Welcome to the Border Trade Advisory Committee Meeting

- The meeting will start at 8:00 a.m. CST
- Please turn off your video and mute your phones
- We will be using the Mentimeter polling application during this meeting
  - You may find it helpful to load www.menti.com into the browser of your device now. The meeting code is: XX XX XX

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via text (512-975-5604) or in the chat box
Texas-Mexico Border Transportation Master Plan

Border Trade Advisory Committee
Agenda

1. Introduction/Opening Remarks
2. Activities since Previous Meeting (June 2020)
3. Current and Future Needs Assessment (Chapter 5)
4. Future Forecasts for the Border Region (Chapter 6)
5. Economic Importance of the Border (Chapter 7)
6. Identification and Evaluation of Strategies to Address Current and Future Needs (Chapter 8)
7. Next Steps and Closing Remarks
Recap of Previous BTAC Meeting (June 2020)

- Stakeholder outreach
  - BTAC & BNRSC Round 5

- Received final input on:
  - Chapter 1: Introduction
  - Chapter 2: Goals, Objectives and Institutions
  - Chapter 4: Binational Multimodal Transportation Network Designation

- Reviewed:
  - Chapter 3: Texas-Mexico Border: Past and Present
  - Chapter 6: Future Forecasts for the Border Region
  - Chapter 7: Economic Importance of the Border
Current and Future Needs Assessment

Chapter 5
## Current and Future Needs Assessment Overview

### Chapter Purpose
- Summarizes current and future issues and needs of the binational and multimodal transportation system
- Sets the stage for identifying strategies and solutions

### Key Messages
- Continued growth of population, trade, and travel demand has outpaced investments in borderwide infrastructure
- Policy, program, and project needs for cross-cutting themes that span across BTMP goal areas:
  - binational coordination, collaboration, and cooperation
  - integration of new technologies
  - data collection, harmonization, sharing, and analysis
  - system monitoring

### Preliminary Findings
- Highest system performance needs are concentrated within the last mile of the border—congestion, safety, and infrastructure asset conditions
- Economic potential of the border is not fully realized due to inefficiencies in border crossings and multimodal transportation system planning, investments, management, and operations
- Demand on binational border crossings and multimodal transportation network outpaces funding availability for infrastructure investments
Cross-Cutting Issues and Needs

- Binational and Multimodal Coordination, Collaboration, and Cooperation
- Integration of New Technologies
- Data Collection, Harmonization, Sharing and Analysis
- System Monitoring
Binational and Multimodal Coordination, Collaboration, and Cooperation (5.1.1)

- Opportunity to improve comprehensive binational coordination among existing institutional frameworks to better plan, invest, manage, and operate border crossings and multimodal transportation network
Integration of New Technologies (5.1.2)

- Need for more consistent planning to integrate and deploy new technologies
  - Need for standardized systems, processes, capabilities, data collection
  - Opportunity to streamline permitting, inspection, and documentation procedures
  - Potential for broader use of non-invasive screening technology
  - Improvements in facilitating shared mobility modes, V2I communication, and alternative fuels
  - Strategies to decrease long waits at at-grade crossings due to precision scheduled railroading
Data Collection, Harmonization, Sharing and Analysis (5.1.3)

- Need for comprehensive borderwide data collection strategy including comprehensive borderwide total crossing time data, accessible southbound volumes data by mode.

- Need to improve trade and personal transportation data among binational federal, state, regional, local, and private partners:
  - Limited federal policies in place to share border data between the U.S. and Mexico.
  - Improvements in data harmonization between different partners.
  - Better applications of binational data analysis programs.
System Monitoring (5.1.4)

- Need to develop an institutional framework for system monitoring and gaps in information on system performance for decision-making
  - The vast, complex, and regional variation in transportation infrastructure makes performance monitoring difficult
  - The uniqueness and dynamism of the region makes border-specific performance monitoring important
BTMP Process Goals - Issues and Needs

- Sustainable Funding
- Economic Competitiveness
- Resiliency
- Stewardship
- Customer Service
Issues and Needs by Goal: Sustainable Funding (5.2.1)

- Demand outpaces funding available for infrastructure investments
- Need for consistent funding sources
- Need for data-driven prioritization process to allocate funding

### TxDOT Border District Funding Shortfall (2019)

<table>
<thead>
<tr>
<th>District</th>
<th>Partially Funded Project Shortfall</th>
<th>Unfunded Project Shortfall</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso District</td>
<td>$0.2</td>
<td>$677</td>
</tr>
<tr>
<td>Laredo District</td>
<td>$0.03</td>
<td>$1.1</td>
</tr>
<tr>
<td>Pharr District (RGV)</td>
<td>$0.2</td>
<td>$3.4</td>
</tr>
</tbody>
</table>

### CBP Border Facility Estimated Investment Needs

<table>
<thead>
<tr>
<th>Region</th>
<th>Estimated Investment Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso Region</td>
<td>$13 million</td>
</tr>
<tr>
<td>Laredo Region</td>
<td>$9 million</td>
</tr>
<tr>
<td>RGV Region</td>
<td>$21 million</td>
</tr>
</tbody>
</table>

Transportation Funding Shortfall ($ billions)
Need to reduce inefficiencies to improve the economic potential of the border
- High border wait times and delays
- Improvements in comprehensive U.S. and Mexico policy, program, and project coordination and investment
- Improve efficient connecting infrastructure
- Need to make the system more responsive to potential disruptions
- Opportunities to meet current and future demands and projected growth

U.S.-Mexico Trade
2019 $615 B

Trade processed by the Texas-Mexico Border
2019 $421 B
Issues and Needs by Goal: Resiliency (5.2.3)

- Need for a comprehensive binational framework for systemic processes, procedures, and investments in the case of unforeseen events
- Increased resiliency planning and enhanced network redundancy
- Recent border disruptions include:
  - 2010 Rio Grande Valley flooding
  - 2017 Laredo/Nuevo Laredo tornado
  - Hurricane Harvey (2017)
  - Migrant crisis (2019)
  - COVID-19 (current)
Issues and Needs by Goal: Stewardship (5.2.4)

- Growing transportation demand contributes to environmental and community issues along the border
  - Different U.S. and MX vehicle emission standards and regulations
  - Need for policies to reduce vehicle idling at the border
  - Opportunities to improve the consistency of air quality monitoring
  - High reliance on traditional energy sources and low use of alternative renewable energy uses
  - Improvements in hazardous material policies and disposal sites
Issues and Needs by Goal: Customer Service (5.2.5)

- Need for better mechanisms for binational stakeholder participation in ongoing decision-making on border planning, investments, management, and operations
  - Continued need for language translation services
  - Improved processes to identify, organize, and track customer issues and needs
  - Better procedures to track customer engagement methods
  - Challenges in convening large in-person meetings during COVID-19 pandemic

The BTMP development process brought together an unprecedented 2,400 binational stakeholders to exchange ideas about the border.
BTMP Performance Goals - Issues and Needs

- Mobility and Reliability
- Safety and Security
- Asset Preservation
Mobility and Reliability Needs: Border Crossing Delays (5.3.1)

- Need to address increasing border crossing delays and wait times

**Operational Efficiency Needs**
- More robust and coordinated management
- Need to advance the broad adoption and integration of technologies
- Improved demand management
- Enhanced number of border inspection staff and hours of operation
- Opportunities to develop additional programs for expedited lanes
- Need for standardized systems and streamlined procedures across border crossings

<table>
<thead>
<tr>
<th>Mode</th>
<th>Underutilized</th>
<th>Overutilized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Vehicles</td>
<td>1 Crossing</td>
<td>9 Crossings</td>
</tr>
<tr>
<td>Passenger Vehicles</td>
<td>0 Crossings</td>
<td>17 Crossings</td>
</tr>
<tr>
<td>Bike/ Pedestrians</td>
<td>1 Crossing</td>
<td>7 Crossings</td>
</tr>
</tbody>
</table>
Mobility and Reliability Needs: Border Crossing Delays (5.3.1)

- Need to address increasing border crossing delays and wait times
- **System Capacity Needs**
  - Capacity constraints of existing border and network infrastructure
  - Overutilization of existing border crossings
  - Limited multimodal network capacity
  - Need for comprehensive performance monitoring system for preventable maintenance and continuous improvement
  - Metric-based system to allocate funding

### Border Crossing Volume to System Capacity

<table>
<thead>
<tr>
<th>Mode</th>
<th>Underutilized</th>
<th>Overutilized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Vehicles</td>
<td>4 Crossings</td>
<td>1 Crossing</td>
</tr>
<tr>
<td>Passenger Vehicles</td>
<td>4 Crossings</td>
<td>2 Crossings</td>
</tr>
<tr>
<td>Bike/Pedestrians</td>
<td>3 Crossings</td>
<td>0 Crossings</td>
</tr>
</tbody>
</table>
Mobility and Reliability Needs: Roadway Delays (Congestion) (5.3.2)

Laredo Region - 2018 Congestion

Laredo Region - 2050 Congestion
Mobility and Reliability Needs: Roadway Delays (Congestion) (5.3.2)

- Congestion occurs due to transportation demand exceeding capacity, design issues, passenger/commercial lane conflicts, and lack of mode choices

### Operational Efficiency Needs
- Improvements to outdated transportation systems and traffic control
- Traffic optimization strategies and technology
- On- and off-ramp lengths
- Alternative transportation choices
- Connectivity for OS/OW vehicles

### System Capacity Needs
- Opportunity to update roads to higher standards
- Lane and intersection design issues
- Limited lane capacity on current key roads
- Limited connections between corridors and crossings
- Highway/rail grade separations
- Alternative transportation choices’
- Truck parking capacity and staging
### Multimodal Connectivity Needs

<table>
<thead>
<tr>
<th>Needs</th>
<th>Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improvements to congested intermodal rail facilities on the U.S. side of the border in El Paso/Santa Teresa, Laredo, and Brownsville</td>
<td>Enhancements to limited sidewalk connectivity, and gaps between the bike and pedestrian network and borderwide major destinations</td>
</tr>
<tr>
<td>Limited wayfinding between crossings and border region airports and limited local connectivity between areas surrounding the regional airports</td>
<td>Improvements to frequency of transit service, bus delays, wait times, and lack of transit service connectivity to bike/pedestrian crossings</td>
</tr>
<tr>
<td>Truck network upgrades to higher standards to meet the demands of increasing truck-seaport movements</td>
<td>Continued population growth will result in a higher demand for transit connections</td>
</tr>
</tbody>
</table>
Mobility and Reliability Needs: Multimodal Connectivity (5.3.3)

Seaport Connectivity – ELP Region

Seaport Connectivity – LRD/RGV Regions
Mobility and Reliability Needs: Multimodal Connectivity (5.3.3)

Rail Connectivity - ELP Region

Rail Connectivity – LRD/RGV Regions
Mobility and Reliability Needs: Rail Border Crossings (5.3.4)

- All five freight rail bridges that connect Texas and Mexico are single-tracked.
- This prevents simultaneous two-way operations and creates bottlenecks as trains queue in both directions.

**NORTHBOUND RAILCAR TRENDS:**

- **1996 – 2019:**
  - +748,000 (305%)
  - from 252 thousand to 1 million railcars

- **2019 – 2050:**
  - +1,600,000 (160%)
  - from 1 million to 2.6 million railcars
Mobility and Reliability Needs: Blocked Highway/Rail Crossings (5.3.5)

- Improvements to highway/rail grade crossings are needed in all three border regions.
- A single stopped train can block all highway/rail crossings from the border to two miles north of the border.

**BLOCKED HIGHWAY/RAIL CROSSING NEEDS**

- Locomotives and railcars block at-grade streets in border region urban areas when stopping for inspection and crew change.
- Class I railroads have increased train lengths as part of the paradigm shift to precision scheduled railroading.
Opportunities to reduce safety conflicts which occur in areas where **commercial vehicles and other modes mix**

The **number of incidents close to border crossings is growing** as roads accommodate higher traffic volumes and larger sizes of commercial trucks.

**BORDER CROSSING SAFETY AND SECURITY NEEDS**

- Expand number of border crossings with capability to process hazardous materials
- Improve limited pedestrian and bike infrastructure at border crossings and connecting roads
- Potential to provide separate truck lanes at crossings that process hazardous materials
Asset Preservation: Pavement Conditions (5.5.1)

El Paso/Santa Teresa/Chihuahua Region Pavement Conditions

Laredo/Coahuila/Nuevo León/Tamaulipas Region Pavement Conditions

Rio Grande Valley/Tamaulipas Region Pavement Conditions
Asset Preservation: Bridge Conditions (5.5.2)

El Paso/Santa Region Bridge Conditions

Laredo Region Bridge Conditions

RGV Region Bridge Conditions
Asset Preservation: Border Crossing Conditions (5.5.3)

- Border crossings have **no consistent funding sources nor asset management programs** to ensure adequate maintenance over time.
- Opportunities to improve the more than two-thirds of border crossings are in **fair condition** (and could deteriorate to poor conditions).
- **50% CBP facilities are in good condition.** Lake Falcon Damn Crossing and McAllen-Hidalgo facilities are rated in poor condition.
Asset Preservation: Rail Crossings (5.5.4)

- Annual inspections and reports indicate whether the rail crossing is safe for current traffic and able to safely support the loadings (weight and mass)

- As of 2019, all rail crossings borderwide were in good serviceable condition

- Rail intermodal facilities also require maintenance over time to ensure they can sufficiently facilitate truck-rail movements
### Survey Sample of Needs by Border Crossing

<table>
<thead>
<tr>
<th></th>
<th>El Paso/Santa Teresa/Chihuahua Region</th>
<th>Laredo/Coahuila/Nuevo León/Tamaulipas Region</th>
<th>Rio Grande Valley/Tamaulipas Region</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Santa Teresa</td>
<td>Paso del Norte</td>
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<tr>
<td></td>
<td>Paso del Norte</td>
<td>Good Neighbor</td>
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<td></td>
<td>Bridge of the Americas</td>
<td>Ysleta-Zaragoza</td>
<td></td>
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<tr>
<td></td>
<td>El Paso-Santa Teresa</td>
<td>Tomillas-Guadalupe Int.</td>
<td></td>
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<tr>
<td></td>
<td>El Paso-Santa Teresa</td>
<td>Fort Hancock-El Porvenir</td>
<td></td>
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<tr>
<td></td>
<td>Presidio</td>
<td>Del Rio-Ciudad Acuña Int.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Eagle Pass</td>
<td>Camino Real Int.</td>
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<tr>
<td></td>
<td>Laredo-Colombia Solidarity</td>
<td>World Trade</td>
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<tr>
<td></td>
<td>Laredo-Colombia Solidarity</td>
<td>Gateway to the Americas</td>
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<tr>
<td></td>
<td>Laredo-Colombia Solidarity</td>
<td>Gateways to the Americas</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rio Grande City - Camargo</td>
<td>Anzalduas Int.</td>
<td></td>
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<tr>
<td></td>
<td>Roma-Ciudad Miguel Alemán</td>
<td>Almendárez Int.</td>
<td></td>
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<tr>
<td></td>
<td>McAllen-Hidalgo</td>
<td>Reynosa Int.</td>
<td></td>
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<tr>
<td></td>
<td>Donna Int.</td>
<td>Pharr-Real de Mora Int.</td>
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<td></td>
<td>Weslaco-Progress</td>
<td>Free Trade</td>
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<tr>
<td></td>
<td>Gateway Int.</td>
<td>B &amp; M Gateway Int.</td>
<td></td>
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<tr>
<td>Capacity constraints of key corridors</td>
<td>X X X X X</td>
<td>X X X X X</td>
<td></td>
</tr>
<tr>
<td>Capacity constraints of connectors</td>
<td>X X X X</td>
<td>X X X</td>
<td></td>
</tr>
<tr>
<td>Capacity constraints of interchanges</td>
<td>X X X</td>
<td>X X X X X</td>
<td></td>
</tr>
<tr>
<td>Lack of connectivity to key corridors</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Traffic Impacts on neighborhoods and residential areas</td>
<td>X</td>
<td>X X X X X</td>
<td></td>
</tr>
<tr>
<td>Lack of connectivity to key industries</td>
<td>X X X</td>
<td>X X X</td>
<td>X</td>
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</tbody>
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BTAC Feedback

1. Are there any needs that we missed?
Future Forecasts for the Texas-Mexico Border Region

Chapter 6
## Future Forecasts for the Texas-Mexico Border Region Overview

<table>
<thead>
<tr>
<th>Chapter Purpose</th>
<th>Key Messages</th>
<th>Refinements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide future forecasts to 2050 of the movements of people and goods</td>
<td>Forecast methodology accounts for historical trends and future factors</td>
<td>Provide information on through movements by border crossing/POE, and system impacts</td>
</tr>
<tr>
<td>Assess future demand for the binational transportation systems serving the Texas-Mexico border</td>
<td>Future factors include social, technical, environmental, economic, and political considerations</td>
<td>An additional 30 million people will cross the border – most by personal vehicle</td>
</tr>
<tr>
<td></td>
<td>Movement of people and goods are forecasted by mode, POE, geography</td>
<td>Truck and train movements almost triple – stressing border infrastructure capacity</td>
</tr>
<tr>
<td></td>
<td>Future scenarios will assess:</td>
<td>The value of trade crossing the border more than triples – making an effective border critical for the U.S. and Mexican economies</td>
</tr>
<tr>
<td></td>
<td>– Employment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– National economic activity (GDP)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Exchange rate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>– Border policies</td>
<td></td>
</tr>
</tbody>
</table>
Mid-Case Forecast for Movement of Goods

- Truck, rail, air cargo, pipeline, and maritime
- By movement, tonnage, and value
- By borderwide, regional, and POE/border crossing
Forecasts of Total Trade by Value Through the Texas-Mexico Border, 2017–2050 (6.8.1)

- Value of all trade **increases from $408 billion in 2017 to $1.4 trillion in 2050, an increase of 243%**
- In 2050, $434.1 billion (or 58%) of $749.4 billion in northbound trade (Mexican exports to the U.S.) is through Texas
Forecasts of Total Trade by Tonnage Through the Texas-Mexico Border, 2017–2050 (6.8.1)

- Total tonnage increases from 107.8 million in 2017 to 344.0 million in 2050, an increase of 219% with faster growth in the northbound direction (241%)
- Most (more than 50% northbound and 70% southbound) of the tonnage crossing the border goes through Texas to other U.S. states
Future Movement of Goods by Tonnage Through Texas-Mexico Border: Truck (6.8.1)

- Tonnage moved by trucks increases from 64.8 million in 2017 to 227.5 million in 2050, an increase of 251%.
- In 2050, the Laredo/Coahuila/Nuevo León/Tamaulipas Region accounts for 133.1 million (59%) of 227.5 million tons moved by trucks (compare a 62% share in 2017).
Future Movement of Goods by Tonnage Through Texas-Mexico Border: Truck (6.8.1)

- The Laredo POE grows from 38 million tons in 2017 to 117 million tons in 2050, an increase of 208%.
- In 2050, the Laredo POE accounts for 117 million tons (or 51%) of 227.5 million tons moved by trucks, a decline from a 59% share in 2017.
Future Movement of Goods by Value Through Texas-Mexico Border: Truck (6.8.1)

- Value of goods moved by truck grows from $305.5 billion in 2017 to $1,123 billion in 2050, an increase of 268% (compared to an increase of 251% for tonnage)
- In 2050, the Laredo/Coahuila/Nuevo León/Tamaulipas Region accounts for $555.3 million (49%) of $1,123 million moved by trucks (compared to 59% share in 2017)
Future Movement of Goods by Value Through Texas-Mexico Border: Truck (6.8.1)

- Value of goods moved by truck through Laredo POE grows from $165 billion in 2017 to $482 billion in 2050, an increase of 192%.
- Four POEs surpass $100 million in annual trade by truck by 2050: Laredo, El Paso, Hidalgo, and Santa Teresa.
Future Truck Movement Through Texas-Mexico Border (6.8.1)

- Truck movements grow from 4.3 million in 2017 to 12.3 million in 2050, an increase of 186%.
- In 2050, the Laredo/Coahuila/Nuevo León/Tamaulipas Region accounts for 7.1 million (58%) of 12.3 million truck movements (compared to 56% share in 2017).
Future Truck Movement Through Texas-Mexico Border (6.8.1)

- Truck movements through World Trade grows from 1.7 million in 2017 to 5.1 million in 2050, an increase of 200%
- In 2050, the World Trade accounts for 5.1 million (or 41%) of 12.3 million truck movements, an increase from a 40% share in 2017
Future Rail Movement of Goods by Tonnage Through Texas-Mexico Border:
Rail (6.8.1)

- Rail tons increase from 42.9 million in 2017 to 116.1 million in 2050, an increase of 171%.
- In 2050, the Laredo/Coahuila/Nuevo León/Tamaulipas Region accounts for 86.8 million (75%) of 116.1 million rail tons, a decrease from an 85% share in 2017.
Future Movement of Goods by Value Through Texas-Mexico Border: Rail (6.8.1)

- Value of goods moved by rail increase from $71.3 billion in 2017 to $196.9 million in 2050, an increase of 176%.
- In 2050, the Laredo/Coahuila/Nuevo León/Tamaulipas Region accounts for $165.1 billion (84%) of $196.9 million moved by rail, a decrease from a 86% share in 2017.
Future Movement of Goods by Rail Through Texas-Mexico Border: Rail (6.8.1)

- By 2050, the Eagle Pass Rail Bridge will move more goods by tonnage than any other rail crossing, compared to 2017 when Laredo Rail Bridge had the most tonnage.
- Laredo Rail Bridge will move the most goods by value at $108.6 million in 2050.
Future Movement of Goods by Rail Through Texas-Mexico Border (6.8.1)

- Railcar movements increase from 1.0 million in 2017 to 2.6 million in 2050, an increase of 160%
- In 2050, the Laredo/Coahuila/Nuevo León/Tamaulipas Region accounts for 2.1 million (88%) of 2.6 million rail movements, an increase from a 80% share in 2017
Future Movement of Goods by Rail Through Texas-Mexico Border (6.8.1)

- In 2050, the Laredo Rail Bridge accounts for 1.1 million (44%) of 2.6 million rail movements, an increase from a 42% share in 2017
- In 2050, the Eagle Pass Rail Bridge accounts for 0.9 million (37%) of 2.6 million rail movements, an increase from a 36% share in 2017
Future Movement of Goods by Air Through Texas-Mexico Border (6.10.1)

- Air cargo volumes between Texas and Mexico will grow from 28.5 thousand tons in 2017 to 130.3 thousand tons in 2050, an increase of 357%.
- **Air cargo values will increase from $1.8 billion in 2017 to $13.0 billion in 2050, an increase of 622%**.
Pipeline tonnage increases from 25.6 million in 2017 to 52.0 million in 2050, an increase of 103% (primarily southbound shipments of natural gas and petroleum products).

The value of goods moved by pipeline will increase from $4.0 billion in 2017 to $8.3 billion in 2050, an increase of 108%.
Future Movement of Goods by Maritime Through Texas-Mexico Border (6.10.3)

- Maritime tonnage will grow from 36.9 million tons in 2017 to 45.6 million tons in 2050, an increase of 24%
- **Overall value shipped by maritime will increase from $25.8 billion in 2017 to $53.8 billion in 2050, an increase of 109%**
Mid-Case Forecast for Movement of People

- By mode of travel
- By borderwide, regional, and border crossing
Future Movement of People Through Texas-Mexico Border (6.8.2)

- People crossing the border increase from 87.7 million in 2017 to 112.4 million in 2050, an increase of 28% (25 million people).
- El Paso/Santa Teresa/Chihuahua and Rio Grande Valley/Tamaulipas regions each account for 40.8 million (or 36%) of 112.4 million total crossings in 2050.
Future Movement of People Through Texas-Mexico Border: Personally Owned Vehicles (6.8.2)

- Personally owned vehicle movements increase from 35.2 million in 2017 to 44.5 million in 2050, an increase of 26%
- The greatest increase (38%) is in the Rio Grande Valley/Tamaulipas Region, which increases from 11.7 million in 2017 to 16.2 million vehicles in 2050
Future Movement of People Through Texas-Mexico Border: Personally Owned Vehicles (6.8.2)

Personally Owned Vehicle Movements by Border Crossing, 2017-2050

<table>
<thead>
<tr>
<th>Border Crossing</th>
<th>2017</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td>Júarez - Lincoln</td>
<td>3.5</td>
<td>4.7</td>
</tr>
<tr>
<td>Bridge of the Americas</td>
<td>4.3</td>
<td>4.7</td>
</tr>
<tr>
<td>Paso del Norte - McAllen</td>
<td>4.0</td>
<td>4.5</td>
</tr>
<tr>
<td>Reynosa, Texas - Hidalgo</td>
<td>3.4</td>
<td>3.2</td>
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<td>Reynosa, Texas - Nuevo Laredo</td>
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<td>1.5</td>
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<td>Reynosa, Texas - Zapata</td>
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<td>Reynosa, Texas - Ciudad Juarez</td>
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<tr>
<td>Reynosa, Texas - Ciudad Miguel Aleman</td>
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<tr>
<td>Reynosa, Texas - Progreso</td>
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<td>0.4</td>
</tr>
<tr>
<td>Reynosa, Texas - San Jeronimo</td>
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<td>0.4</td>
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<tr>
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<td>Reynosa, Texas - El Palmar</td>
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</tr>
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<td>Reynosa, Texas - El Batallón</td>
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<td>Reynosa, Texas - Lake Alamo</td>
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</tr>
<tr>
<td>Reynosa, Texas - Lake Amistad</td>
<td>0.1</td>
<td>0.0</td>
</tr>
</tbody>
</table>
Future Movement of People Through Texas-Mexico Border: Bicycles and Pedestrians (6.8.2)

- Bicycle and pedestrian movements increase from 17.3 million in 2017 to 23.0 million to 2050, an increase of 33%
- The greatest increase (39%) is in the Rio Grande Valley/Tamaulipas Region, which increases from 6.1 million in 2017 to 8.5 million movements in 2050.
Future Movement of People Through Texas-Mexico Border: Bicycles and Pedestrians (6.8.2)

Bicycle and Pedestrian Movements by Border Crossing, 2017-2050

*for border crossings with more than 100,000 crossings in 2050

- Paso del Norte
- McAllen - Hidalgo International
- Yeleta - Zaragoza
- Weslaco - Progresso International
- Bridge of the Americas
- Eagle Pass 1
- B&M
- Juarez - Lincoln
- Roma - Ciudad Miguel Aleman
- Del Rio - Ciudad Acuna
- Veterans International Bridge at Los"
Future Movement of People Through Texas-Mexico Border: Passenger Bus (6.8.2)

- Bus movements increase from 86.6 million in 2017 to 88.5 million movements in 2050, an increase of 2.2%.

- The El Paso/Santa Teresa/Chihuahua Region will increase from 16.8 million bus movements in 2017 to 18.8 million in 2050, an increase of 12% (unlike other regions).
Future Movement of People Through Texas-Mexico Border: Mid-Case Forecast – Passenger Bus (6.8.2)

Bus Movements by POE, 2017-2050

<table>
<thead>
<tr>
<th>Location</th>
<th>2017</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laredo</td>
<td>40.2</td>
<td>39.4</td>
</tr>
<tr>
<td>Hidalgo</td>
<td>20.8</td>
<td>20.9</td>
</tr>
<tr>
<td>El Paso</td>
<td>15.9</td>
<td>17.5</td>
</tr>
<tr>
<td>Brownsville</td>
<td>6.5</td>
<td>6.3</td>
</tr>
<tr>
<td>Eagle Pass</td>
<td>1.9</td>
<td>2.6</td>
</tr>
<tr>
<td>Presidio</td>
<td>0.7</td>
<td>1.1</td>
</tr>
<tr>
<td>Roma</td>
<td>0.4</td>
<td>0.5</td>
</tr>
<tr>
<td>Santa Teresa</td>
<td>0.3</td>
<td>0.3</td>
</tr>
</tbody>
</table>

*Information not available at the border crossing level*
Forecast of Future System Performance

- Passenger and commercial wait times
- Vehicle miles traveled
Forecast of System Performance: Passenger Wait Times (6.11.1)

- Passenger vehicle growth from 2017 to 2050 is moderate (26%), which leads to a small escalation in wait times at most crossings.

- Wait times increase 506% from 16 minutes in 2017 to 97 minutes in 2050 at Anzalduas International and 485% from 13 minutes in 2017 to 76 minutes in 2050 at Donna International, highlighting the need for solutions to address demand.
Forecast of System Performance: Commercial Wait Times (6.11.1)

- Commercial vehicle wait times increase dramatically by 2050 for both average and 90th percentile
- For many of the larger crossings, average wait times will be 2 to 3 hours in 2050
- At the largest crossing, World Trade Bridge, the average wait time will increase from 24 minutes in 2017 to 204 minutes in 2050, an increase of 750%
Forecast of System Performance: Vehicle Miles Traveled (6.9.1)

- Vehicle miles traveled in Texas border counties will grow from 64.8 million in 2017 to 134.6 million in 2050, an increase of 108%.
- Travel in the Rio Grande Valley/Tamaulipas Region will grow from 27.4 million vehicle miles in 2017 to 63.9 million in 2050, an increase of 133% (largest among regions).

### Texas Borderwide Vehicle Miles Traveled

- **Texas Borderwide**: From 64.8 million in 2017 to 134.6 million in 2050, an increase of 108%.
- **El Paso**: From 23.6 million in 2017 to 40.0 million in 2050.
- **Laredo**: From 27.4 million in 2017 to 30.7 million in 2050.
- **RGV**: From 13.8 million in 2017 to 63.9 million in 2050, an increase of 133% (largest among regions).
Alternate Future Scenarios

- Assumptions
- Movement of People and Goods
The mid case reflects a continuation of prevailing trends
- 2.1% annual employment growth
- 1.8% annual economic growth (U.S.)
- Stable currencies

Alternate future scenarios are based on factors affecting the movement of people and goods across the border
- **Low case:** slower economic growth and restrictive border policies
- **High case:** higher economic growth, facilitative border policies and additional infrastructure

### Low-Case Scenario
- Slower employment growth (1.3% per year)
- Slower national economic growth (1.6% per year)
- Peso (40% devaluation)
- Restrictive border & trade policies (-25% impact on people, -10% on goods)

### High-Case Scenario
- Additional infrastructure investments
- Faster employment growth (2.4% per year)
- Faster national economic growth (2% per year)
- Peso (20% appreciation)
- Greater trade integration (+10% impact)
Alternate Future Scenarios: Movement of People (6.12)

- In the low case, the movement of people is lower due to economic conditions, the exchange rate, and border policies
  - Cross-border land movements decline by more than 22 million to 2011 levels

- In the high case, the movement of people increases by more than 50 million, straining border infrastructure
  - Consistent with post-2011 trends

![Movement of People (2050)]
**Alternate Future Scenarios: Movement of Goods (6.12)**

- **Even in the low case, cross-border movement of goods doubles, which will strain border infrastructure**
  - Over the long run, the U.S. and Mexico economies still grow, driving the demand for goods

- **In the high case, trucks more than triple and rail containers nearly triple, driving the need for additional capacity**
  - With greater economic integration between the U.S. and Mexico, an efficient border is critical for the economies of both countries

![Graph showing Northbound Freight Crossings (2050)]
Border crossing capacity is anticipated to be strained even further, in particular for the movement of goods

- Commercial vehicles expected to grow across capacity-constrained border crossings
- Wait times anticipated to increase significantly if no action is taken

North-south regional roadways providing access to border crossings are particularly affected with limited other options to move people and goods

- I-35 into and out of Laredo
- I-10 in El Paso, impacting east-west connectivity with Laredo and RGV regions
- I-69, US 59, and US 77 in RGV
What Do the Forecast Results Mean for the BTMP?

- Usage of the POEs along the Texas-Mexico border will increase, regardless of future scenario
- The mix of traffic across the border will shift towards the movement of goods
- Infrastructure improvements will be needed to accommodate future demand
BTAC Feedback

1. Have we missed anything?
2. Did we address your comments?
Economic Importance of the Border

Chapter 7
### Economic Importance of the Border

<table>
<thead>
<tr>
<th>Chapter Purpose</th>
<th>Key Messages</th>
<th>Refinements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstrate the economic importance of the border</td>
<td>The Texas-Mexico border supports the economies of the border region in Mexico, Texas, and the U.S.</td>
<td>The Texas-Mexico border generates more than $325 billion annually in GDP and generates 6.2 million jobs in both countries</td>
</tr>
<tr>
<td>Highlight the economic impacts of border delays and need for infrastructure</td>
<td>The benefit of trade extends to U.S. and Mexican states beyond the border</td>
<td>This importance will more than triple by 2050, generating more than $1 trillion in GDP</td>
</tr>
<tr>
<td>Provide input into the investment plan</td>
<td>Current delays at the border represent missed economic opportunities</td>
<td>The vast majority of the economic impact is due to the movement of goods</td>
</tr>
<tr>
<td></td>
<td>Future delays will grow as a result of increased demand</td>
<td>Border crossing delays represent missed economic opportunities of more than $2.7 billion annually in 2017 for both countries and will skyrocket by 2050 to over $30 billion</td>
</tr>
</tbody>
</table>
Economic Impacts from Movement of Goods Across the Border

- Total economic impact
- Key supply chain impact
- Binational, national, state, regional, and border crossing economic impact
Contribution of Texas-Mexico Border to U.S.-Mexico Trade (7.2)

- Approximately 75% of U.S.-Mexico truck and rail trade (in terms of value) was processed at a Texas border crossing.
- The flow of trade across the Texas-Mexico border varies by supply chain.
- The supply chains represent an array of product types that reflect the integrated nature of trade across the border.

Source: U.S. Bureau of Transportation Statistics, North America Transborder Freight Data
Economic impact of goods movement across the Texas-Mexico border reaches far beyond the border.

In the U.S., Michigan and Illinois experience some of the greatest impacts.

In Mexico, the impact of trade reaches Ciudad de México, Jalisco, Guanajuato, and other states.
Between 2006 and 2017, the Texas-Mexico border contributed approximately $3.3 trillion dollars to the U.S. and Mexican economies.
Economic Importance of Travel Through the Border: Current Goods Movement (7.2)

- Truck movements generate nearly $259 billion annually in GDP
  - $162 billion in the U.S.
  - $97 billion in Mexico

- Freight rail movements generate more than $55 billion annually in GDP
  - $29 billion in the U.S.
  - $27 billion in Mexico
Economic Importance of Travel Through the Border: Current Goods Movement, Highway Network (7.2.1)

- Truck movements generate **nearly $259 billion annually in GDP**
- These movements generate **more than 5.1 million jobs**

Current Movement of Goods by Border Crossings and Highway Network

<table>
<thead>
<tr>
<th>Region</th>
<th>U.S. Side GDP</th>
<th>Mexico Side GDP</th>
<th>U.S. Side Jobs</th>
<th>Mexico Side Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>EL PASO/SANTA TERESA/CHIHUAHUA</td>
<td>$45.0 Billion</td>
<td>$24.4 Billion</td>
<td>368 Thousand</td>
<td>652 Thousand</td>
</tr>
<tr>
<td>LAREDO/COAHUILA/NUEVO LEÓN/TAMAULIPAS</td>
<td>$96.0 Billion</td>
<td>$56.7 Billion</td>
<td>818 Thousand</td>
<td>1.8 Million</td>
</tr>
<tr>
<td>RIO GRANDE VALLEY/TAMAULIPAS</td>
<td>$20.7 Billion</td>
<td>$16.0 Billion</td>
<td>172 Thousand</td>
<td>1.3 Million</td>
</tr>
</tbody>
</table>
These movements also generate economic importance through travel through the border: current goods movement, highway network (7.2.1).

The GDP impact of 2017 movement of goods by border crossings and highway network is illustrated in the chart.

- **United States** is represented in blue bars.
- **Mexico** is represented in orange bars.

The chart shows the economic impact of goods movement through various border crossings and highway networks, highlighting the significant contributions of different crossing points to the overall economic impact.

For example:
- **Santa Teresa Bridge of the Americas** had an impact of $13.2 B.
- **Del Rio-Ciudad Acuña Intl.** had an impact of $120.2 B.
- **Laredo-Colombia Solidarity** had an impact of $20.9 B.
- **World Trade** had the highest impact, $68.9 B.

The chart also indicates the distribution of goods movement between the United States and Mexico, with significant contributions from both countries across various border crossings.
Economic Importance of Goods Movement Through the Texas-Mexico Border: 2050 (7.2)

- Economic impact of goods movement across the border expected to more than triple by 2050
- Truck movements will more than triple and generate nearly $925 billion in GDP by 2050
  - $608 billion in the U.S.
  - $316 billion in Mexico
- Freight rail movements will nearly triple generating more than $140 billion annually in GDP by 2050
  - $73 billion in the U.S.
  - $67 billion in Mexico
Texas-Mexico Border Transportation Master Plan

**Economic Importance of Travel Through the Border: 2050 Goods Movement, Highway Network (7.2.2)**

- Truck movements will generate **nearly $925 billion** in GDP in 2050 (more than triple current impact)
- These movements will generate **more than 17 million jobs** in 2050

### Future Movement of Goods by Border Crossings and Highway Network

<table>
<thead>
<tr>
<th>Region</th>
<th>Impact on GDP in 2050</th>
<th>U.S. Side</th>
<th>Mexico Side</th>
<th>Jobs Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EL PASO/SANTA TERESA/CHIHUAHUA REGION</strong></td>
<td>$316.1 BILLION</td>
<td>$215.9 BILLION</td>
<td>$100.2 BILLION</td>
<td>1.8 MILLION</td>
</tr>
<tr>
<td><strong>LAREDO/COAHUILA/NUEVO LEÓN/TAMAULIPAS REGION</strong></td>
<td>$439.7 BILLION</td>
<td>$283.1 BILLION</td>
<td>$156.6 BILLION</td>
<td>2.5 MILLION</td>
</tr>
<tr>
<td><strong>RIO GRANDE VALLEY/TAMAULIPAS REGION</strong></td>
<td>$168.3 BILLION</td>
<td>$109.2 BILLION</td>
<td>$59.1 BILLION</td>
<td>0.9 MILLION</td>
</tr>
</tbody>
</table>

*U.S. Side supports 1.8 million jobs, Mexico side supports 2.7 million jobs*
GDP Impact of 2050 Movement of Goods by Border Crossings and Highway Network

Billions

Santa Teresa: $98.9 B
Bridge of the Americas: $30.1 B
Ysleta-Zaragoza: $22.1 B
Tomillo-Guadalupe Intl.: $14.6 B
Presidio: $7.6 B
Del Rio-Ciudad Acuña Intl.: $8.8 B
Camino Real Intl.: $23.8 B
Laredo-Colombia Solidarity: $41.3 B
World Trade: $201.5 B
Roma-Ciudad Miguel Aleman: $0.3 B
Rio Grande City-Camargo: $0.4 B
Arizalduas Intl.: $6.6 B
Pham-Reynosa Intl.: $59.3 B
Donna Intl.: $1.2 B
Weslaco-Progreso: $1.8 B
Free Trade: $1.5 B
Veterans Intl. (Los Tomates): $17.4 B

United States
Mexico

Economic Importance of Travel Through the Border: 2050 Goods Movement, Highway Network (7.2.2)
### Economic Importance of Travel Through the Border: Current Goods Movement, Freight Rail (7.2.3)

- Freight rail movements generate more than $55 billion annually in GDP
- They also generate more than 920,000 jobs

#### Current Movement of Goods by Rail Network

<table>
<thead>
<tr>
<th>Region</th>
<th>Impact on GDP in 2017</th>
<th>U.S. Side</th>
<th>Mexico Side</th>
<th>U.S. Side Supports</th>
<th>Mexico Side Supports</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso/Santa Teresa/Chihuahua</td>
<td>$6.1 Billion</td>
<td>$2.2 Billion</td>
<td>$3.9 Billion</td>
<td>21 Thousand Jobs</td>
<td>77 Thousand Jobs</td>
</tr>
<tr>
<td>Laredo/Coahuila/Nuevo Leon/Tamaulipas</td>
<td>$48.5 Billion</td>
<td>$26.0 Billion</td>
<td>$22.5 Billion</td>
<td>233 Thousand Jobs</td>
<td>513 Thousand Jobs</td>
</tr>
<tr>
<td>Rio Grande Valley/Tamaulipas</td>
<td>$0.7 Billion</td>
<td>$0.5 Billion</td>
<td>$0.2 Billion</td>
<td>4 Thousand Jobs</td>
<td>78 Thousand Jobs</td>
</tr>
</tbody>
</table>
Nearly 70% of the impact of northbound trade on GDP is from the movement of motor vehicles (particularly through Laredo). Motor vehicles and machinery together make up over 40% of the impact southbound.
Economic Importance of Travel Through the Border: 2050 Goods Movement, Freight Rail (7.2.4)

- Freight rail movements will generate more than $140 billion annually in GDP in 2050 (more than double current impact)

Future Movement of Goods by Rail Network

- **EL PASO/SANTA TERESA/CHIHUAHUA REGION**
  - **$14.3 BILLION**
  - IMPACT ON GDP IN 2050
  - U.S. SIDE: $5.6 BILLION
  - MEXICO SIDE: $8.7 BILLION
  - U.S. SIDE SUPPORTS 53 THOUSAND JOBS
  - MEXICO SIDE SUPPORTS 168 THOUSAND JOBS

- **LAREDO/COAHUILA/NUEVO LEÓN/TAMAULIPAS REGION**
  - **$117.9 BILLION**
  - IMPACT ON GDP IN 2050
  - U.S. SIDE: $61.6 BILLION
  - MEXICO SIDE: $56.3 BILLION
  - U.S. SIDE SUPPORTS 549 THOUSAND JOBS
  - MEXICO SIDE SUPPORTS 1.3 MILLION JOBS

- **RIO GRANDE VALLEY/TAMAULIPAS REGION**
  - **$8.6 BILLION**
  - IMPACT ON GDP IN 2050
  - U.S. SIDE: $6.3 BILLION
  - MEXICO SIDE: $2.3 BILLION
  - U.S. SIDE SUPPORTS 48 THOUSAND JOBS
  - MEXICO SIDE SUPPORTS 169 THOUSAND JOBS

- They will also generate almost 2.3 million jobs in 2050
Economic Importance of Travel Through the Border: 2050 Goods Movement, Freight Rail (7.2.4)

GDP Impact of 2050 Movement of Goods by Border Crossings and Rail Network

- **El Paso Rail Bridges**: $5.6 B
- **Presidio–Ojinaga Intl. Rail Bridge**: $8.7 B
- **Eagle Pass Bridges**: $0.0 B
- **Laredo Texas Mexican Railway Intl. Bridge**: $43.5 B
- **Brownsville West Rail Bridge**: $6.3 B

**Billions**

- United States
- Mexico
Economic Impacts from Movement of People Across the Border

- Total economic impact
- Economic impact by mode, region, and border crossing
Pedestrian and personal vehicle trips strongly influence the border economy.

- The movement of people generates over $9 billion annually in GDP
  - $6.5 B in the U.S.
  - $2.8 B in Mexico
- The impacts are generated primarily by passenger vehicles
### Economic Importance of Travel Through the Border: Current People Movement (7.3.1)

- People movements generate **more than $9 billion annually in GDP**
- These movements also generate **almost 230,000 jobs**

#### Current Movement of People by Border Crossings

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso/Santa Teresa/Chihuahua</td>
<td>$3.8 billion</td>
<td>$2.6 billion</td>
<td>$1.2 billion</td>
<td>56,000 jobs</td>
<td>37,000 jobs</td>
</tr>
<tr>
<td>Laredo/Coahuila/Nuevo Leon/Tamaulipas</td>
<td>$2.4 billion</td>
<td>$1.7 billion</td>
<td>$0.7 billion</td>
<td>36,000 jobs</td>
<td>24,000 jobs</td>
</tr>
<tr>
<td>Rio Grande Valley/Tamaulipas</td>
<td>$3.1 billion</td>
<td>$2.2 billion</td>
<td>$0.9 billion</td>
<td>46,000 jobs</td>
<td>30,000 jobs</td>
</tr>
</tbody>
</table>
Economic Importance of Travel Through the Border: Current People Movement (7.3.1)
Economic Importance of Travel Through the Border: 2050 People Movement (7.3.2)

- Relative share of GDP impacts compared to the movement of goods is less in the future
- The movement of people will grow by 28% and generate nearly $12 billion annually in GDP in 2050
  - $8.3 billion in the U.S.
  - $3.5 billion in Mexico
- Passenger vehicles remain the primary mode of travel
People movements generate more than $9 billion annually in GDP in 2050.

These movements will also generate almost 230,000 jobs in 2050.

Future Movement of People by Border Crossings:

**EL PASO/SANTA TERESA/CHIHUAHUA REGION**
- **$4.3 BILLION IMPACT ON GDP IN 2050**
- U.S. SIDE: $3.0 BILLION
  - MEXICO SIDE: $1.3 BILLION
- U.S. SIDE SUPPORTS 64 THOUSAND JOBS
- MEXICO SIDE SUPPORTS 42 THOUSAND JOBS

**LAREDO/COAHUILA/NUEVO LEÓN/TAMAULIPAS REGION**
- **$3.2 BILLION IMPACT ON GDP IN 2050**
- U.S. SIDE: $2.3 BILLION
  - MEXICO SIDE: $0.9 BILLION
- U.S. SIDE SUPPORTS 47 THOUSAND JOBS
- MEXICO SIDE SUPPORTS 31 THOUSAND JOBS

**RIO GRANDE VALLEY/TAMAULIPAS REGION**
- **$4.3 BILLION IMPACT ON GDP IN 2050**
- U.S. SIDE: $3.0 BILLION
  - MEXICO SIDE: $1.3 BILLION
- U.S. SIDE SUPPORTS 64 THOUSAND JOBS
- MEXICO SIDE SUPPORTS 42 THOUSAND JOBS
Economic Importance of Travel Through the Border: 2050 People Movement (7.3.2)
Economic Cost of Border Wait Times on Movement of Goods

- Economic impact of border wait times on movement of goods
- Binational, national, state, regional, and border crossing economic impact
Current border delays reduce U.S. GDP by $881.7 million and Mexico’s GDP by $887.6 million.

The lost economic activity would have generated nearly 100,000 jobs annually, which would have paid over $1 billion in labor income.
GDP Impact of 2017 Border Delays by Border Crossings and Highway Network

United States  Mexico

- Santa Teresa
  - United States: $74.7 M
  - Mexico: $48.0 M
- Bridge of the Americas
  - United States: $73.4 M
  - Mexico: $54.4 M
- Ysleta-Zaragoza
  - United States: $139.3 M
  - Mexico: $103.3 M
- Presidio
  - United States: $0.3 M
  - Mexico: $0.4 M
- Del Rio-Ciudad Acuña Int'l
  - United States: $8.2 M
  - Mexico: $8.4 M
- Camino Real Int'l
  - United States: $8.6 M
  - Mexico: $9.4 M
- Laredo-Colombia Solidarity
  - United States: $85.1 M
  - Mexico: $81.9 M
- World Trade
  - United States: $280.5 M
  - Mexico: $270.0 M
- Roma-Ciudad Miguel Aleman
  - United States: $0.0 M
  - Mexico: $0.0 M
- Rio Grande City-Camargo
  - United States: $0.0 M
  - Mexico: $1.7 M
- Pharr-Reynosa Int'l
  - United States: $166.9 M
  - Mexico: $166.9 M
- Weslaco-Progreso
  - United States: $3.7 M
  - Mexico: $1.3 M
- Free Trade
  - United States: $4.6 M
  - Mexico: $2.4 M
- Veterans Int'l (Los Tomates)
  - United States: $36.5 M
  - Mexico: $19.2 M

Economic Impacts of Border Delays: Current Goods Movement by Border Crossing (7.4.1)
The impact of border delays on GDP will increase more than 1600% to $19.3 billion in the U.S. and $11.6 billion in Mexico by 2050.

Lost economic activity would have generated nearly 1.3 million jobs, which would have paid close to $20 billion in labor income by 2050.

### Future Delays of Moving Goods across the Texas-Mexico Border

<table>
<thead>
<tr>
<th>Region</th>
<th>Impact on GDP in 2050</th>
<th>U.S. Side</th>
<th>Mexico Side</th>
<th>U.S. Side Represents</th>
<th>Mexico Side Represents</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso/Santa Teresa/Chihuahua</td>
<td>$11.9 billion</td>
<td>$7.9 billion</td>
<td>$4.0 billion</td>
<td>64 thousand jobs</td>
<td>256 thousand jobs</td>
</tr>
<tr>
<td>Laredo/Coahuila/Nuevo Leon/Tamaulipas</td>
<td>$10.3 billion</td>
<td>$6.1 billion</td>
<td>$4.2 billion</td>
<td>55 thousand jobs</td>
<td>338 thousand jobs</td>
</tr>
<tr>
<td>Rio Grande Valley/Tamaulipas</td>
<td>$8.7 billion</td>
<td>$5.3 billion</td>
<td>$3.4 billion</td>
<td>49 thousand jobs</td>
<td>551 thousand jobs</td>
</tr>
</tbody>
</table>
Economic Impacts of Border Delays: 2050 Goods Movement by Border Crossing (7.4.2)

GDP Impact of 2050 Border Delays by Border Crossings and Highway Network

- **Santa Teresa**: $4,869.6 M
- **Bridge of the Americas**: $2,016.3 M
- **Ysleta-Zaragoza**: $1,999 M
- **Presidio**: $1,127.0 M
- **Del Rio-Ciudad Acuña Intl.**: $972.4 M
- **Camino Real Intl.**: $911.7 M
- **Laredo-Colombia Solidarity**: $771.0 M
- **World Trade**: $759.6 M
- **Roma-Ciudad Miguel Aleman**: $719.6 M
- **Rio Grande City-Camargo**: $562.0 M
- **Anzalduas Intl.**: $517.0 M
- **Pharr-Reynosa Intl.**: $3,417 M
- **Veterans Intl. (Los Tomates)**: $1,070.7 M

- **United States**
- **Mexico**

United States:
- **Texas-Mexico Border Transportation Master Plan July 9, 2020**

Mexico:
- **Texas-Mexico Border Transportation Master Plan July 9, 2020**
Economic Cost of Border Wait Times on Movement of People

- Economic impact of border wait times on movement of people
- Economic impact by region and border crossing
Pedestrian, bicycle, bus and personal vehicle delays created lost economic opportunities of over $960 million in GDP.

The expenditures that did not occur because of border delays could have supported more than 24,000 jobs.

### Current Delays for the Movement of People

<table>
<thead>
<tr>
<th>Region</th>
<th>Impact on GDP in 2017</th>
<th>U.S. Side</th>
<th>Mexico Side</th>
<th>U.S. Side Represents</th>
<th>Mexico Side Represents</th>
</tr>
</thead>
<tbody>
<tr>
<td>El Paso/Santa Teresa/Chihuahua Region</td>
<td>$387.6 million</td>
<td>$268.4 million</td>
<td>$119.2 million</td>
<td>5.6 thousand jobs</td>
<td>3.8 thousand jobs</td>
</tr>
<tr>
<td>Laredo/Coahuila/Nuevo León/Tamaulipas Region</td>
<td>$248.4 million</td>
<td>$172.1 million</td>
<td>$76.3 million</td>
<td>3.6 thousand jobs</td>
<td>2.5 thousand jobs</td>
</tr>
<tr>
<td>Rio Grande Valley/Tamaulipas Region</td>
<td>$325.6 million</td>
<td>$225.7 million</td>
<td>$99.9 million</td>
<td>4.8 thousand jobs</td>
<td>3.2 thousand jobs</td>
</tr>
</tbody>
</table>
Economic Impacts of Border Delays: Current People Movement by Border Crossing (7.5.1)
The impact on GDP of delays to people crossing the border will increase by 27% from $960 million in 2017 to $1.2 billion in 2050.

The expenditures that will not occur because of border delays could have supported more than 30,000 jobs in 2050.

**Future Delays for the Movement of People**

**EL PASO/SANTA TERESA/CHIHUAHUA REGION**

- $441.3 MILLION IMPACT ON GDP IN 2050
  - U.S. SIDE: $305.5 MILLION
  - MEXICO SIDE: $135.8 MILLION
  - U.S. SIDE REPRESENTS 6.5 THOUSAND JOBS
  - MEXICO SIDE REPRESENTS 4.4 THOUSAND JOBS

**LAREDO/COAHUILA/NUEVO LEÓN/TAMAULIPAS REGION**

- $329.9 MILLION IMPACT ON GDP IN 2050
  - U.S. SIDE: $228.5 MILLION
  - MEXICO SIDE: $101.4 MILLION
  - U.S. SIDE REPRESENTS 4.8 THOUSAND JOBS
  - MEXICO SIDE REPRESENTS 3.3 THOUSAND JOBS

**RIO GRANDE VALLEY/TAMAULIPAS REGION**

- $451.4 MILLION IMPACT ON GDP IN 2050
  - U.S. SIDE: $312.9 MILLION
  - MEXICO SIDE: $138.5 MILLION
  - U.S. SIDE REPRESENTS 6.6 THOUSAND JOBS
  - MEXICO SIDE REPRESENTS 4.5 THOUSAND JOBS
Economic Impacts of Border Delays: 2050 People Movement by Border Crossing (7.5.2)
What do the Economic Impact Results Mean for the BTMP?

- Texas-Mexico border is a strategic asset
  - Today, it generates 6.2 million jobs and $325 billion annually in GDP
  - By 2050, this contribution will increase to over 20 million jobs and nearly $1.1 trillion in GDP
- The movement of goods is expected to nearly triple by 2050, causing wait times at larger crossings to increase from less than 20 minutes today to 2 to 3 hours in the future
- Currently, reducing delays to the movement of goods represent an economic opportunity of approximately $1.8 billion in GDP to the U.S. and Mexico.
- If existing infrastructure is not upgraded to meet future demands, skyrocketing border delays will have even more serious impacts on the economies of the Texas-Mexico border region, Texas, the Mexican border states, and the U.S. and Mexico overall ($30.9 billion bi-national impact)
BTAC Feedback

1. Does this provide you with a compelling case on the importance of the Texas-Mexico border?

2. Do you have any comments / thoughts about the economic impacts or economic cost of delays?
Chapter 8: Identification and Evaluation of Strategies to Address Current and Future Needs

Approach and Preliminary Analysis
## Identification and Evaluation of Strategies to Address Current and Future Needs Overview

### Chapter Purpose

- Identify key strategies that are consistent with policies, programs and projects to address current and future needs.
- Organize the strategies in a way that assists stakeholders in linking them to identified needs in the present and future.
- Evaluate strategies using criteria that reflects the BTMP goals.

### Key Messages

- There are multiple solutions to address important needs, including policies, programs, and projects.
- Strategies for border crossings and corridors will be evaluated using similar but separate approaches.
- Evaluation of strategies will be conducted using a regional approach.

### Support Messages

- Provide the framework and criteria for strategy evaluation tied to goals, mode, region and movement of people and goods.
Approach Overview: Organize and Match Strategies to Goals and Needs

- Strategies will be organized in three categories:
  - **Policies**: Positions of a public entity or organization that provide an overall framework for investment or level of effort decision-making
  - **Programs**: A plan or system of actions that are repeatable across multiple platforms or locations
  - **Projects**:
    - Infrastructure: New or expanded physical capacity
    - Operational: Tools or techniques to apply to solutions

- Within each category, strategies will be further refined by whether they apply to:
  - Border crossings or corridors
  - Movement of goods or movement of people

- Many strategies suggested in this plan cross multiple goals and categories and can be used in a variety of locations
Preliminary Identification of Policies, Programs and Projects Strategies: Process Overview

Chapter 5: Current and Future Needs Identified
- List of Policies, Programs and Projects: Existing Plans and Stakeholder Identified
- Link Policies, Programs and Projects to Needs Identified in Chapter 5
- Identify Gaps not Addressed by Identified Policy, Program and Project Strategies

Chapter 8: Evaluate Strategies

Chapters 10 and 11: Recommendations and Implementation Plan

Financially UnConstrained: High, Medium, Low Tiers
- Border Region
- Border Crossing Corridor
- Borderwide

Financially Constrained: High, Medium, Low Tiers

Recommendations (Chapter 10) & Implementation Plan (Chapter 11)
- High, Medium, Low Tiers by Geography
- Stakeholder Input: Timeline by Short (1-5 years), Mid (6-10 years) and Long (11+ years)
- Projects, Policies, and Programs by Border Region, Border Crossing, Passenger and Freight Modes

Stakeholder Input on Additional Policies, Programs and Projects to Address Gaps
BTAC Feedback

1. Are there any comments to the proposed approach and framework to identify strategies?
## Preliminary Identification of Strategy Types: Performance Needs

<table>
<thead>
<tr>
<th>Goal</th>
<th>Issue</th>
<th>Border Crossing Needs</th>
<th>Corridor Needs</th>
<th>Key Strategy Type</th>
</tr>
</thead>
</table>
| Mobility and Reliability: Operational Efficiency                    | Increasing border wait times and delays, roadway congestion, and blocked at-grade rail crossings | - Robust and coordinated border management  
- Broad integration and adoption of technologies (including border screening technology),  
- Demand management  
- Additional border inspection staff  
- Additional border hours of operation  
- Better distribution of passenger and commercial uses compared to transportation demand | - Updated transportation systems  
- Traffic optimization strategies and technology  
- Additional on-ramp and off-ramp length  
- Updated traffic signal control and coordination  
- Static message signs  
- Additional transportation choices  
- Additional connectivity for oversized and/or overweight vehicles | Policies, Programs |
| Mobility and Reliability: System Capacity                            | Insufficient physical capacity to accommodate growing traffic volumes | - Additional system capacity and alignment with existing border crossings and transportation network infrastructure  
- Additional capacity in existing border crossings  
- Limited multimodal network capacity | - Roads updated to modern design standards  
- More lane capacity on current key roads,  
- More connections between corridors and crossings  
- Highway/rail grade separation  
- Alternative transportation choices  
- Additional truck parking capacity | Projects |
## Example: Strategies to Address Border Crossing Delays

### Border Crossings – Movement of Goods

<table>
<thead>
<tr>
<th>POLICY</th>
<th>PROGRAM</th>
<th>PROJECT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Issue/Need:</strong> Demand management</td>
<td><strong>Issue/Need:</strong> Additional border hours of operation</td>
<td><strong>Issue/Need:</strong> Better distribution of passenger and commercial uses compared to transportation demand</td>
</tr>
</tbody>
</table>
| **Strategy:** Balance distribution of passenger and commercial uses based on transportation demand | **Strategy:** Truck  
  - Extended hours of operation at commercial border crossings | **Strategy:** Infrastructure  
  - Truck  
    - Additional lanes to existing border crossings that are over-capacity (regular and/or FAST) |
| **Primary Goal:**  
  - Mobility and Reliability: Operational Efficiency | **Primary Goal:**  
  - Mobility and Reliability: Operational Efficiency | **Primary Goal:**  
  - Mobility and Reliability: Operational Efficiency |
### Example: Strategies to Address Border Crossing Delays

#### Border Crossings – Movement of People

<table>
<thead>
<tr>
<th>POLICY</th>
<th>PROGRAM</th>
<th>PROJECT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Issue/Need:</strong> Demand management</td>
<td><strong>Issue/Need:</strong> Additional border inspection staff</td>
<td><strong>Issue/Need:</strong> Better distribution of passenger and commercial uses compared to transportation demand</td>
</tr>
</tbody>
</table>
| **Strategy:** Standardized information to users on wait times and congestion around border crossings | **Strategy:** Passenger Vehicles  
  ▪ Additional CBP staffing | **Strategy:** Infrastructure  
  ▪ *Passenger Vehicles*  
  ▪ Additional lanes to existing border crossings that are over-capacity (regular and/or SENTRI) |
| **Primary Goal:**  
  ▪ Mobility and Reliability: Operational Efficiency | **Primary Goal:**  
  ▪ Mobility and Reliability: Operational Efficiency | **Primary Goal:**  
  ▪ Mobility and Reliability: Operational Efficiency |
# Preliminary Evaluation of Policies, Programs and Projects: Process Overview

**Chapter 8: Preliminary Evaluation, Step 1**

**Inputs**

- List of Projects, Policies and Programs

**Evaluation Step**

- Project, Policy, Program Evaluation
  
  Order of magnitude evaluation of individual measures against key goals

**Outputs**

- Financially Unconstrained: High, Medium, Low Tiers
  
  Border Region
  Border Crossing
  Corridor
  Borderwide

**Chapters 10 and 11: Recommendations and Implementation Plan Steps 2 and 3**

**Inputs**

- Financially Constrained: High, Medium, Low Tiers

**Evaluation Step**

- Recommendations (Chapter 10) & Implementation Plan (Chapter 11)
  
  High, Medium, Low Tiers by Geography

**Outputs**

- Stakeholder Input:
  
  Timeline by Short (1-5 years), Mid (6-10 years) and Long (11+ years)

- Projects, Policies, and Programs by Border Region, Border Crossing, and Passenger and Freight Modes
BTAC Feedback

1. Are there any comments to the proposed approach and framework to evaluate strategies?
Preliminary Evaluation Framework: Policies, Programs, and Projects

Candidate Policy, Program, Project List
- Clearly-defined
- Previous plans and studies
- Stakeholder needs
- BTMP needs and gaps

Goals and Objectives
- Measures linked to goals and objectives

Policy, Program, Project Evaluation
- Data-driven
- Stakeholder input
- Simple and transparent process

Determine Program and Project Priorities
- High, medium, and low tiers
- Border region, border crossings, and corridors
## Approach Overview: Quantitative and Qualitative Measures Linked to Goals

<table>
<thead>
<tr>
<th>BTMP Goals</th>
<th>Example Indicators for Border Crossings</th>
<th>Example Indicators for Corridors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety and Security</td>
<td>Safety Hotspots around border crossing</td>
<td>Safety Hotspots in corridor; annual crashes, injuries, and fatalities per total miles traveled</td>
</tr>
<tr>
<td>Economic Competitiveness</td>
<td>Economic Impacts of movements through border crossing; international trade value and weight through border crossing</td>
<td>International trade value and weight through corridor</td>
</tr>
<tr>
<td>Mobility and Reliability</td>
<td>Border Wait Times</td>
<td>Hours of Delay</td>
</tr>
<tr>
<td>Multimodal Connectivity</td>
<td>Proximity to modal-transfer facilities; modal split through border crossing</td>
<td>Availability of modal-transfer facilities; modal split in corridor; cross-border origins and destinations</td>
</tr>
<tr>
<td>Cross-Border Resiliency</td>
<td>Bridge Redundancy</td>
<td>Network redundancy; performance of hurricane evacuation routes</td>
</tr>
<tr>
<td>Asset Preservation</td>
<td>Asset Condition – international bridges</td>
<td>Asset Condition – pavements and bridges</td>
</tr>
<tr>
<td>Sustainable Funding</td>
<td>Amount of new funding made available for binational, multimodal projects</td>
<td>Amount of new funding made available for binational, multimodal projects</td>
</tr>
<tr>
<td>Stewardship</td>
<td>Community impacts and opportunities created</td>
<td>Community impacts and opportunities created</td>
</tr>
<tr>
<td>Customer Service</td>
<td>BTMP Stakeholder Engagement participation</td>
<td>BTMP Stakeholder Engagement participation</td>
</tr>
</tbody>
</table>
## Approach Overview: Weights for BTMP Goals

**Proposed weights for BTMP Goals developed through Stakeholder Input**

<table>
<thead>
<tr>
<th>BTMP Goals</th>
<th>BTAC Votes</th>
<th>BNRSC Votes</th>
<th>Stakeholder Workshop Votes</th>
<th>Public Meeting Votes</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety and Security</td>
<td>Top Priority: 4</td>
<td>Top Priority: 11</td>
<td>Top Priority: 21</td>
<td>Top Priority: 10</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 3</td>
<td>Second Priority: 7</td>
<td>Second Priority: 12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Economic Competitiveness</td>
<td>Top Priority: 12</td>
<td>Top Priority: 12</td>
<td>Top Priority: 22</td>
<td>Top Priority: 11</td>
<td>25%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 12</td>
<td>Second Priority: 21</td>
<td>Second Priority: 27</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobility and Reliability</td>
<td>Top Priority: 14</td>
<td>Top Priority: 25</td>
<td>Top Priority: 58</td>
<td>Top Priority: 32</td>
<td>37%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 15</td>
<td>Second Priority: 20</td>
<td>Second Priority: 41</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multimodal Connectivity</td>
<td>Top Priority: 4</td>
<td>Top Priority: 4</td>
<td>Top Priority: 6</td>
<td>Top Priority: 8</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 1</td>
<td>Second Priority: 7</td>
<td>Second Priority: 12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross-Border Resiliency</td>
<td>Top Priority: 3</td>
<td>Top Priority: 8</td>
<td>Top Priority: 14</td>
<td>Top Priority: 3</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 3</td>
<td>Second Priority: 4</td>
<td>Second Priority: 13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Preservation</td>
<td>Top Priority: 0</td>
<td>Top Priority: 7</td>
<td>Top Priority: 4</td>
<td>Top Priority: 1</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 1</td>
<td>Second Priority: 8</td>
<td>Second Priority: 8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustainable Funding</td>
<td>Top Priority: 3</td>
<td>Top Priority: 1</td>
<td>Top Priority: 5</td>
<td>Top Priority: 1</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 3</td>
<td>Second Priority: 1</td>
<td>Second Priority: 12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stewardship</td>
<td>Top Priority: 0</td>
<td>Top Priority: 0</td>
<td>Top Priority: 0</td>
<td>Top Priority: 0</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 0</td>
<td>Second Priority: 0</td>
<td>Second Priority: 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td>Top Priority: 0</td>
<td>Top Priority: 0</td>
<td>Top Priority: 3</td>
<td>Top Priority: 4</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>Second Priority: 1</td>
<td>Second Priority: 2</td>
<td>Second Priority: 6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1. Do you have any comments to the proposed weights for the BTMP Goals?
Example of Project Evaluation for Border Crossings and Corridors Using BTMP Goals

<table>
<thead>
<tr>
<th>BTMP GOALS</th>
<th>POE A</th>
<th>POE B</th>
<th>POE C</th>
<th>Interstate A Widening</th>
<th>Interstate B Widening</th>
<th>Interstate C Widening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety and Security</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Economic Competitiveness</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Mobility and Reliability</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Multimodal Connectivity</td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Cross-Border Resiliency</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asset Preservation</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Sustainable Funding</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Stewardship</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL POINTS</strong></td>
<td>49</td>
<td>74</td>
<td>49</td>
<td>85</td>
<td>77</td>
<td>66</td>
</tr>
</tbody>
</table>
Approach Overview: Determine Program and Project Priorities

- Thresholds for high, medium and low tiers

<table>
<thead>
<tr>
<th>Tier</th>
<th>Threshold (Points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>&gt; 70</td>
</tr>
<tr>
<td>Medium</td>
<td>40 – 70</td>
</tr>
<tr>
<td>Low</td>
<td>&lt; 40</td>
</tr>
</tbody>
</table>

- Weight of top 3 BTMP Goals equals 73 points
BTAC Feedback

1. Do you have any comments to the proposed thresholds for the tiers?

2. Are there any comments or additional questions to the proposed approach to identify and evaluate strategies?
### Study Tasks/Three Month Look-Ahead

<table>
<thead>
<tr>
<th>Economic Analysis (Task 7)</th>
<th>Recommendations &amp; Investment Plan (Task 8)</th>
<th>Implementation Plan (Task 9)</th>
<th>Final Report</th>
</tr>
</thead>
</table>
| ▪ Assess economic impact of BTMP recommendations | ▪ Finalize project prioritization process  
▪ Draft prioritize programs & projects from existing plans and stakeholders  
▪ Identify funding sources | ▪ Identify methodology to create implementation plan  
▪ Draft implementation plans for high-priority policies, programs & projects | ▪ Draft version of final report  
▪ Draft version of executive summary |

<table>
<thead>
<tr>
<th>Next BNRSC Meetings</th>
<th>Next BTAC Meeting</th>
<th>Next BTAC Meeting Content</th>
</tr>
</thead>
</table>
▪ Chapter 9: Stakeholder Engagement  
▪ Chapter 10: Recommendations  
▪ Chapter 11: Implementation Plan |
| ELP: July 28, 2020  |                  |                           |
| LRD: July 29, 2020  |                  |                           |
**BTMP Schedule**

- **BTAC April 2020**
  - Texas Transportation Commission Meeting May 2020
  - BNRSC Round 4 April 21-23, 2020
- **June-July 2020**
  - BNRSC Round 5 June-July 2020
  - BTAC Review Chapters 2-7 June 2020
  - Full Round Feedback July 2020
- **August 2020**
  - Full Round Feedback August 2020
  - BTAC Review Chapters 8-11 August 2020
- **October 2020**
  - Texas Transportation Commission Meeting Present Final Report
  - Proposed Final BTMP Adoption December 2020
  - BTAC Final Report & PPT Review September 2020
Final Thoughts?