

Executive Summary

Florida's Rail System Plan is one of several key statewide modal planning efforts conducted by the Florida Department of Transportation (FDOT) consistent with the Florida Transportation Plan, including: the Strategic Intermodal System Strategic Plan; the Seaport System; the Aviation System Plan; and Transit 2020.

Rail planning also is closely connected to and supports Florida's economic, environmental, community, and statewide planning framework, including: Metropolitan Planning Organization Long-Range Transportation Plans; Regional Planning Council Strategic Regional Policy Plans; local government comprehensive plans; ongoing regional visioning efforts and community initiatives; transit agency and modal partner development plans; and other private and public rail and freight investment plans.

The Florida Rail System Plan serves as important input into the update of the Florida Transportation Plan. With the advent of the Strategic Intermodal System and additional funding provided by 2005 Growth Management legislation, the Florida Rail System Plan also provides an effective tool to identify capital improvements and prioritize funding needs to ensure the efficient movement of people and goods by rail. Together these long-range, strategic planning initiatives help shape and develop a future-oriented, integrated, and multimodal transportation system for the State of Florida.

The 2010 Florida Rail System Plan is an update to the 2006 Florida Freight and Passenger Rail Plan and is a key part of an evolving rail planning process in Florida. The 2010 Plan builds upon previous efforts, including the work of the Florida High-Speed Rail Authority and the 2006 Florida Intercity Passenger Rail Vision Plan. In recognition of the role of passenger and freight rail within Florida's overall transportation system, the Florida Rail System Plan is consistent with the 2025 Florida Transportation Plan. This statewide plan identifies goals, objectives, and strategies to guide transportation investment decisions in Florida over a 20-year period. The Plan also complies with Florida statutory requirements in 341.302(3) Florida Statutes and Federal requirements, including the Passenger Rail Investment and Improvement Act (PRIIA) of 2008 and the American Recovery and Reinvestment Act (ARRA) of 2009 to ensure state eligibility for certain rail funding programs.

The 2010 Florida Rail System Plan consists of two elements:

1. **The Policy Element** – The Policy Element establishes a vision for passenger and freight rail transportation in Florida and a framework of goals, policies, and strategies to guide future state rail investments and decisions. The Policy Element was adopted by the Secretary of Transportation in March 2009.

2. **The Investment Element** – This document, the Investment Element, builds upon the framework of the Policy Element by identifying the **needs** of Florida’s rail system and establishing **priorities** for the investment of state funds using the goals, objectives, and strategies of the Policy Element as guidance. The Investment Element presents detailed information on the future needs of Florida’s rail system and sets forth strategic priorities to meet those needs.

Through the summer and fall of 2009, stakeholders from around the state worked to develop a statewide inventory of rail needs and projects recommended for priority consideration in the development of the 2010 Florida Rail System Plan Investment Element. Chapter 1 of this plan includes an **Introduction** to the 2010 Florida Rail System Plan Investment Element and its relation to other statewide planning initiatives and Federal rail plan requirements.

Chapter 2, **Current Freight Rail System and Services in Florida**, provides an inventory of the operating and recently abandoned freight rail transportation system and services in the State and an analysis of the role of rail transportation within Florida’s surface transportation system (traffic conditions, safety trends, etc.). The Florida rail system is comprised of 2,786 miles of track routes, which are owned by 15 operating line-haul railroads and terminal or switching companies, as well as 81 miles owned by the State of Florida. In 2008, Florida’s railroads carried nearly 1.6 million carloads and approximately 83 million tons of freight. During that year, railroads handled freight equivalent to roughly 5 million heavy trucks.¹ In 2007, Florida’s freight railroads paid \$364 million in wages – a 3.4 percent net increase from year 2006 receipts – to more than 5,600 workers.²

Chapter 3, **Passenger Rail Services and Initiatives in Florida**, describes the State’s passenger rail system and includes a performance evaluation of passenger rail services operating in Florida, including possible improvements in those services and a description of the strategies to achieve those improvements. By 2035 estimates suggest that more than 25 million people will call Florida home, representing a 56 percent population increase between 2000 and 2035. Many urban and interregional highway corridors currently are or are expected to be heavily congested during peak periods by 2025, even after planned capacity improvements are made. Likewise, more than 30 percent of the State’s airports are projected to be operating at more than 80 percent of capacity, the point at which additional capacity should be under construction. The intercity travel market is estimated to grow from just over 100 million trips in 2006 to nearly 200 million trips by 2020 and 320 million trips by 2040.

Chapter 4, **Rail Needs**, identifies rail infrastructure issues within the State that reflect consultation with relevant stakeholders. This Chapter includes an inventory of rail needs, including capital investments for track upgrades, new facilities, capacity expansion, safety improvements, and industrial access. The Chapter also reviews major passenger and

¹ Based on an average payload factor of 17 tons per truck.

² The total wage receipts do not include fringe benefits.

freight intermodal rail connection and facility needs within Florida, including at seaports. The 2010 Florida Rail Needs Assessment was developed based on input from a variety of stakeholders, including the various modal offices at FDOT, the FDOT district offices, freight and passenger railroads, metropolitan planning organizations, counties, regional planning organizations, ports, advocacy and interest groups, as well as private citizens.

The needs assessment identifies a total of 235 near-, medium-, medium-to-long-, and long-term capital improvement projects and other initiatives. The total cost for the projects *where cost estimates* are available is \$50.6 billion.³ This includes 56 passenger-related projects estimated at \$47.4 billion, including \$13.7 billion for high-speed rail improvements, and 139 freight-specific projects valued at approximately \$3.2 billion for a variety of freight capacity improvements, including investments in new lines, bridge maintenance, track maintenance, line expansion, and improved access to/from key hubs and rail corridors, passing sidings, etc. This constitutes a significant departure from the more recent rail needs estimates identified in the 2006 Florida Rail Plan (\$1.16 billion). However, unlike the preceding rail plan, the 2010 Florida Rail System Plan includes a more comprehensive assessment of passenger service needs as well as longer-term needs for both freight and passenger rail.⁴

New passenger rail service (e.g., right-of-way purchase and track construction for new passenger rail lines, improvements to freight rail corridors to allow for addition of passenger service) accounts for the largest portion of needs – over \$46 billion accounting for almost 93 percent of the total. Requests for freight rail grade separations came in a distant second place – requests amounted to \$1.2 billion or 2.5 percent of the total – followed by \$842 million (1.7 percent) for capacity upgrades to handle existing and growing freight demand. The remaining categories accounted for a combined \$1.8 billion, representing the remaining 3.6 percent of requests.

Chapter 5, **Rail Needs Prioritization**, describes the approach for evaluating rail needs projects by goal and objective area using a combination of qualitative and quantitative indicators. To leverage limited available funding and maximize the potential benefits associated with future rail investments, FDOT evaluated the rail needs presented in Chapter 4 using multiple criteria and assigned each need a project priority classification based on its readiness for implementation, coordination with other plans and projects, and potential regional and/or statewide impact. FDOT will use this analysis and priority classification to guide its future investments and other decisions regarding freight and passenger rail projects.

With the expansion of the needs assessment for the 2010 Florida Rail System Plan update to include passenger rail projects as well as projects identified by a broader range of stakeholders, FDOT was required to develop a new approach to assess and prioritize potential rail investments. The rail needs prioritization methodology was developed,

³ Costs are estimated in Year 2009 dollars.

⁴ Near-term (1-5 years), Mid-term (6-10 years), Mid-to-long (11-20 years), Long-term (20+ years).

tested, and refined through multiple meetings with FDOT and other stakeholders. The selected prioritization criteria reflect the rail plan goals as well as current priorities for FDOT as it seeks to implement projects in a constrained fiscal environment where project coordination and positioning to take advantage of Federal and other funding sources is vital.

Of the 235 near-, medium-, medium-to-long-, and long-term capital improvement projects and other initiatives identified as rail needs, this prioritization effort identified 22 very high-priority projects estimated at \$4.9 billion and accounting for 9.7 percent of all rail needs.⁵ These projects include \$3.5 billion for high-speed rail connecting Tampa and Orlando; \$615 million for Sunrail commuter rail service between Deland and Poinciana, \$143 million in infrastructure costs to restore Amtrak service on the Florida East Coast Railway, \$245 million for capacity upgrades to CSX facilities, and \$88.3 million to construct a four-lane overpass over Eller Drive at Port Everglades and a bridge over Dora Canal on the Florida Central Railroad. The remainder of rail needs have been classified as High-, Medium-High, Medium-, Medium-Low, or Low-priority projects.⁶

Chapter 6, **Financing Florida's Rail System**, discusses existing as well as potential and new funding opportunities to support investment in rail mobility and connectivity for both residents and freight and rail-dependent businesses. Florida has historically provided public support to privately held railroads when deemed to be in the best interest of the State. Funding support has included the acquisition of rail corridors, intercity passenger and commuter rail services, fixed guideway system development, rehabilitating rail facilities, improving rail-highway grade crossings, and increasing access to intermodal facilities. Today, state funds for rail projects are channeled through the FDOT Work Program. Half of these funds are received from traditional sources, including fuel tax receipts, vehicle registration, aviation, and rental car fees that are deposited into the State Transportation Trust Fund (STTF). Federal contributions – primarily from motor fuel taxes deposited in the Federal Highway Trust Fund – typically account for 15 to 20 percent of FDOT's Work Program funds. However, due to the additional \$1.37 billion in one-time Federal stimulus funding made available through ARRA, Federal-aid constitutes 36 percent of the FY 2010 to FY 2014 Work Plan. Additional sources include tolls and turnpike revenue (10 percent); right-of-way, fixed-guideway, and SIB bonds (4 percent); and local and other funds (3 percent). The anticipated five-year total funding for all rail projects in the State for the five-year FDOT Work Program from FY 2010-2014 is \$1.82 billion, or approximately 6 percent of the total \$36.21 billion Work Program.

⁵ It should be noted that a significant portion of the \$4.9 billion in very-high priority needs are currently scheduled for construction in the Department's Work Program.

⁶ It should be noted that these priority designations only reflect a perspective on potential state participation in rail projects. Various stakeholders may have higher or lower priorities for these projects that they will consider in determining their participation. Further, some projects ranked as lower priorities may increase in state priority as specific project information is refined or as other funds become available.

The 2010 Florida Rail System Plan Investment Element builds upon the goals, policies, and strategies of the Policy Element and presents an inventory of the State's existing rail system and current and future rail needs. Based on the recommendations of the Florida Rail Stakeholder Advisory Committee and recent developments in Federal rail policy, the Investment Element outlines priority investment areas for the State and provides a framework to guide future investments that will enhance rail service and provide a variety of benefits for Florida residents and businesses.