## Background

### The Evolution of Transportation

<table>
<thead>
<tr>
<th>From…</th>
<th>To…</th>
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<tbody>
<tr>
<td>Moving vehicles</td>
<td>Moving people and freight</td>
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<tr>
<td>Individual modes and facilities</td>
<td>Complete end-to-end trip</td>
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<tr>
<td>Individual jurisdictions</td>
<td>Economic regions and trade corridors</td>
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<tr>
<td>Physical capacity</td>
<td>Operational performance, flexibility, and reliability</td>
</tr>
<tr>
<td>Travel time and vehicle operating costs</td>
<td>Business logistics and economic competitiveness</td>
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<tr>
<td>Reacting to economic growth and community and environmental impacts</td>
<td>Proactive planning for economic, community and environmental goals</td>
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Florida is a Crossroads of North/South & East/West Trade

Source: Enterprise Florida, 2014
Technology Trends - Freight Vehicles

1900-1950
1980
2000
2020
Florida’s Changing Industry Clusters

- Financial & Professional Services
- Defense & Homeland Security
- Global Trade & Logistics
- Manufacturing
- Aviation and Aerospace
- Life Sciences
- Information Technology
- Cleantech
- Agriculture
- Construction
- Tourism

Source: Florida Department of Economic Opportunity
Shift to Megaregions

The Emerging Megaregions

Florida Department of Transportation
FDOT’s Evolution

- New Freight, Logistics and Passenger Operations Office
- New State Freight, Logistics and Passenger Operations Administrator
- New full-time Freight Coordinators in each FDOT District
- Began several joint efforts with partner agencies
- Developed 1st Statewide Freight Plan
Institutionalizing Freight Planning

- The 1\textsuperscript{st} Statewide Freight Plan is complete – now what?
- Reviewing our performance with the FMTP Implementation Guide
  - Enhancement of FreightMovesFlorida.com
  - Participate in trade missions
  - Develop freight resources
  - Coordinate statewide and local freight planning
  - Provide internal supply chain training
  - Use District Freight Coordinators effectively
  - Integrate freight goals and objectives
Planning at FDOT

- Needed to address transportation issues at a very high level, as well as down to specifics of individual programs and modes of transportation

Florida Transportation Plan

- Strategic Intermodal System (SIS) Policy Plan
- Freight Mobility and Trade Plan

Aviation
Spaceports
Rail
Seaports
Highway
Bike/Ped/Transit
Planning at FDOT

- Aviation System Plan
- Air Cargo System Plan
- Spaceports System Plan
- Rail System Plan
- Seaports System Plan
- Waterways System Plan
- Motor Carrier System Plan
Why A Motor Carrier System Plan?

- FDOT’s historical approach to Motor Carrier has been in terms of asset protection (compliance and size and weight issues) and safety
- Want to take that next step to focus on the facilitation of truck movement and identifying key motor carrier policy issues
Working Group

- Internal Working Group will act as an informal steering committee to advise the project team
  - Provide expertise in motor carrier concerns that impact their office
  - Review draft materials before they are presented to stakeholders
  - Includes staff from various FDOT offices, as well as partner agencies that impact trucking
Business Forums

- External Business Forums will allow industry stakeholders to provide additional expertise and input
  - Provide comments on motor carrier concerns that impact you, your company, your region, etc.
  - Review draft materials before they are incorporated into the final Motor Carrier System Plan
Florida Department of Transportation

Schedule

Working Group Meeting #1
Dec 2015
Pensacola

Business Forum #1
Jan 2016

Working Group Meeting #2
March 2016

Business Forum #2
Apr 2016
Tampa/Lakeland

Working Group Meeting #3
May 2016

Business Forum #3
June 2016
Ft. Lauderdale

Working Group Meeting #4
Sept 2016
Jacksonville

Draft Plan Comment Period
Nov 2016

Clarify Purpose and Issues Identification...

Review Best Practices and Begin Solutions Identification...

Review Data/Analysis and Refine Solutions...

Building Draft Policy Plan
MOTOR CARRIER SYSTEM PLAN

Facilitated Discussion
Participant Guidelines

- Be focused and concise—balance participation & minimize repetition. Share the airtime.
- Look to the facilitator(s) to be recognized. Please raise your hand to speak.
- Speak one person at a time. Please don’t interrupt each other.
- Focus on issues, not personalities. Avoid stereotyping or personal attacks.
- Offer one idea per person without explanation.
- No comments, criticism, or discussion of other's ideas.
- Listen respectively to other's ideas and opinions.
- Represent and communicate with member’s constituent group(s).
Facilitated Discussion

- **Clarify Purpose of the Motor Carrier System Plan**
  - Now that you know what kinds of issues the plan is intended to address, please help us clarify the purpose of the Motor Carrier System Plan

- **Tentative components:**
  - Asset Protection (Compliance/Size and Weight)
  - Safety
  - Mobility/Competitive Advantage
Summary Of Identified Motor Carrier Issues

- Hours of Service
- Compliance, Safety, Accountability (CSA)
- Driver Shortage
- Driver Retention
- Truck Parking
- ELD Mandate
- Driver Health/Wellness
- Economy
- Infrastructure/ Congestion/ Funding
- Driver Distraction
- Empty Backhaul
- Alternative Fuels
- Regulatory Consistency/ Harmonization with Neighboring States
- Truck Size and Weight
- Technology Implementation
- Last Mile Connectivity
- Data

Sources: ATRI, 2015, Freight Mobility and Trade Plan, FDOT, 2014, Motor Carrier Working Group
Hours Of Service

- Ranked as **top industry issue for 3 years in a row**
- Significant negative impacts on the industry from the 34-hour restart provisions first implemented in July 2013 have been documented by numerous sources
- **80% of motor carriers** indicated a loss of productivity directly attributable to the now-suspended rules, and driver pay impacts were estimated to range from $1.6 billion to $3.9 billion annually

Source: ATRI, 2015
There is general agreement among motor carriers and enforcement personnel that **crash accountability should be a component** of the CSA Crash BASIC, however there is continued debate over the use of police accident reports (PARs) for determining crash responsibility.
Driver Shortage

- The current driver shortage is now estimated to be **48,000**, a number that is projected to increase to 175,000 by 2024.
- 45% of driver hires are done to **replace retirees**.
- Federal rules require individuals to be 21 years old to obtain a Commercial Drivers License (CDL), which can limit options for young individuals aged 18-20 who are interested in becoming truck drivers.

Source: ATRI, 2015
Driver Retention

- The industry experiences turnover rates **significantly higher** than many other sectors of the U.S. workforce, creating additional costs for motor carriers in recruitment and training.

Source: ATRI, 2015
Truck Parking

- The growing scarcity of available truck parking creates a dangerous situation for truck drivers who are often forced to drive beyond allowable HOS rules or park in undesignated and, in many cases, unsafe locations.

- FHWA recently released its Jason’s Law Truck Parking Survey Results and Comparative Analysis which confirmed that truck parking continues to be a major issue in the United States.

Source: ATRI, 2015
An electronic logging device — or ELD — is used to **electronically record a driver’s Record of Duty Status (RODS)**, which replaces the paper logbook some drivers currently use to record their compliance with Hours of Service (HOS) requirements.

In March 2014, FMCSA issued a Supplemental Notice of Proposed Rulemaking (SNPR) to address a number of concerns in the initial Electronic Logging Device (ELD) proposed rule.
Many in the industry recognize the critical connection between improved driver health and wellness and the industry’s ability to **retain qualified drivers**. Improvement in driver health may also have positive implications for industry safety as research has identified a **positive correlation between driver health and driver safety**. Source: ATRI, 2015
Economy

- A longstanding top industry issue during the years of the Great Recession
- Recent concerns over **softer freight demand** and what that may mean for 2016, as well as concerns over the economies in Europe and Asia and export impacts from a strong U.S. dollar

Source: ATRI, 2015
The United States’ 4.1 million miles of public roadways must be **properly maintained and improved** to allow the industry to efficiently deliver the nation’s goods.

The negative impacts of congestion, failing infrastructure and the need for a long-term transportation funding solution all combined to keep this issue in the top ten in 2015.

Source: ATRI, 2015
Driver Distraction

- Increased concern about the *rising use of technology in vehicles* by all drivers will likely result in this issue continuing as a top concern in the coming years.
Empty Backhaul

- The issue of empty backhaul has been associated mostly with Florida trucking and rail; however, it is a concern that impacts all modes.

- The Florida Chamber Foundation’s 2010 Trade and Logistics study identified an imbalance of trade flows as one of five challenges facing Florida.
FDOT wants to support and facilitate the deployment of Compressed Natural Gas (CNG)/Liquid Natural Gas (LNG) use for **hub logistics and long-haul trucking** in collaboration with the Florida Department of Agriculture and Consumer Services (DACS).
Regulatory Consistency/Harmonization with Neighboring States

- Need to identify potential barriers to competition due to **inconsistency in regulations**
- Can lead to loopholes and unnecessary delays when regulations don’t match across a single truck route

Source: FMTP, 2014
Truck Size and Weight

- The permitting of overweight trucks is a complex highway issue which also impacts other modes.
- Trucks carrying a “non-divisible” load may be issued an overweight permit by a state for weights above the federally mandated 80,000-pound gross vehicle weight (GVW) limit for travel.

Source: FMTP, 2014
Technology Implementation

- Increased automation, real-time routing, and data analytics could optimize logistics decisions further.
- Container ships, air freighters, trucks, and railcars continue to evolve in size, speed, and fuel efficiency.
- Breakthroughs that are still ahead, such as self-guided transport vehicles or automated freight shuttles could disrupt current logistics patterns.
Last Mile Connectivity

- The last leg of a supply chain is often the least efficient, especially when deliveries occur in urban areas, which can contribute to significant congestion and safety problems.

- Planning for efficient goods movement requires a supply chain perspective, and often includes a combination of solutions.
Data

- The production and availability of appropriate data is fundamental to the ability to address a variety of challenges facing the public and private organizations involved in the movement of freight.

- The growth of high-speed networks, proliferation of mobile devices, advances in sensors, video and analytics are all trends creating a dynamic and growing market for ITS.
MOTOR CARRIER SYSTEM PLAN

Facilitated Discussion
Facilitated Discussion

- Validate and Identify Issues
  - Are these appropriate issues to include in the Motor Carrier System Plan?
  - What else are we missing?
Summary Of Identified Motor Carrier Issues

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Sources: ATRI, 2015, Freight Mobility and Trade Plan, FDOT, 2014, Motor Carrier Working Group
Next Steps

- Issues Category Framework
  - How should we group these issues to begin to craft goals, objectives, and strategies?

- Tentative components:
  - Asset Protection (Compliance/Size and Weight)
  - Safety
  - Mobility/Competitive Advantage
Closing Comments

- Questions?
MOTOR CARRIER SYSTEM PLAN

Business Forum 1
January 21, 2015  |  Pensacola, FL