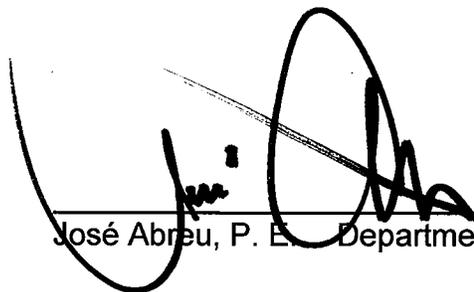




Miami-Dade Aviation Department Business Plan

Fiscal Years: 2012 and 2013
(10/1/011 through 9/30/13)

Approved by:



José Abreu, P. E. Department Director



Carlos A. Gimenez, Mayor

Plan Date: December 2011

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EXECUTIVE SUMMARY

The Miami-Dade Aviation Department (MDAD or the Aviation Department) operates the Miami-Dade County Airport System (the Airport System), with governance and policy guidance from the County Mayor, and the Board of County Commissioners. MDAD is an enterprise fund of Miami-Dade County, operating the Miami-Dade County Airport System as a financially self-sufficient entity without property tax support from the County's property owners.

The Airport System consists of Miami International Airport (the Airport or MIA) and four general aviation and training airports: Opa-locka Executive Airport; Kendall-Tamiami Executive Airport; Homestead General Aviation Airport; and Dade-Collier Training and Transition Airport. The Airport System is considered one of the top economic engines of Miami-Dade County and South Florida. More than 36,000 people are employed in the Miami-Dade County Airport System, of which 1,200 are County employees. Overall, passenger and air cargo activity at the Airport System directly and indirectly generated 294,850 jobs in the region that earned over \$28 billion in direct, induced and indirect personal income. Additionally, based on the most current Economic Impact Study, the Airport System contributed \$26.7 billion in revenue to South Florida businesses, as well as \$1 million in state and local taxes and \$655 million of Federal aviation-specific taxes.

The airport industry, like the aviation industry as a whole, has faced turbulent times. Post -9/11 airport security regulations continue to evolve and directly affect airport operations and costs. The growth of low-cost carriers (LCC) and other changes in airline business models also affected airport operations and costs. The growth of cruise destinations, the struggling U.S. economy, and record-high fuel prices have provided a new paradigm for airport management. The following paragraphs highlight key facts about the airports within the Airport System.

Miami International Airport (MIA)

MIA's horseshoe-shaped terminal is located on the east side of the Airport property between the parallel east-west runways. The Airport has six concourses extending from the outside of the horseshoe, including an international satellite concourse and two commuter terminals. The terminal building complex also includes a hotel, and six parking structures. Originally constructed in the late 1950s, the terminal has grown to over seven million square feet. A \$6.4 billion Capital Improvement Program (CIP), encompassing all aspects of airport operations, from the terminal and roadways to the cargo facilities and the airfield, is approaching completion. MIA is the primary trans-shipment point between the Americas, the Caribbean and Europe. As of November 2011, MIA is served by 96 scheduled and charter airlines with routes to nearly 134 cities on four continents, and provides more flights to Latin America and the Caribbean than any other U.S. airport. The Airport ranks number one in the U.S. for international freight and second for international passenger traffic.

MIA's yearly trade activity represents approximately 96 percent of the dollar value of the entire state of Florida's air trade figure, and 41% percent of the State's total trade activity, which includes both air and sea trade. At the hemispheric level, MIA handles 81 percent of all air export trade between the United States and Latin America and the Caribbean, while 83 percent of all air imports from the same region into the United States arrive through the Airport. Combined with the area's cultural, business, and social ties to Latin America, MIA is the predominant gateway airport for U.S.-South American passenger traffic with a 47 percent



market share, U.S.-Central American traffic with a 30 percent share, and U.S.-Caribbean passenger traffic market with a 29 percent share.

MIA's location at the southeast tip of the U.S. gives it closer proximity to the Caribbean, Central America and South America than any other major U.S. airport and makes it a natural connecting point. The Airport's geographic position has been a significant factor in making MIA a major nexus for passengers traveling between Europe and Latin America as well.

Opa-locka Executive Airport (OPF)

The County obtained the airfield from the United States Government in 1961 when its name changed to Opa-locka Executive Airport. It functions as a major general aviation facility, providing support to MIA. OPF is located approximately 12 miles northwest of downtown Miami and seven miles north of MIA. The 1,810-acre facility has an Air Traffic Control Tower operated by RVA Corp. under the FAA Contract Program from 7:00 a.m. to 9:00 p.m. daily; a U.S. Customs facility operated from 9:00 a.m. to 9:00 p.m.; and a County maintained and operated Airport Rescue and Fire-fighting Facility (ARFF).

Opa-locka West Airport

In the late 1960s Opa-locka Airport was one of the busiest civilian airports in the world as the flight training business flourished. Construction began on Opa-locka West Airport in 1969 to relieve the congestion at OPF; it opened for business in April of 1970. As the demand for flight training declined steadily into the twenty-first century, the need for a reliever airport for OPF no longer existed and Opa-locka West was decommissioned. The property is in the process of being converted to limestone rock mining, which will generate needed non-aviation revenue for the System.

Kendall-Tamiami Executive Airport (TMB)

In 1967, the new Tamiami Airport, located south of Kendall Drive and west of the Florida Turnpike Extension, replaced the old Tamiami Airport located on Tamiami Trail (U.S. 41). During 1989, the name was changed to Kendall-Tamiami Executive Airport. It is the second primary general aviation facility servicing MIA because of its close proximity to the Miami metropolitan area. The airport has an Air Traffic Control Tower operated by the FAA from 7:00 a.m. to 9:00 p.m.; a U.S. Customs facility with winter hours from 10:00 a.m. to 6:00 p.m. and from 11:00 a.m. to 7:00 p.m. in the summer. A FAA-operated Miami International Automated Flight Service Station provides various flight information services to pilots operating in the South Florida and Caribbean areas.

Homestead General Aviation Airport (X51)

Homestead General Aviation Airport, constructed in the 1960s, is located in the southern part of Miami-Dade County, approximately three miles northwest of the City of Homestead. The airport serves the general aviation needs of this rural portion of the County.

Training and Transition Airport (TNT)

The Training and Transition Airport is located on the border of Miami-Dade and Collier counties, approximately 35 miles from MIA. Opened in 1970, it is an air carrier training/reliever airport for MIA.



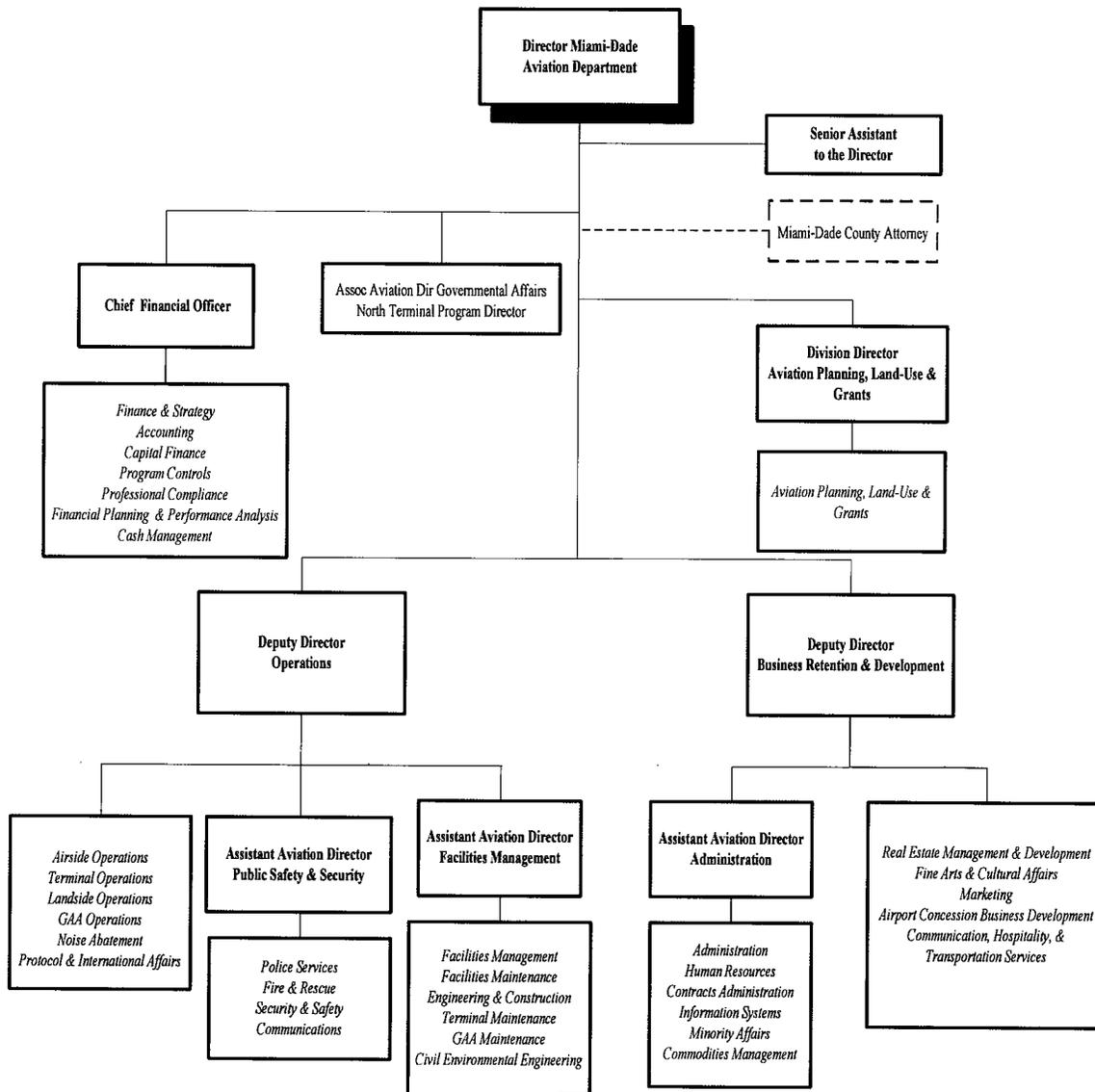
AVIATION DEPARTMENT OVERVIEW

DEPARTMENTAL PURPOSE/MISSION

VISION—*To be a world class airport providing the highest level of customer service*

MISSION—*To cost effectively operate airport facilities that are safe, efficient, customer friendly, environmentally responsible and contribute to the economic growth of the community*

Table of Organization
Miami-Dade Aviation Department
Table of Organization



Strategic Alignment Summary

The following are the Strategic Plan goals and objectives that are supported by the Aviation Department's most important activities.

- Facilitate connections between transportation modes (TP1-6)
- Ensure security at airports, seaport and on public transit (TP2-4)
- Provide easy access to transportation information (TP2-5)
- Ensure excellent customer service for passengers (TP2-6)
- Continually modernize Port of Miami and airports (TP3-3)
- Enhance customer services, convenience and security at every level of contact with the ports (TP6-2)
- Expand domestic and international travel and tourism (ED2)
- Improve customer service at airports, hotels and other service providers that support travel and tourism (ED2-2)
- Expand international trade and commerce (ED3)
- Provide sound financial and risk management (GG4-1)
- Effectively allocate and utilize resources to meet current and future operating and capital needs (GG4-2)
- Provide well maintained, accessible facilities and assets (GG5-2)

Our Customer

Our customers and their most important needs

Our customers include but are not limited to airlines, passengers, cargo handlers, federal agencies, concessionaires, fixed base operators (FBO), vendors, service operators, developers, and employees. Their needs vary greatly, and must be balanced to make our Airport System effective, efficient, economical, and attractive to its diverse constituency. MIA staff, at every level, is dedicated to ensuring the safe and efficient movement of people, aircraft, vehicles, and goods through our airports.

MDAD seeks to provide and continually improve a positive environment for all its customers. The Aviation Department attempts to continuously deliver the best possible customer service to its numerous users and encourages entities operating at its airports to have the same high goals. To this end, it has developed a number of customer service-related initiatives and efforts, such as welcoming officials to MIA, and greeting them when consulates are not on-site to meet their guests.

Preparing for the future needs of our customers is equally important. The investment in our facilities at MIA, the general aviation and reliever airports through the Capital Improvement Program (CIP) and the renewal and replacement program builds for the future. The CIP, now nearly complete, includes projects that enhance safety and security, improve customer service, meet higher environmental standards and return economic value to the wider community. This program has also strategically positioned MIA for maintaining its role as a major international gateway. Systematically planned



renovation of our older facilities continues to be necessary to extend their useful lives and carry out projects deferred in prior years due to cost constraints.

How customer feedback is collected and how satisfaction is measured.

One of the consistent indicators of successful customer service is the annual passenger survey (conducted since May 2008 by Unison Consulting, Inc.), which has consistently shown high levels of satisfaction with various aspects of MIA among international passengers, departing passengers (with MIA as their point of origin) and meeter/greeters (local residents picking up travelers). The survey also provides management with valuable demographic and economic information and opportunities for continuous improvement.

The following are major customer or industry trends that can affect operations:

- Volatility of jet fuel prices for passenger and cargo airlines.
- Rapid evolution of technologies and processes for safety and security.
- Perception of aviation risk by the traveling public.
- Growth (or lack of) in Latin America countries' economies.
- Replacement of aging navigational systems with newer technologies and operational procedures.
- Price pressure on airlines to provide low cost services.
- Effect of Public-Private Partnerships between airports and private industry on the airport industry.
- Trend toward the airline industry's usage of larger aircraft, which may require expensive gate reconfiguration.
- Ability of the airline industry to cope with the economic downturn and rising costs.
- Strive to achieve a competitive price structure as compared with other airports, especially when using the cost per enplaned passenger metric.
- Enhance non-aviation revenues.
- Cooperation with federal agencies to develop solutions to facilitate friendly, faster and smoother passenger processing, particularly for international passengers.
- Implement unfunded federal security mandates.

KEY ISSUES

AMR, American Airlines' (AA) parent company's Chapter 11 bankruptcy filing in November 2011 has raised concerns throughout the aviation and financial services industries, particularly for hub airports in which AA is the predominant carrier. More than 65% of MIA's traffic comes from American. The Airport, however, is far less vulnerable to AA service cutbacks because Latin America is one of AA's most profitable regions, most of which is served by AA from MIA. In calendar year 2011, MIA accounted for 62% of AA's scheduled departing seats to Latin American, the Caribbean and Mexico. If, however, AA were to downsize its operations at MIA, history from

previous airline bankruptcies has shown that other domestic and foreign flag carriers would fill the void, especially to Latin America and the Caribbean, because there is passenger demand that needs to be met.

In addition, the Airport's Airline Use Agreement is in place to ensure MIA's near and long-term financial stability. Unlike most airports, MIA's airline rates and charges are activity based, meaning that airlines only pay for the activities and services they use. Since there are no preferential terminal space rights given to an airline, and no long-term leases, there is very little to be negotiated as part of bankruptcy proceedings.

The North Terminal Program (NTD) is significantly complete with major terminal areas open for operations from old Concourses A, B, and C to the new D and the Rental Car Facility. All gates from D1 to D60, with the exception of three gates (D26, D27, and D28), are also operational. The only remaining area to be completed is the Federal Inspection Services (FIS) area.

The primary remaining North Terminal issue is the acceptance of Baggage Handling System (BHS) Phases 1 & 2 and transition of operations. In April 2011, North Terminal Development (NTD) Program Management and AA attempted to transition to the new in-line system. The BHS did not perform as necessary for proper, smooth and sustainable operations in the busy hub terminal. A contributing factor was that the volume of bags anticipated when the project was designed more than 10 years ago was significantly less than what AA currently handles at MIA. In the past two years, AA has grown its MIA hub operations from about 200 flights a day to more than 300 flights daily.

This delay has had a detrimental effect on multiple NTD projects and contractors; the other projects affected by the BHS delay include a portion of the FIS work, BC apron, Passenger Loading Bridges (PLBs) and Preconditioned Air (PCA/400Hz), all of which cannot be completed until the old legacy system is demolished. Additionally, the opening of the three remaining gates is dependent on this work.

If the BHS system is not deemed acceptable for transition of operations, several challenges will arise:

- To attain maximum functionality of the partially complete FIS by implementing different options.
- To reduce scope and close out all open contracts in a manner to minimize risk to the County.
- To complete the remaining BHS once AA has completed the system improvements.
- To complete the remaining FIS, BC apron, PLB and PCA/400Hz work once the BHS is complete.

Aviation Planning, Land-Use and Grants

In late 2005, the need for a strategic airport master plan study, focusing primarily on MIA but also considering the complimenting and reliever roles of the County's general aviation airport was identified. In April 2009, Aviation Planning, Land-Use and Grants Division initiated the new Strategic Master Plan (SMP) Study, focusing on identifying demand growth and assessing airport-system facility and infrastructure needs for the 2015-2050 planning horizon. The study is a phased approach, with expected completion in late calendar year 2012. The SMP 2015-2050 will focus on the following:

- Developing a strategic plan for MIA and the County's general aviation system of airports (i.e., the Airport System), focusing on airport roles and positioning to capture existing or anticipated opportunities in the market.
 - Outline long-term capital investment strategies
 - Consider multiple development scenarios
- Assessing and identifying solutions to the needs for MIA from 2015 through 2050, while also providing guidance to address the immediate needs within the 2010-2014 timeframe.
- Positioning the Airport System to serve demand growth, continued enhancements in customer service and airline service and industry trends.
- Balancing capital expenditures for asset expansion and modernization needs within the Aviation Department's financial framework and performance targets.
- Comprehensively evaluating aviation facilities:
 - Airfield
 - Terminals
 - Vehicular parking & roadways
 - Tenant facilities (cargo, aircraft maintenance, etc.)
 - Support facilities (airport administration, fueling, fire rescue, etc.)

Airside Operations

Ensuring the safe day-to-day operations of MIA's airfield and Part 139 Compliance with Federal Aviation Administration (FAA) regulations involves many complex and vital tasks including ramp access, aircraft gate and apron control, airside motor vehicle decal program, construction, cargo, aircraft parking, passenger loading bridges, Flight Information Display System (FIDS) and the security and safety of aircraft, motor vehicles and pedestrian traffic on the Aircraft Operations Area (AOA). Key issues include:

- Extension of Taxiway K at MIA: Currently under construction as part of the Centurion Development Project, this taxiway segment will allow efficient flow of aircraft to the Centurion building parking area. FAA End Around Taxiway (EAT) requirements, however, may inhibit aircraft flow to and from the Centurion Building. Possible departure zone penetrations may inhibit aircraft flow to and from the Centurion Building.

- The pace of demolition of derelict aircraft at Opa-locka Executive Airport: it is slower than anticipated.

Landside Operations

Key issues affecting the Aviation Department's Landside Operations Division include:

- Opening of the Concourse D FIS: shifting FIS activity from the current Concourse E FIS to Concourse D will require repositioning of Landside staff and ground transportation kiosks to meet demand shift and promote better customer service.
- Expansion of Central Boulevard: this project affects traffic flow during its construction phase. When completed, MIA will have reconfigured roadways, additional traffic lanes on Central Boulevard and will also have service roads to separate public from commercial vehicular traffic.
- Taxicab demand: MIA has seen taxicab demand increase in keeping with passenger growth. Taxicab demand grew by 10.5% in calendar year 2010 over 2009. In the first 9 months of calendar year 2011, we experienced a 7.6% demand increase over the first 9 months of 2010. This represents increased taxicab revenue (passengers pay MDAD \$2.00 per MIA originating trip). This also highlights the need for taxicab credit card acceptance given the number of MIA passengers using taxicabs. In 2011 the daily average of dispatched taxicabs was 3,844.
- Employee parking: employee parking demand continues to increase as employee levels increase, resulting in the need for additional parking spaces and increased shuttle services.

Facilities Management

The Facilities Management Division is made up of more than 40 different working units or shops, who strive to:

- excel in preventive maintenance and
- enhance the Airport System's facilities through improvements in customer service and responsiveness to our tenants, users and the traveling public.

Facilities Management also ensures that facilities at the Airport are kept operationally reliable at all times, support the environmental, civil and aviation fuel needs for the Aviation Department, monitor the quantity and quality of the domestic water, sewage and storm water systems and perform audits of tenants for environmental compliance. The Division serves as a support division of the Aviation Department with the primary function of maintaining all airport systems and facilities in optimum working condition, which will be accomplished by providing good customer service that is timely and efficient through the use of improved technologies, staff development, accountability, improved processes and the use of a zoned maintenance concept.

Public Safety, Security and Communications

Public Safety, Security and Communications Division is responsible for directing the day-to-day security operations at MIA and the County's four general aviation airports. It serves as the primary overseer of TSA compliance and enforcement actions and is responsible for implementing any new security mandates that are issued. The Division maintains a safe and secure environment in coordination with Transportation Security Administration (TSA), Customs and Border Protection (CBP), the Federal Bureau of Investigation (FBI), Immigration and Customs Enforcement (ICE), Federal Air Marshals (FAMs), the Department of Homeland Security (DHS), the Miami-Dade Police Department, Fire Department and U.S. Attorney's office.

The Division is a 24-hour operation where security responsibilities now include five security components; TSA Compliance, Credentialing Section, Airfield and Cargo Security and oversight of Terminal Security.

Business Retention and Development

The mission of Business Retention and Development (BR&D) Division is to grow revenue by delivering excellent customer service to existing passengers, airlines and tenants, and aggressively pursuing new customers and business opportunities to enhance non-aeronautical revenues. To this end, its key objectives are:

- Increase rental revenues generated from tenants at MIA's terminal building, non-terminal buildings at MIA, and tenants at the County's general aviation airports.
- Grow gross revenues from Commercial Operations sales including rental cars, management agreements, terminal concessions and public parking.
- Increase passenger and cargo traffic.
- Execute Public Private Investment Partnership (PPIP) agreements to bring in incremental revenues. In 2007, the Aviation Department initiated a multi-phased PPIP program in an effort to address unfunded capital needs not included in the CIP and generate additional revenues. Through the PPIP program, the Aviation Department has looked for qualified investors/developers to finance, design, construct, renovate, manage and/or operate projects on undeveloped and/or underutilized land and in facilities in certain designated investment areas within the boundaries of the Aviation Department's airports.
- Make the Airport more competitive by retaining and stimulating the utilization of the terminal facility to enrich the passenger's experience through art and culture

PRIORITY INITIATIVES

As a part of developing the Aviation Department's Business Plan, MDAD has identified the following key initiatives that will be of particular focus over the next two years. These initiatives are a subset of those used to regularly monitor and report performance.

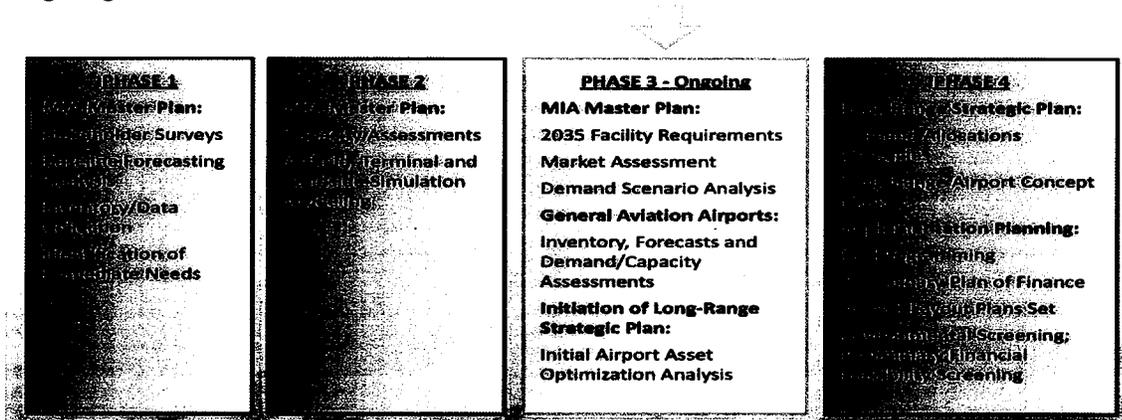
North Terminal Baggage Handling System (BHS):

Additional tests of the BHS were successfully executed to further ensure system functionality and reliability and to determine if the system will be able to support the increased flight load. The system is pending a decision to continue the testing with live bags. Meanwhile, the plan to delink the terminal building work from BHS to mitigate and minimize the impact on the completion of FIS areas is being implemented. As a result, finish-out work in the FIS area has been phased, accelerated and is progressing.

The FIS will open under either scenario (using the old legacy system until the new In-Line system is upgraded or under the new In-Line system). Various options are being considered and evaluated to maximize the functionality of the partial FIS. The preferred option, once approved by the County and other local and Federal authorities, who have jurisdiction, will be implemented. All active contracts (both open and completed) are also being evaluated for potential de-scope and/or close-out to minimize the risk to the County.

Strategic Master Plan (SMP):

The Aviation Department's comprehensive Strategic Master Plan (SMP) includes four phases as graphically depicted below. Phases 1 and 2 are complete. Portions of Phase 3, representing the work program initiated in calendar year 2011 are presently ongoing.



Ongoing activities include:

- Establishment of MIA facility requirements
- Evaluation of public parking facilities

- Identification of long term strategic options and development scenarios.
- Inventory, demand forecasting, and capacity assessments for the general aviation airports

The final phase (Phase 4) of the Strategic Master Plan (SMP) is expected to be completed in 2012 and will include:

- Long-range strategic and airport concept plans:
- Strategic positioning and demand allocations strategies
- Implementation planning
- CIP programming
- Preliminary plan of finance
- Airport layout plans set
- Environmental screening analyses

Finance and Strategy

- ERP Financial Systems Upgrade: in collaboration with MDAD's Information Systems Division, Water & Sewer Department and ITD, upgrade the existing ERP Financials software to version 9.1, which is a major upgrade, in order to bring the financial systems software to a current version that can be supported by Oracle Corporation, the manufacturer of the software. In addition, the upgrade will allow the Aviation Department to take advantage of enhancements made to the software, as well as deploy new features and functionality.
- MIA-Pay—this initiative will allow MDAD customers to pay their invoices online using a credit card or electronic check. When using a credit card, the maximum payment allowed will be \$1,000. Payments made via electronic checks will not have a dollar limit. This is a self-serve function, so users will be able to use it without the need to interact with the Accounts Receivables staff. Additionally, the system will provide a daily file with payments made that can be automatically posted to the ERP financial system.
- Conduct one bond refinancing if market conditions are favorable.

Business Plan Cycle (BPC)

To achieve its goals, MDAD will adopt an ongoing assessment process of the business plan to regularly review business priorities and the progress of key targets stated in the plan. Given the importance of fiscal responsibility, customer service and satisfaction, and growth and revenue opportunities, implementation of the BPC will ensure a careful review and progress of current business practices.

Public Safety, Security and Communications

Initiatives for this period include conducting behavioral detection training classes each month, conducting monthly covert security challenges by Airfield and Cargo Security,

random background checks of employees to be conducted by MDPD, continuing to track efficient delivery of police services by responding to calls within established time frames at MIA to include routine and emergency response times, K9 response, and maintaining a high standard of employee screening program through the Security Division at MIA.

Facilities Management

- Continue to implement terminal wide energy conservation measures.
- Ensure the health and safety of passengers and tenants by complying with all federal, state and local rules, regulations, statutes and codes applicable to the construction, renovation and maintenance of facilities
- Minimize maintenance expenses while optimizing value received on maintenance investments
- Plan maintenance activities and schedule projects necessary to arrest deterioration and/or restore facilities
- Develop preventive maintenance programs that extend the serviceable life of equipment and systems and reduce breakdowns and repairs
- Process professional services invoices within 10 calendar days
- Meet approved budget targets
- Minimize overtime expenditures
- Maintain an equipment inventory and preventive maintenance system that will provide an annual analysis, recommendations for expansion or reduction, and proposed level of funding for preventive maintenance service

The installation and implementation of the work order system this coming year will provide a measure to align man power resources with available commodities in the Division's inventory system. This will provide quick and precise response to customer needs in emergency and non-emergency modes of operations.

Airside

- *MIA Rehabilitation of Runway 12-30*—mill and pave runway surface, install new lighting, add surface mounted runway guard lights (RGLs), add fillet to taxiway S turnoff, new Runway End Lights (REL) and re-painting of surface markings.
- *Extension of Taxiway K*—constructed as part of the Centurion Development Project, this taxiway segment may allow for efficient flow of aircraft to the Centurion building parking area.
- *Development and Implementation of the Safety Management System (SMS)*—the rollout of this Federal Regulation has been delayed but is inevitable. The goal of SMS is to instill a proactive, transparent, non punitive safety culture at FAR 139 Certificated Airports. While the regulation is not final, software and consultant expenditure is expected.



Landside

- Implement a New Automated Vehicle Identification (AVI) system, like the one installed at the Port of Miami, to protect and increase ground transportation revenue.
- Install an automatic toll collection system and remove cashiers at the taxi lot. Taxicab drivers would insert the \$2.00 toll in the machine instead of having a cashier collecting tolls.
- Identify and create additional employee parking spaces to meet increased demand.

Terminal Operations

- Maintain overall customer service ratings in the three segments measured - departing passengers, international arrivals and Meeters/Greeters.
- Continue the "Miami Begins @ MIA" training program, which requires that all 35,000 airport workers, regardless of experience, position or title, attend customer service classes through Miami-Dade College's Center for Service Excellence (FY12 and FY13 target is 6,000 employees per year).

Safety and Security

- Respond to security door alarms in an average of 10 minutes from time of radio dispatch by Operations Control Room.
- Clear unattended bags in an average of 13 minutes.
- Conduct a minimum of 40 ID badge challenges per month.

Protocol

- Reevaluate priorities and update the MIA Protocol Courtesies of Port Manual to describe new programs and enhanced rules and regulations that will allow the Aviation Department to adequately respond to the demands.
- Increase membership at the MIA Consular Lounge.

BR&D

- Accelerate the renovation and repair work of vacant spaces to turn them into leasable spaces to meet their business plan objectives and goals in increasing rental revenue by turning their non-performing assets to performing assets at MIA's non-terminal buildings as well as at the general aviation airports.
- Develop air service programs including an amendment to the current air service incentive program that offers an unprecedentedly lucrative (alluring) incentive package to airlines that develop new or incremental air service to the BRICS (Brasil, Russia, India, China and South Africa) countries.



- Execute agreements on Public Private Investment Partnership (PPIP) developments valued at not less than \$600 millions in construction and for the following year the same thing except the amount should be not less than \$50 million.

FUTURE OUTLOOK

The Aviation Department's Traffic Engineers forecast the enplanement growth factors for FY 2012 as 2.7%; for FY 2013 as 2.4% and FY 2014 as 2.2%. These figures indicate that although enplaned passenger traffic will continue to grow, it will be at a lower rate. The County's Airport System must remain competitive with other airports in terms of the services offered and particularly, the costs of those services. The Aviation Department will thus continue its "out-of-the-box" thinking in its efforts to increase non-aeronautical revenues and decrease costs for the airlines.

By 2012, it will become easier to get to and from the Airport, with the schedule opening in spring 2012 of the Airport Link, a Metro-Rail extension from the Earlington Heights station to the Miami Intermodal Center. This new link will allow Airport users to take the MIA Mover directly to the Airport terminal.

In regard to the North Terminal Development Program, whichever of the possible two outcomes occurs, the North Terminal (NT) with its facility, amenities, systems and conveniences will still have a great outlook in the future. This portion of the terminal has already received a number of industry awards and honors and puts Miami International Airport on the world stage. The NT accommodates approximately 69% of the Airport traffic, which is only expected to increase in the future.

With the build out of MIA's airfield there has been a steady loss in hardstand parking for aircraft that need to park remotely from the terminal. The lack of hard stand parking may lessen aircraft parking revenue and prevent the optimal utilization of aircraft parking at the terminal gates.

Beyond the Centurion cargo apron project, cargo aircraft parking numbers will remain stagnant, while the projection for aircraft footprint grows larger. MIA may realize a decline in cargo parking space due to increased aircraft size and increased development of areas surrounding the airfield.

Over the next 3-5 years, the Public Safety, Security and Communications at MIA will focus on overall enhanced training for Security Operations Supervisors, Senior Agents and Agents. In addition, the Division will continue to increase security and leverage efficiencies by coordinating training for the Airside, Landside and Terminal Operations Divisions in enhanced behavioral detection skills. The Division will also work toward the development of an upgraded Operations Command Center, expand the CCTV coverage airport-wide, improve employee screening, and conduct monthly MIA Security Partners meetings as well as quarterly Cargo Security meetings to harden the Aviation Department's security posture.

Other future issues include;

- Address possible changes in Federal security mandates
- Develop MIA Business Ventures program to increase revenues from consulting services by BR&D
- Execute an agreement in the next 3-5 years for Rock Mining at Opa-locka West to generate approximately \$20 million annually over 20 years
- Enhance non-terminal revenues
- Develop air service incentive programs to increase passenger and cargo flows, especially from the BRICS countries
- Explore non-aeronautical revenues and out of the box ideas
- Create new business opportunities and foster relationships with terminal concessions to provide customers with superior airport concessions and services

