities from collisions by 50%                                     |
| 5 | Increase walking and biking 60%                                                           |
| 6 | Direct development within urban footprint                                                  |
| 7 | Decrease H+T costs 10% for low-income households                                          |
| 8 | Increase GRP by 90%                                                                        |
| 9 | Decrease average per-trip travel time by 10% for non-auto modes  
   | Decrease automobile vehicle miles traveled per capita by 10%                             |
|10 | Maintain the transportation system in a state of good repair                              |
Outreach to Local Jurisdictions

What Have We Heard?

• Accommodating all demand for housing regionally and locally will be a big challenge (particularly given market conditions)

• Placement of housing and jobs appears too aggressive in some areas, while growth potential in other PDAs is underutilized

• Difficult for many jurisdictions to even plan for future growth given staff resources

• Substantial focused growth planning completed but inadequate capital resources to support development

• Need to consider jobs/housing balance-fit

• Need to develop an economic development strategy
Alternative Land Use Scenario Concepts

More Concentrated Growth

Housing and Employment Growth is distributed among Priority Development Areas (PDAs) in a manner that reduces greenhouse gas reductions and incorporates local input on Initial Vision Scenario, increased employment location emphasis.

Most Concentrated Growth

Housing and Employment growth is concentrated in and around existing centers.

Dispersed Growth

Shifting more jobs towards housing growth in outer areas of the region.
Alternative Transportation Scenarios

- Continued maintenance focus
- Transit sustainability options
- Strategic expansion
- Your ideas?
Alternative Transportation Policy Scenarios

- Transportation Demand Management (e.g., telework, commuter benefits, ridesharing services)
- Eco-Driving (e.g., establish 55 mph speed limit, educate drivers about how to drive to save fuels and reduce emissions)
- Electric vehicle and charging infrastructure (beyond what’s assumed by Air Resources Board)
- Parking Pricing (e.g., charge higher rates during peak hours, charge for employer parking)
- Other Pricing Strategies (e.g., Regional Express Lane Network, other tolling or vehicle fee approaches)
## Alternative Scenario Timeline

<table>
<thead>
<tr>
<th>Event</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop alternative scenarios through an iterative process</td>
<td>Now – June 2011</td>
</tr>
<tr>
<td>Present alternative scenarios for initial review and then approval by MTC and ABAG</td>
<td>June – July 2011</td>
</tr>
<tr>
<td>Start scenario analysis</td>
<td>August 2011</td>
</tr>
<tr>
<td>Release scenario results</td>
<td>October 2011</td>
</tr>
<tr>
<td>Seek public review and comment on scenario results</td>
<td>October 2011</td>
</tr>
<tr>
<td>Review of preferred scenario by MTC and ABAG</td>
<td>January 2012</td>
</tr>
<tr>
<td>Approval of preferred scenario by MTC and ABAG</td>
<td>February 2012</td>
</tr>
</tbody>
</table>
Why Update the BAAQMD CEQA Guidelines?

• Provide guidance to local lead agencies in evaluating air quality impacts of land use development
• Include thresholds of significance, analytical tools, mitigation measures
• Last published 1999, update needed
  - Attain health-based air quality standards for ozone & fine PM
  - Reduce local health impacts from toxic air contaminants & fine PM
    - Highest exposures to toxics & fine PM near roadways, industry
  - GHG reductions to achieve AB 32, SB 375
• Goal: encourage air quality beneficial land use
  - Support infill, TOD, mixed use
  - Minimize public health impacts of new development
GHG Thresholds

- Address critical void
  - No thresholds for GHGs in CEQA previously existed
  - Legal scrutiny by AG, environmental groups
- Based on AB 32 and Scoping Plan – allows statewide consistency
- Thresholds options – land use projects
  - Plan based – consistency with GHG reduction strategy OR
  - “Bright line” – 1,100 metric tons/yr OR
  - Efficiency based – 4.6 tons/service population/yr (residents and employees)
- Credit for lower vehicle use/efficiencies of infill, mixed use projects
- Thresholds will be revisited if/when State guidance available
- Consistent w/Office of Planning & Research State CEQA Guidelines
- Provides certainty: legally defensible approach, level playing field
Local Community Risks and Hazards

- CARE program identifies 6 priority communities in Bay Area
  - High emissions, concentrations of toxics & vulnerable populations
- Quantitative thresholds or plan-based approach
  - Address new sources of pollution and new receptors near existing sources (e.g. freeways)
  - Thresholds address PM and toxic risk
  - Consider localized impacts – within 1,000 feet
  - Consider individual sources and cumulative impacts
- Promote infill, while protecting residents
- Potential conflicts may often be resolved through site specific analysis and reasonable mitigation
- Encourage community risk reduction plans
  - Community-wide plans to reduce cumulative impacts
  - Pilot projects in San Jose, San Francisco
Assisting Implementation / Support for Infill, TOD

- Support plan-based approaches to minimizing GHGs, local AQ impacts
- Provide technical support to local government, developers
  - Provide training and technical support tools
  - Assist with analyses, data requests, etc.
  - Funding and technical assistance for climate action plans and community risk reduction plans
- Update & refine screening tools, clarify project screening process
- Refine and standardize mitigation measures
- Collaborate with regional, local agencies on community-wide planning in PDA communities
Regional Agency Collaboration

- Convened Air Quality/PDA workgroup with MTC & ABAG
  - Encourage & assist in addressing air quality impacts in station area plans
  - Streamline CEQA review for future projects
  - Coordinate with S.B. 375 process
  - Presented to local planners at Station Area Planning workshop

- Participating in and tracking S.B. 375 process
- Discussing regional programs with Bay Area Planning Directors
  - Participate at BAPDA Symposium June 2011
Bay Area Conservation and Development Commission Joe LaClair, Chief Planner
415-352-3600
JoeL@bcddc.ca.gov

Adapting to Rising Tides
The ART Project
Living with a Rising Bay

A Regional Sea Level Rise Assessment

Photo: Noelle Murata

Critical infrastructure at risk
- 99 miles of major road and highway
- 81 schools
- 70 miles of railroad
- 42 healthcare facilities
- 22 wastewater treatment facilities
- 11 fire stations
- 9 police stations
- 5 major ports

The map illustrates shoreline areas of San Francisco Bay that could be inundated by a 16-inch (blue) and 55-inch (purple) sea level rise.

Photo: Jessica Merz

Photo: Mark Taylor, EBRPD
The ART Subregion
The ART Project

The goal of the ART Project is to increase the preparedness and resilience of Bay Area communities to sea level rise and other climate change impacts while protecting ecosystem and community services.
ART Adaptation Strategies & Tools
ART Adaptation Planning Process

**ORGANIZE**
- Assemble a project team
- Scope project, determine planning area

**ASSESS**
- Evaluate climate impacts
- Determine vulnerability and risk

**PLAN**
- Identify and prioritize adaptation strategies
- Create plan or integrate strategies into existing plans

**IMPLEMENT & MONITOR**
- Implement high priority actions
- Track progress and revise plan as needed
What is a Vulnerability and Risk Assessment?

**Vulnerability** is the susceptibility of people, property, and resources to a hazard. It depends on the type of impact, and the sensitivity and adaptive capacity of the impacted.

**Risk** is the threat posed by an impact or hazard. It depends on the likelihood of an impact and the magnitude of the consequence.
ART Comprehensive Approach

“There is high confidence that neither adaptation nor mitigation alone can avoid all climate change impacts; however, they can complement each other and together can significantly reduce the risks of climate change.”

2007 IPCC Fourth Assessment Report
**ART Teaming up with Mitigation**

**Teaming up with mitigation efforts**
California is moving ahead with mitigation at regional, state, and local levels. To leverage resources and increase the value and effectiveness of results, the ART project will coordinate with regional-scale mitigation programs.

**FOCUS**
A development and conservation strategy for the San Francisco Bay Area

**OneBayArea**
Collaborative efforts for developing the region’s Sustainable Communities Strategy

---

**Mitigation and Adaptation**
A climate strategy involves both mitigation and adaptation. Mitigation refers to policies to reduce greenhouse gas emissions or enhance greenhouse gas sinks. Adaptation refers to actions undertaken to reduce the vulnerability of the built and natural environment to the actual or expected effects of climate change.

**Mitigation**
- Reduced Air Travel
- Energy Conservation
- Active Transportation
- Captured Landfill Gas
- Expand Transit Use

**Adaptation**
- Green Roofs
- Better Insulation
- Permeable Pavement
- Reduced Peak Demand
- Expand Tree Canopy
- Sewer Upgrade
- Heat Alert System
- Business Continuity Planning
- Vector Eradication
- Control of Invasive Species

ART Partnerships

Funding and Support

- NOAA Coastal Services Center
- FHWA
- MTC
- Caltrans
- ICLEI
Projects Assisting **ART**

**Regional Assessment**

**Adaptation Assistance**
ART Next Steps

Adapting to Rising Tides Project

Adaptation Planning Process

- Gather climate change impacts information
  - Involve experts, local stakeholders, and local government agencies
- Assemble Climate Change Planning Team
- Vulnerability and risk assessment
  - Identify priority planning areas
- Identify and prioritize adaptation strategies
  - Develop a response plan and/or integrate strategies into existing plans
- Implement adaptation strategies
- Measure progress and update strategies and plans
Adapting to Rising Tides: Bay Area Communities Working Together

The San Francisco Bay Conservation and Development Commission (BCDC) is partnering with the National Oceanic and Atmospheric Administration Coastal Services Center (NOAA CSC) to work with Bay Area communities to begin planning for sea level rise.

The Bay Area is already working to reduce greenhouse gas emissions, but mitigation alone will not be adequate to address impending sea level rise and other climate change impacts. The Bay Area must consider adaptation actions that will reduce the vulnerability of the built and natural environment to the effects of climate change. The Adapting to Rising Tides (ART) project was created to do just that.

The bay is rising and this is projected to continue. In fact, today’s flood is expected to be the future’s high tide. Areas that currently flood every ten to twenty years during extreme weather and tides will begin to flood regularly. These areas are home to over 160,000 residents, critical infrastructure, diverse habitats, and valuable community resources.

The ART project will bring community members and local and state officials together to collectively gain a better understanding of how sea level rise and other climate change impacts will affect the Bay Area’s ecosystems, infrastructure, and economy. Additionally, ART will identify strategies for community-based adaptation planning to address these challenges and develop a process for implementing them.

Communities have an opportunity to be leaders in planning for the challenges of sea level rise. Actions taken today can serve as a model for the Bay Area and beyond. Please join BCDC and NOAA CSC in planning for the continued success of the Bay Area.

With your participation and support, we will build a strong foundation for the Bay’s future. Please join us!

www.risingtides.csc.noaa.gov
Adapting to Rising Tides

Milestones

• Identified Asset Categories
• Agreed to Planning Approach
• Preliminary Metrics to Characterize Assets
• Formed TAC and Communications Group
Adapting to Rising Tides
Subregional Working Group Meeting

Mid-June 2011
Location TBD
Alameda County Transportation Commission
Art Dao, Executive Director
510-208-7400
adao@alamedactc.org
Two agencies in one: merged July 2010

Alameda CTC builds on success of both ACCMA and ACTIA for enhanced effectiveness in:

- Transportation planning and programming
- Programs and project delivery
- Advocacy for:
  - Congestion relief
  - Mobility and accessibility
  - Sustainability and livability

Merger Goals: Save tax dollars, eliminate redundancies, streamline processes
Major Plan Activities

• Development of Countywide Transportation Plan (CWTP) to guide future transportation investments, policy and legislative advocacy:
  ➢ Vision
  ➢ Technical studies
  ➢ Outreach/stakeholder involvement

• Develop Transportation Expenditure Plan from CWTP
Why These Countywide Plans are Important

• Create a premier transportation system, connected and multi-modal
• Complete communities, both livable and affordable
• Provide a sustainable transportation system:
  ➢ Economically
  ➢ Environmentally
  ➢ Equitably
Relationship with Regional Planning

• Integrated land use and transportation plan (SB 375)
 ➢ Regional Transportation Plan (RTP)
 ➢ Sustainable Communities Strategy (SCS)

• RTP/SCS Must:
 ➢ Identify areas to accommodate region’s population (growth over next 25 years)
 ➢ Develop an RTP that meets the region’s needs
 ➢ Reduce GHGs from automobiles and light trucks

• Countywide Transportation Planning:
 ➢ Feeds projects and programs into RTP/SCS
 ➢ Supports goals of RTP/SCS
 ➢ Integrates land use at the County level
Full Engagement

• Countywide Transportation Plan and Expenditure Plan Development Process
  - Elected Officials Steering Committee
  - Technical Advisory Working Group
  - Community Advisory Working Group

• Community Advisory Committees
  - Paratransit Advisory and Planning Committee (PAPCO)
  - Citizens Advisory Committee (CAC)
  - Bicycle and Pedestrian Advisory Committee (BPAC)
  - Citizens Watchdog Committee (CWC)

• Technical Advisory Committees
  - Alameda County Technical Advisory Committee (ACTAC)
  - Paratransit Technical Advisory Committee (PTAC)

• Quarterly Countywide Transportation Forums
Timeline

2010: Establish Steering and Advisory Committees and Hire Consultant Team

JAN 2011: Finalize Countywide Plans’ Vision and Goals

SPRING 2011: Public Workshops, Outreach and Polling

JULY 2011: Project and Program Evaluation Outcomes

SEP 2011: 1st Draft CWTP

NOV 2011: 1st Draft TEP and Public Workshops

JAN 2012: 2nd TEP, Final Draft CWTP

MAY 2012: Polling

JUL 2012: Adopt Final Plans

AUG 2012: TEP on Ballot

NOV. 6, 2012: VOTE!

JAN 2012: 2nd TEP, Final Draft CWTP

JULY 2011: Project and Program Evaluation Outcomes

SPRING 2011: Public Workshops, Outreach and Polling

JAN 2011: Finalize Countywide Plans’ Vision and Goals

2010: Establish Steering and Advisory Committees and Hire Consultant Team
East Bay Economic Development Alliance
Karen Engel, Executive Director
510-272-3874
Karen@eastbayeda.org
What Makes Our Economy Tick?

• What are we good at?
• How do we make the most of that?
• How are we linked to other regions?
• Economy as a complex eco-system.
• Where do we start?
East Bay Economic Strengths

Old
• Making stuff
• Moving stuff
• Housing people

New
• Inventing stuff
• Producing high value-added services (and some products)
• Housing people
East Bay Employment Concentration and Wages by Industry - 2009

Average annual California wage is $66,000

Source: Quarterly Census of Employment and Wages, California Employment Development Department
East Bay Employment Density
East Bay Employment Share by Subarea, 2009

- South Alameda County: 20%
- Central Alameda County: 11%
- North Alameda County: 22%
- Tri-Valley: 19%
- East Contra Costa County: 5%
- Central Contra Costa County: 17%
- West Contra Costa County: 6%
- Central Alameda County: 11%

Source: NETS, Compass Economics, Strategic Economics.
Driving Industries Employ 40%

UTILITIES
Water, sewage and other systems

CONSTRUCTION
Highway, street, and bridge construction

MANUFACTURING
Petroleum and coal products manufacturing
Industrial machinery manufacturing
Semiconductor and electronic component mfg.
Medical equipment and supplies manufacturing
Electronic instrument manufacturing
Pharmaceutical and medicine manufacturing

WHOLESALE TRADE
Chemical merchant wholesalers
Commercial equip. merchant wholesalers
Electric goods merchant wholesalers

INFORMATION
Software publishers
Motion picture and video industries

FINANCE AND INSURANCE
Other financial investment activities
Insurance carriers

REAL ESTATE AND RENTAL AND LEASING
Offices of real estate agents and brokers

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES
Scientific research and development services
Computer systems design and related services
Architectural and engineering services
Management and technical consulting services

PUBLIC ADMINISTRATION
Administration of economic programs
Employment Density of “Driving” Industries
Share of Employment in “Driving Industries” by Subarea, 2009

- South Alameda County: 21%
- Central Alameda County: 12%
- North Alameda County: 25%
- West Contra Costa County: 7%
- Central Contra Costa County: 15%
- Tri-Valley: 15%
- East Contra Costa County: 5%

Source: NETS, Compass Economics, Strategic Economics.
EB Job Growth is Largely Due to Expansions of Existing Firms

Net Annual Employment Change in the East Bay Region, 1995-2008

Source: NETS, Compass Economics, Strategic Economics.
Job Creation
Average over period

- Births: 55.5%
- Expansions: 37.7%
- Move In: 6.8%

Source: NETS 2009, Calculations by Haveman Economic Consulting
Job Creation
Average over period

- Births, HQ Elsewhere: 29.4%
- Expansions, HQ Elsewhere: 19.0%
- Births, Locally Owned: 18.7%
- Expansions, Locally Owned: 6.8%
- Moves In: 26.1%

Source: NETS 2009, Calculations by Haveman Economic Consulting
Job Destruction
Average over period

- Contractions: 64.5%
- Deaths: 29.9%
- Move Out: 5.7%

Source: NETS 2009, Calculations by Haveman Economic Consulting
County Commute Patterns by All Jobs

- Live in County, Work Outside County
- Live and Work in County
- Live Outside County, Work Inside County

Goods Movement-Dependent Industries are Critical to the Bay Area Economy

100% = $579 Billion

Service Sectors 63%
Goods-Producing Sectors 37%

100% = $213 Billion

- Electrical Machinery, Equipment or Supplies: 42%
- Wholesale Trade: 15%
- Misc. Manufacturing: 9%
- Coal or Petroleum Products: 6%
- Other: 14%
- Transport Equipment: 4%
- Chemicals or Allied Products: 5%
- Food and Kindred Products: 5%
- Manufacture: 9%
SUMMARY OF LAND SUPPLY SCENARIOS FOR GOODS MOVEMENT STUDY CORRIDORS
(Existing and Future Acreage Scenarios by Land Use Type)

- **Industrial**
  - Existing Land Supply: 16,000 acres
  - Scenario 1: Existing Remains: 12,000 acres
  - Scenario 2: Trends Continue: 14,000 acres

- **Comm'V/Ind'/R&D**
  - Existing Land Supply: 8,000 acres
  - Scenario 1: Existing Remains: 6,000 acres
  - Scenario 2: Trends Continue: 7,000 acres

- **Airport/Seaport/Rail**
  - Existing Land Supply: 6,000 acres
  - Scenario 1: Existing Remains: 4,000 acres
  - Scenario 2: Trends Continue: 5,000 acres

- **Pipelines/Refineries**
  - Existing Land Supply: 2,000 acres
  - Scenario 1: Existing Remains: 1,500 acres
  - Scenario 2: Trends Continue: 2,500 acres

## Impacts on the East Bay

### CORRIDOR TRANSPORTATION IMPACTS: ADDITIONAL DAILY TRUCK COUNTS

<table>
<thead>
<tr>
<th>Corridor / Facility</th>
<th>Additional Daily Trucks* 2035</th>
<th>Daily Trucks 2006</th>
<th>Additional Trucks As % Of:</th>
<th>Truck Volumes Otherwise Projected 2035</th>
<th>Total Vehicle Volumes Otherwise Projected 2035</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR-4</td>
<td>597</td>
<td>26%</td>
<td>17%</td>
<td>0.2%</td>
<td></td>
</tr>
<tr>
<td>I-80</td>
<td>860</td>
<td>10%</td>
<td>7%</td>
<td>0.3%</td>
<td></td>
</tr>
<tr>
<td>I-680</td>
<td>618</td>
<td>7%</td>
<td>5%</td>
<td>0.3%</td>
<td></td>
</tr>
<tr>
<td>I-580 (West of I-680)</td>
<td>6,168</td>
<td>66%</td>
<td>46%</td>
<td>2.9%</td>
<td></td>
</tr>
<tr>
<td>I-580 (East of I-680)</td>
<td>6,150</td>
<td>39%</td>
<td>24%</td>
<td>2.6%</td>
<td></td>
</tr>
<tr>
<td>I-580 Average</td>
<td>6,159</td>
<td>49%</td>
<td>35%</td>
<td>2.8%</td>
<td></td>
</tr>
<tr>
<td>I-880</td>
<td>3,839</td>
<td>23%</td>
<td>19%</td>
<td>1.6%</td>
<td></td>
</tr>
<tr>
<td>US-101</td>
<td>1,201</td>
<td>12%</td>
<td>8%</td>
<td>0.4%</td>
<td></td>
</tr>
<tr>
<td>Bay Bridge</td>
<td>420</td>
<td>7%</td>
<td>5%</td>
<td>0.1%</td>
<td></td>
</tr>
<tr>
<td>San Mateo Bridge</td>
<td>1,158</td>
<td>19%</td>
<td>12%</td>
<td>0.9%</td>
<td></td>
</tr>
<tr>
<td>Dumbarton Bridge</td>
<td>519</td>
<td>25%</td>
<td>16%</td>
<td>0.5%</td>
<td></td>
</tr>
</tbody>
</table>

Sources: Cambridge Systematics, CalTrans Truck Counts, MTC Models in *Goods Movement Land Use Project*, December 2008. MTC
Additional Daily Truck Trips in 2035
Next Steps

- Business Climate and Jobs Report available September 2011
- Preliminary findings are being coordinated with the regional and countywide planning efforts
- Bay Area regional economic development strategy under formation