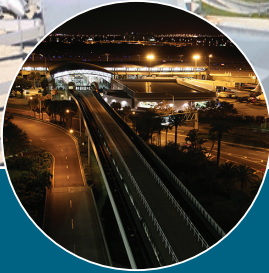


EXECUTIVE SUMMARY



2012 AIRPORT MASTER PLAN UPDATE

BOARD APPROVAL DATE: APRIL 4, 2013

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1 Background

This Executive Summary is intended to provide a macro-level overview of the findings and recommendations developed in the Master Plan Update.

The Hillsborough County Aviation Authority (HCAA) initiated the Airport Master Plan Update (AMPU) process in November, 2011 for Tampa International Airport (TPA). The purpose of updating the Master Plan is to provide the Authority with a refreshed blueprint for short- (five-year), intermediate- (10-year), and long-term (20-year) development of the Airport that takes into consideration changes that have occurred since the completion of the last AMPU completed in 2005. An update to the plan is due as a result of major changes in the economic climate that occurred shortly after the completion of the previous planning effort significantly impacting the industry over the last six years. The change in the economic climate was a significant contributor to dynamic changes that have taken place in the aviation industry and particularly in the commercial airline segment of the industry. The successful completion of this update is the result of an intensive and collaborative effort among stakeholders, which included HCAA, the Federal Aviation Administration (FAA), airport tenants, and the public. The HCAA Board adopted and approved the AMPU on April 4th, 2013.

Recent Events

Since the completion of the 2005 Master Plan the most significant global recession since the Great Depression occurred beginning in late 2007 and lasting through the second quarter of 2009. The recovery from the collapse of the housing market and financial services industry has been a drawn out and slow process that finally appears to be gaining consistent momentum as of the Spring of 2013. Naturally, this economic decline along with record high fuel prices affected the global health of the aviation industry and subsequent levels of passenger demand and airline services provided. Aviation activity at TPA was also affected with a sharp drop in the level of passenger activity that contributed to the HCAA's desire to re-evaluate the development plan that was drafted during the last effort. The 2012 Master Plan Update effort was undertaken to take a refocused look at TPA with emphasis on maximizing the capacity and longevity of the existing main terminal facilities while ensuring that the high level of service for which TPA is known is not diminished. The Master Plan process and report are shaped around this general theme.

Guiding Principles

- Consider economic and airline business industry conditions
- Grow efficiently, thoughtfully and affordably
 - Flexible and Scalable - build only when needed
 - Maximize capacity of existing facilities to reduce need for north terminal past 25 Million Annual Passengers (MAP)
- Maintain a high level of customer service
- Adhere to core aspects of the original terminal design
 - Maintain passenger convenience and comfort
 - Keep walking distances under 700 ft.
 - Expandable
 - Maintain automated people mover concepts
- Grow business and create new revenue opportunities

Visit TPA's Web site at www.tampaairport.com to view the full master plan, PowerPoint presentations, meeting summaries and related reports.



The 2012 Master Plan Update effort was undertaken to take a refocused look at TPA with emphasis on maximizing the capacity and longevity of the existing main terminal facilities while maintaining the high level of service which TPA is known for.



2 Focus

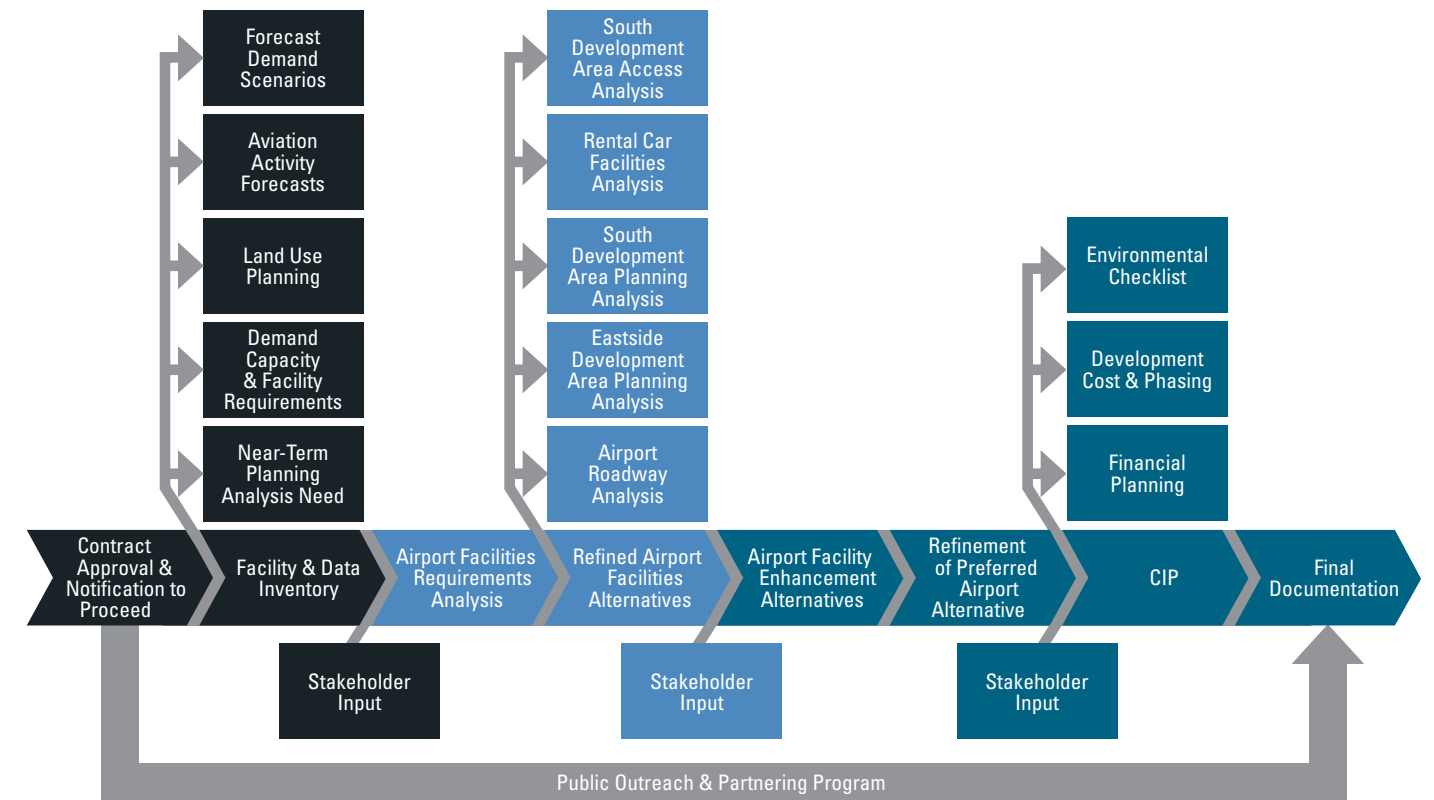
The emphasis of this Master Plan Update is on the following elements:

- Prepare new airport activity projections taking into consideration the impact of the economic recession, consolidations in the airline industry and actions to enhance international service at TPA.
- Use projections to evaluate facility capacity with a specific focus on terminal and passenger processing.
 - Main Terminal
 - Airside Terminals
 - Rental Car Facilities
 - Parking and Curbside Functions
 - International Terminal Facilities
- Evaluate the potential benefits of Shared Use Passenger Processing technologies and their ability to enhance the operational efficiency and capacity of existing Main Terminal functions and facilities.
- Conduct a detailed assessment of the Main Terminal Complex to identify reasonable and viable actions to extend the capacity of terminal facilities beyond the level identified in the 2005 Master Plan (25 MAP) and delay the need to initiate the development of the North Terminal while maintaining high levels and standards of service.
- Evaluate highest and best aviation and/or terminal support use of real estate in the:
 - South Development Area
 - Eastside Development Area
 - North Terminal Expansion Area
 - Perimeter Parcels
- Identify and evaluate an intra-airport transportation corridor.
 - Identify options for connecting to regional transportation systems in the near term and long-term.
- Ensure the continued provision of the high level of service for which Tampa International Airport has been consistently recognized.

One element that is not a primary focus of the 2012 master planning effort is the re-evaluation of airfield alternatives that were prepared under the 2005 Master Plan. It was determined that the configurations of airfield recommendations from the 2005 Master Plan remained valid and should be carried forward to be constructed when needed. The one exception to this was the proposed extension of Runway 10-28, which was identified for re-evaluation.

Airport Master Plan Process

The figure below shows the master plan workflow for the 2012 Update.



The approach undertaken satisfies the technical requirements and master planning guidelines established by the Federal Aviation Administration (FAA) in Advisory Circular 150/5070-6B, Airport master Plans.

The technical reports prepared as part of the Master Plan Update contain the sources of data collected, updated information, assumptions, detailed information about the technical analyses and simulation modeling, and the resultant findings and conclusions that formed the basis of the Master Plan Update recommendations.



Aviation activity at Tampa International Airport is forecast to return to its historical 2007 passenger peak by 2016 and then continue growing.

3 Forecast

Since the 2005 Master Plan Update, aviation has been buffeted by a series of extraordinary events, including one of the most severe recessions in history, record-high fuel prices, and major consolidation in the airline industry. These changes have greatly affected TPA, both in the timing of future facility improvements, and the Airport's ability to finance these improvements. As a result, the previous projections needed to be updated to properly assess these impacts.

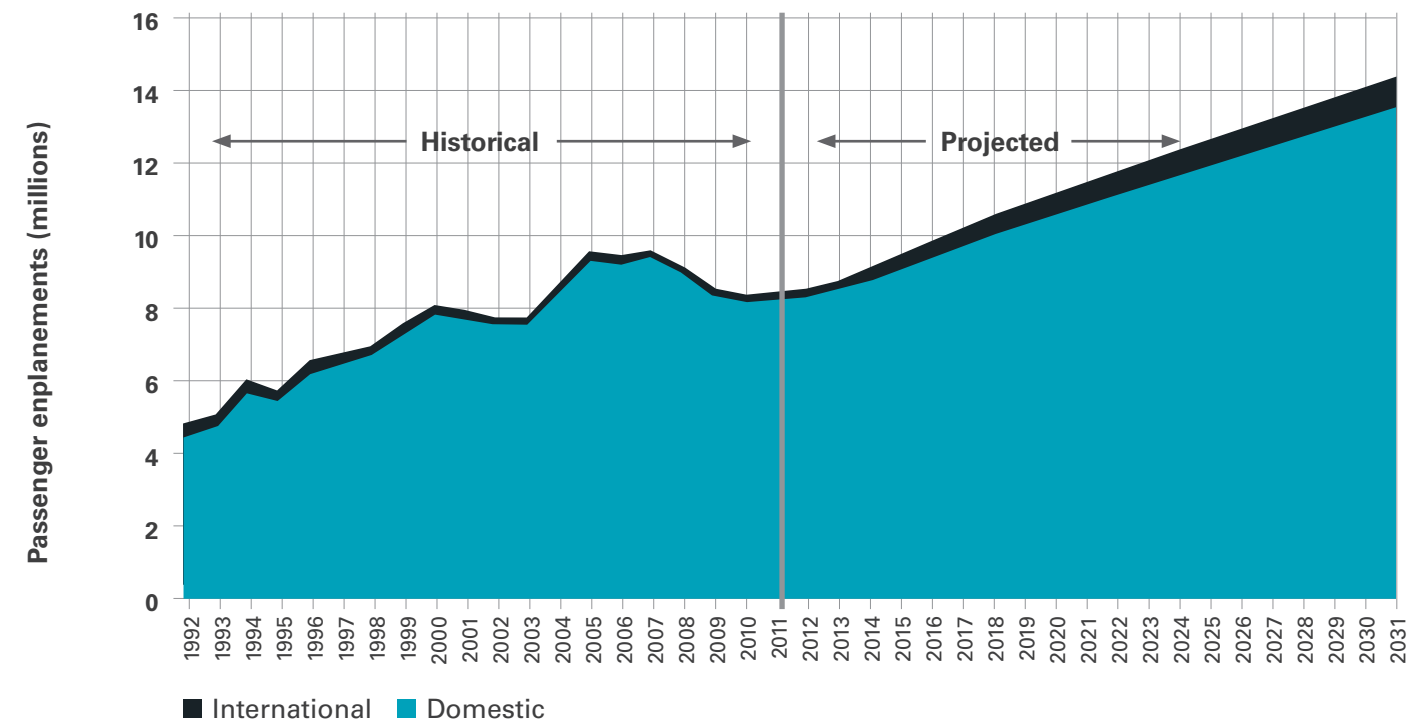
The purpose of these forecasts is to project future aviation activity levels to establish current facility requirements, identify future capacity shortfalls, estimate timing and cost of future improvements, assess potential supply shortfalls, calculate future costs, estimate future revenue streams, and measure and enhance the overall benefit of aviation to the local economy.

The forecasts cover a broad range of activity, including domestic and international passenger enplanements, cargo tonnage, and aircraft operations by activity category and aircraft types. Forecasts were prepared on both an annual basis, and for the peak periods which are used to plan the optimal size of airport facilities.

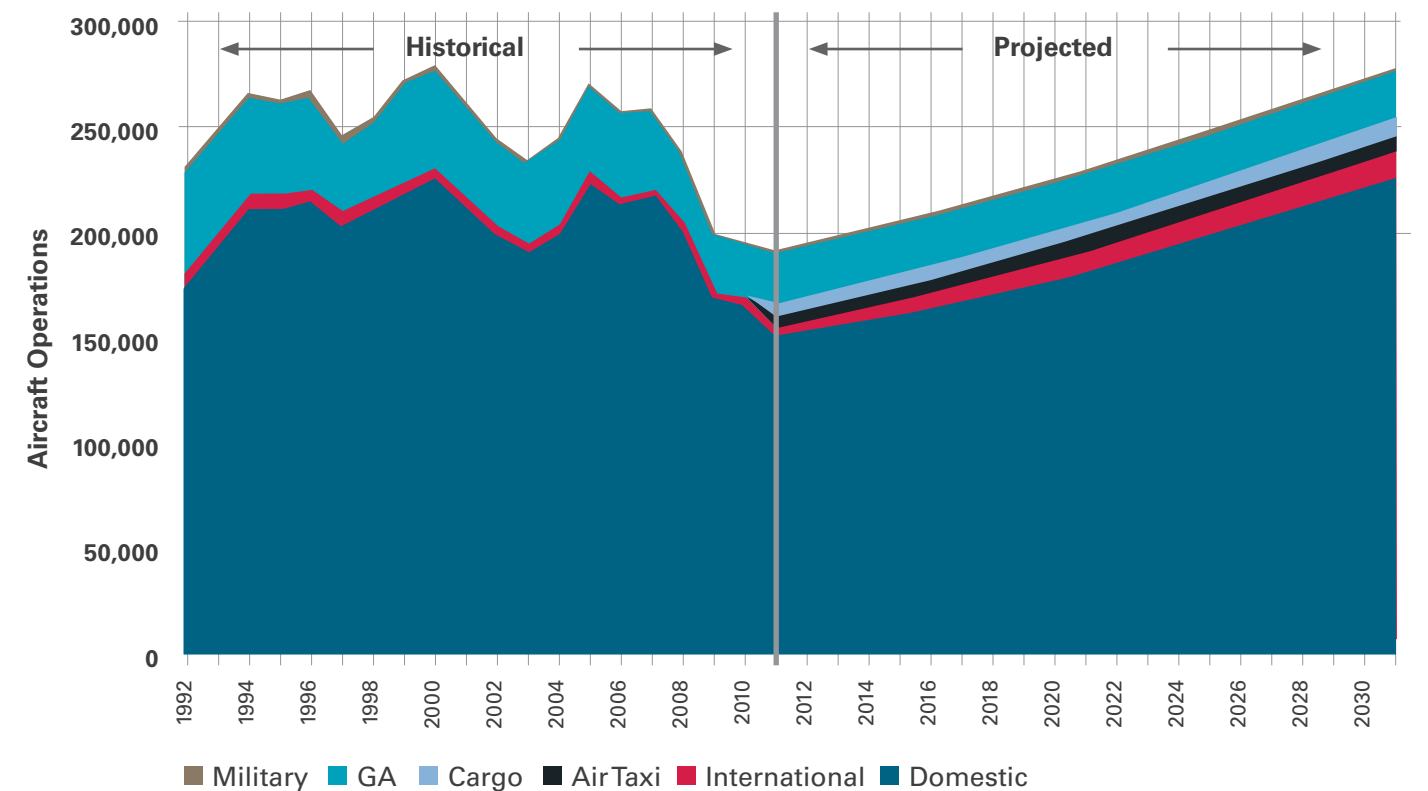
Passenger enplanements are forecast to grow 2.71 percent annually to 14.3 Million Annual Passengers (MAP) by 2031, and international enplanements are projected to grow more quickly than domestic enplanements. This section summarizes the forecast of aircraft operations. Overall, international passenger aircraft operations are projected to grow the fastest and general aviation operations the least. Total operations are forecast to increase 1.87 percent annually from 191,315 in 2011 to 277,040 in 2031. By 2031, total operations are projected to return to the levels experienced in 2000 and 2005. Much of the recent drop in aircraft operations has resulted from the withdrawal of smaller commuter aircraft, often replaced by larger aircraft flown less frequently. Consequently, aircraft operations have and are expected to continue to grow less rapidly than passenger enplanements.

Although the forecasts provide a basis for planning, the HCAA must be able to respond to a range of contingencies that could occur, including political and economic changes, technological changes, and changes in the policies of individual airlines. The recommended development program must be flexible enough to accommodate these contingencies. To address these potential changes, three alternative forecast scenarios were selected with the assistance of HCAA staff. The three scenarios were 1) High Economic Growth, 2) Enhanced International Service, and 3) High Fuel Costs Combined with Low Economic Growth. These scenarios were used to help test the airport development concepts to ensure that they were sufficiently flexible to accommodate a wide range of contingencies.

Forecast of Passenger Enplanements

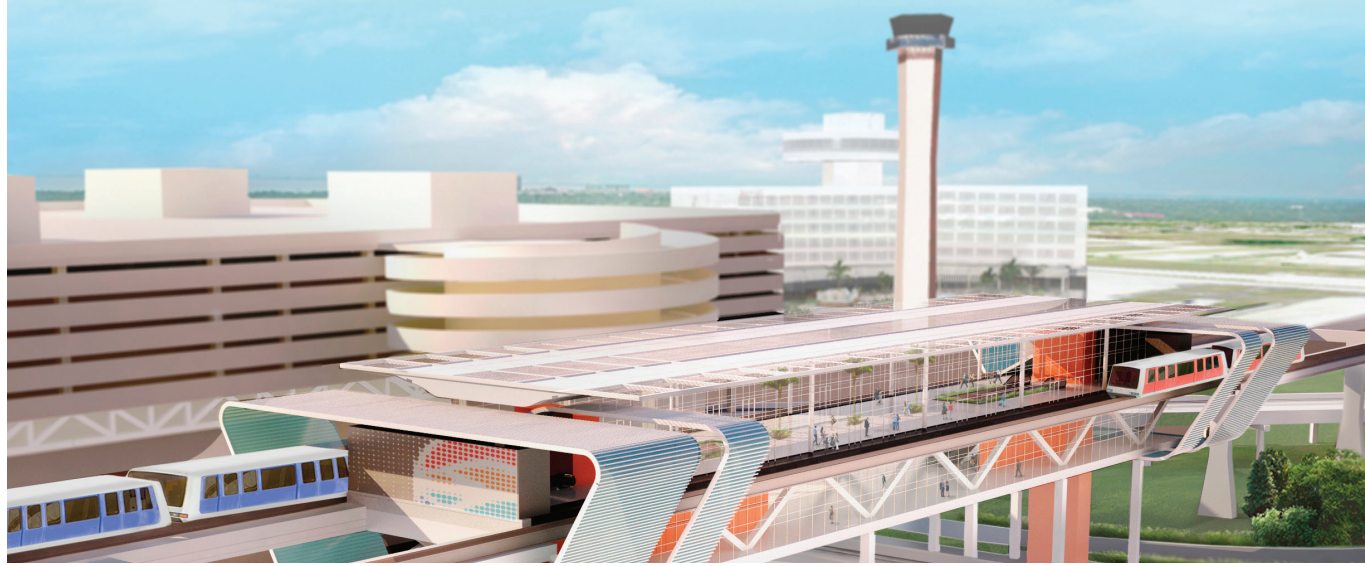


Forecast of Aircraft Operations



Note: Air cargo and AirTaxi included with domestic in historical data.

Proposed APM Station East of the Main Terminal



4 Development Plan

The recommended alternative solves multiple issues within the existing terminal complex while deferring the need to construct a new North Terminal Complex. This concept extends the life of the existing terminal complex through the end of the planning period by maximizing the use of space in and around the existing terminal and airside while maintaining a high level of customer service.

Terminal

The northward expansion of the main terminal provides space for a consolidated security screening checkpoint and a new Customs and Border Protection (CBP) facility, both serving Airside C and a new Airside D. The new checkpoint optimizes TSA operations, increases non-aeronautical revenue opportunities by exposing passengers to more landside concessions, allows passengers the flexibility to transfer between flights on Airside C and D without rescreening, and frees up space at each airside for an enhanced concessions experience.

The east and west expansion of the transfer level is needed to relieve congestion and provide sufficient capacity during peak periods. Expanding over the plaza decks and relocation of the shuttle stations will provide sufficient capacity during peak periods while maintaining a high level of customer service.

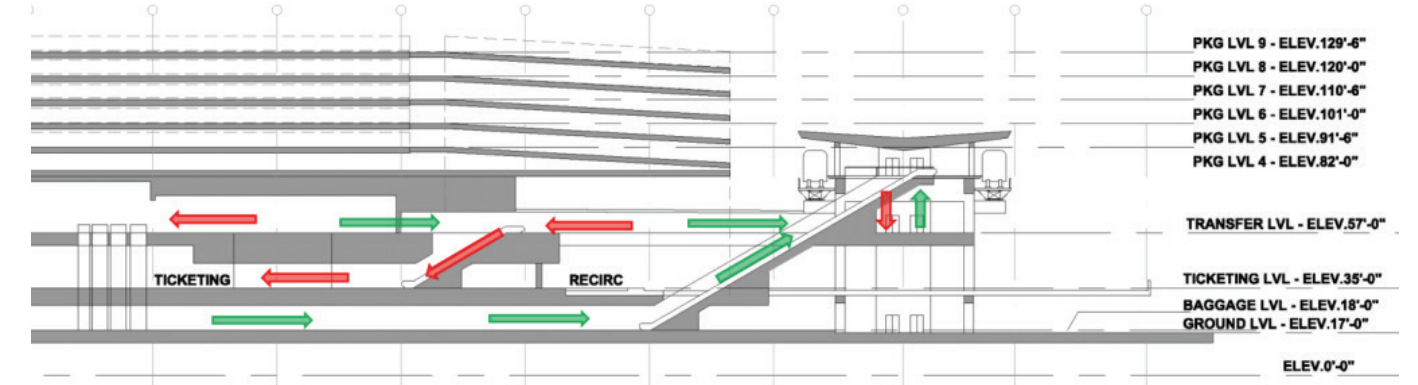
Proposed Automated People Mover

A new Automated People Mover (APM) Train Station is located on the east side of the terminal and connects passengers to the economy parking garage, new consolidated rental car facility, and commercial development such as hotels and offices that may be constructed in the South Terminal Support Area. The APM can be extended both north and south. In the south it could be extended to the proposed regional multimodal transportation center located in the adjacent business district to the Airport. In the north it could be extended to connect to a future North Terminal Complex.

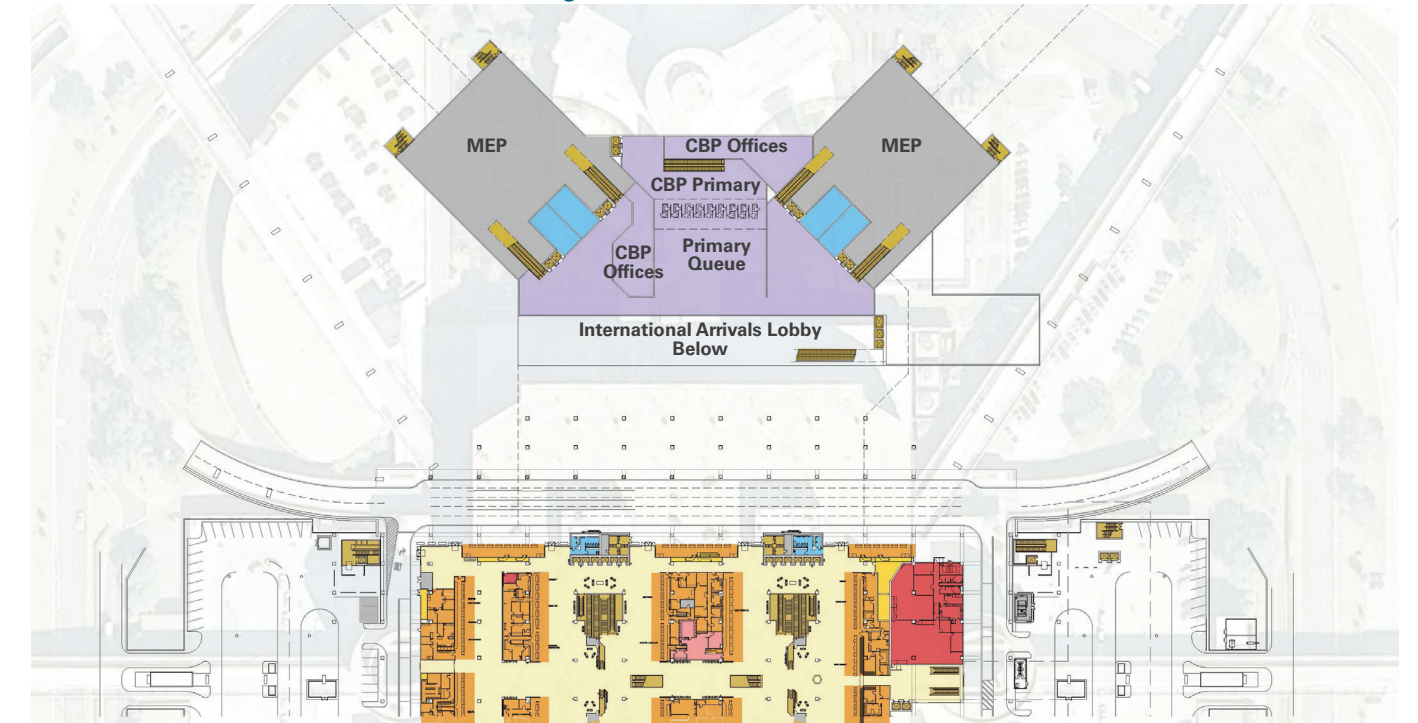
Proposed Customs and Border Protection

A new Customs and Border Protection facility serves international flights arriving at either Airside C or a new Airside D. Passengers descend escalators and elevators from the sterile shuttle train platform above and flow to Immigration. Once processed, passengers descend another set of escalators or elevators to the International Baggage Claim Level. The baggage claim area is sized for forecasted 28.7 MAP demand, but is arranged such that additional baggage claim devices may be added to the north. Passengers claim their bags and proceed through exit control or CBP Secondary Processing, where Customs and Agriculture inspections occur. The CBP facility exits into the International Arrivals Lobby, where passengers are greeted by their meeter/greeters or find ground transportation. An international arrivals curb, serving privately owned vehicles, is located just south of the lobby. To the west is a commercial vehicle pick-up lot. The east end of the lobby has concessions, restrooms and an escalator and elevator leading up to the Transfer Level where passengers have access to the short and long-term parking garages via elevator and the APM that serves the South Terminal Support Development Area (rental cars, economy parking, hotels, etc.).

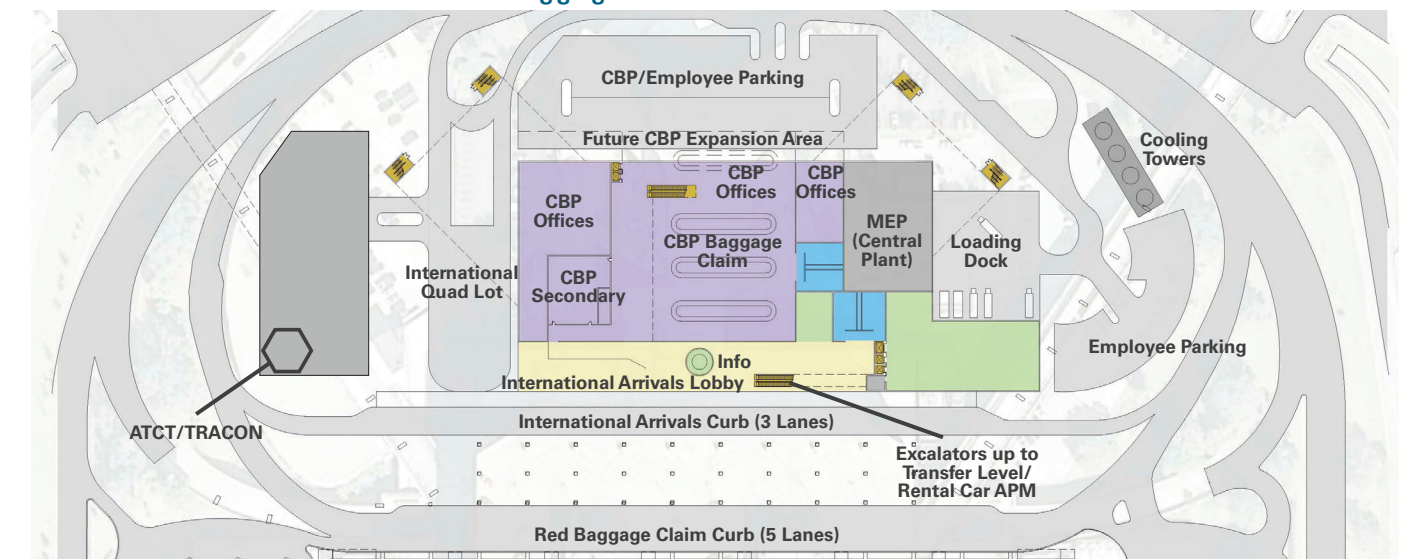
Main Terminal APM Station Cross Section



Customs and Border Protection - Immigration Level



Customs and Border Protection – Baggage Claim Level



Recommended Terminal Development Plan

Reconfigure and expand Airside D ramp

Construct New Airside D with 16 international / domestic gates

Develop new Airside D shuttle

Demolish Red Side Garage

Expand Transfer Level for consolidated C&D security screening checkpoint

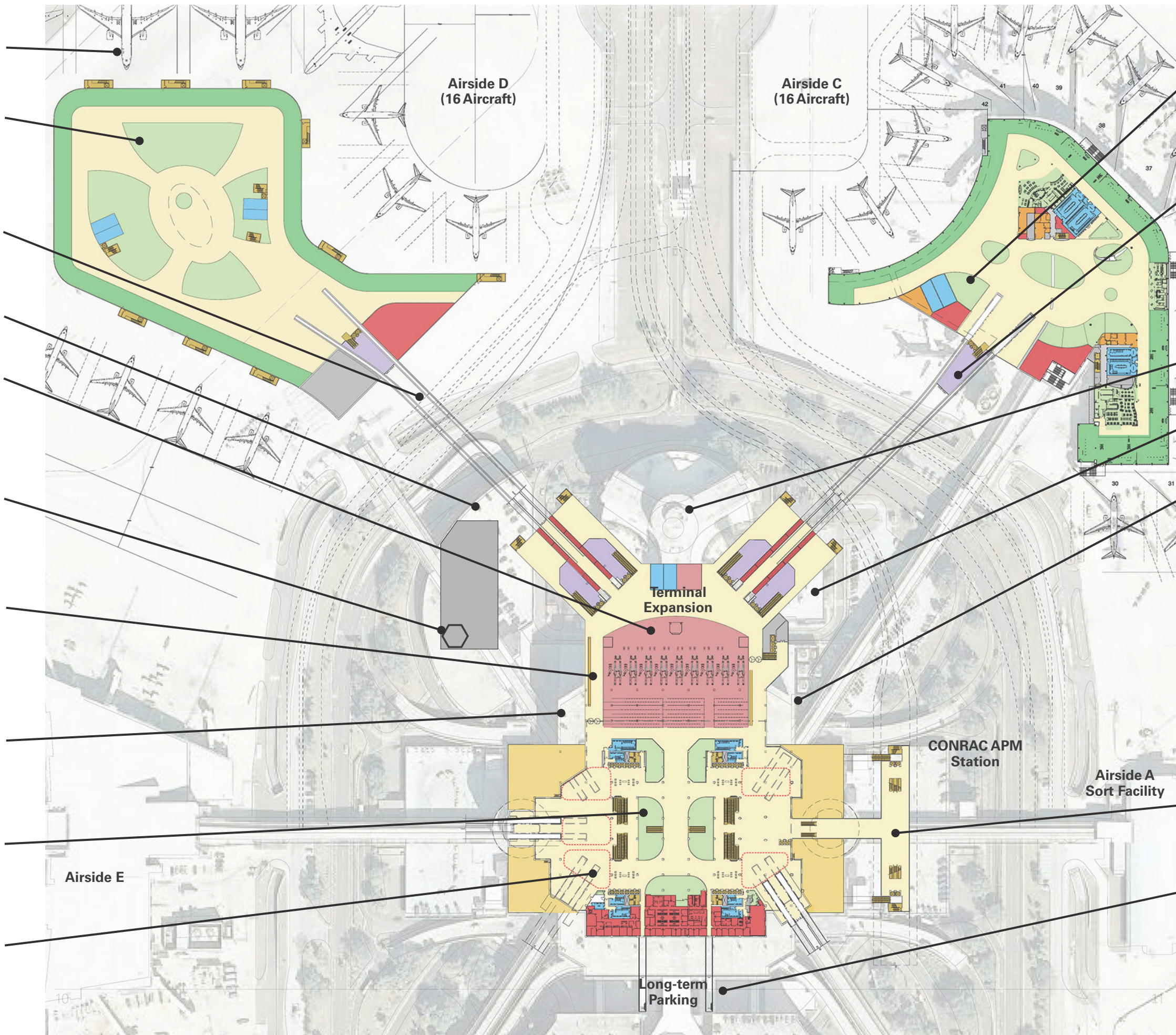
Construct replacement ATCT and TRACON

Add New Customs and Border Protection facility at north end of terminal (below security checkpoint)

Construct International curb for Customs and Border Protection facility at Baggage Claim Level

Expand Transfer Level and redevelop concessions

Implement Phase 1 of Shared Use Passenger Processing System (SUPPS)



Expand Airside C to include reconfigured shuttle train station and additional concessions

Reconfigure Airside C shuttle alignment

Demolish existing Marriott Hotel

Demolish existing ATCT and TRACON

Demolish existing airport service building (Red Side)

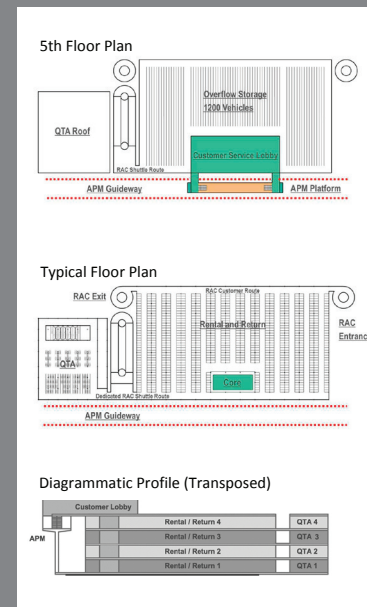
Add temporary truck dock at terminal (not shown)

Construct new central plant chillers and main power reconfiguration (not shown)

Construct new automated people mover (APM) guideway and station

Reclaim Long-Term Parking from former rental car areas in garage

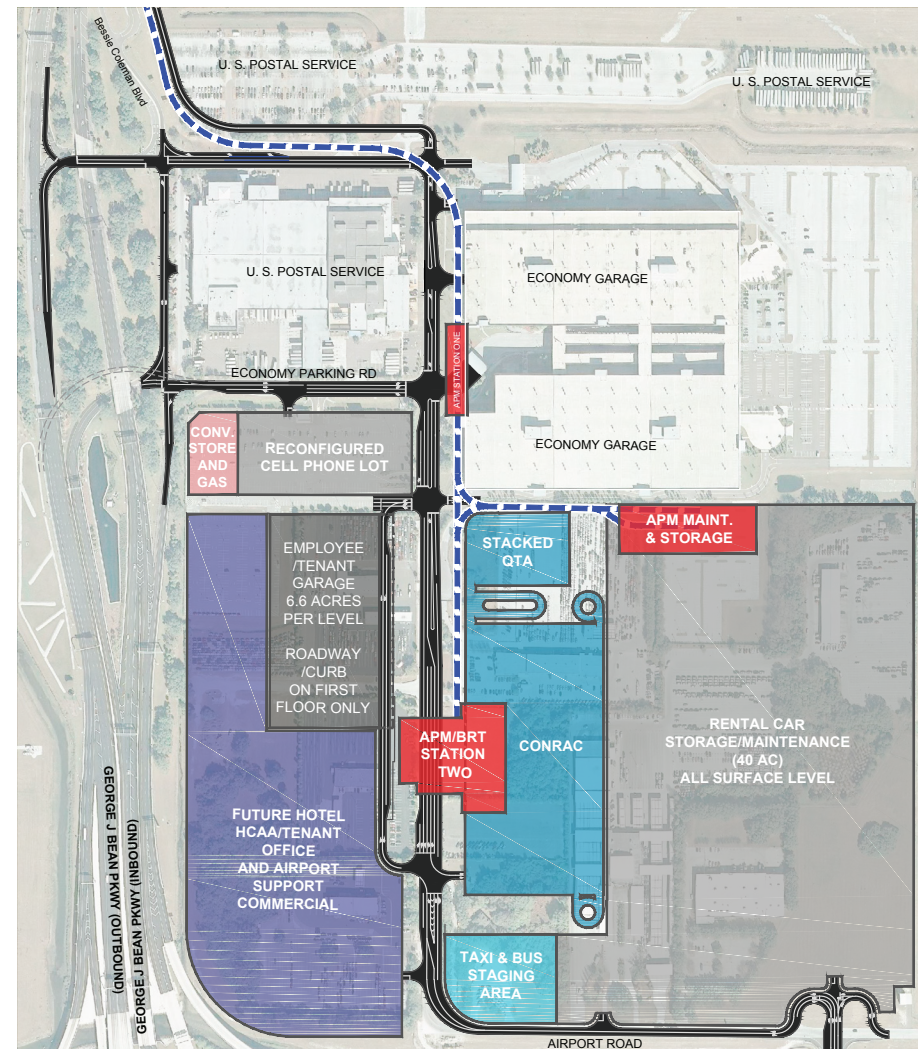
CONRAC Floor Plan



The CONRAC and APM will reduce road congestion on the George Bean Parkway by eliminating 8,500 rental car vehicle trips per day. The projects also eliminate bussing operations from the economy garage and increase capacity of the curbside drive lanes.

5 Tampa Gateway Center

The recommended alternative for the South Terminal Support Development Area aims to extend the capacity of the main terminal by accommodating the relocation of several key terminal support elements.



The proposed elements of the recommended South Terminal Support Development Area are as follows:

Consolidated Rental Car Facility (CONRAC)

Construct and consolidate rental car facilities in a five-level 2.3 million SF CONRAC facility with quick turn-around (QTA) facilities

- 7,300 ready/return/storage and QTA spaces
- Rental car storage and maintenance surface lot and support buildings adjacent to the CONRAC
- Significant improvement in efficiency for rental car operators

Automated People Mover

Connects main terminal to the proposed CONRAC facility.

- 1.3 miles of guideway
- Three stations: Terminal, Economy Garages, CONRAC
- Maintenance /vehicle storage/central control facility
- Remote curb and Bus Rapid Transit station on the ground level of the facility across the Airport Service Road from the CONRAC

Relocated Employee Parking

Construct a 4,100+/- space four to five level parking garage to accommodate employee parking in a location served by the APM.

Airport/Tenant Offices

HCAA offices will be constructed to the west/southwest/south of the proposed employee parking garage. Offices will accommodate HCAA offices that are relocated out of the terminal area. Other office tenants may also be accommodated in this location.

Hotel

A new hotel replaces the existing Marriott, which will ultimately be demolished and replaced with expanded terminal facilities. Additionally, an upscale hotel was identified in the market analysis as being viable.

- The replacement facility provides a high level of service for a higher end hotel conveniently connected to the proposed APM. Final site plan and building design will be determined at a future time.
- The upscale hotel requires a much smaller footprint and could be placed to the west of the Employee Garage and be connected to the APM by a walkway through the garage.

Roadway Improvements

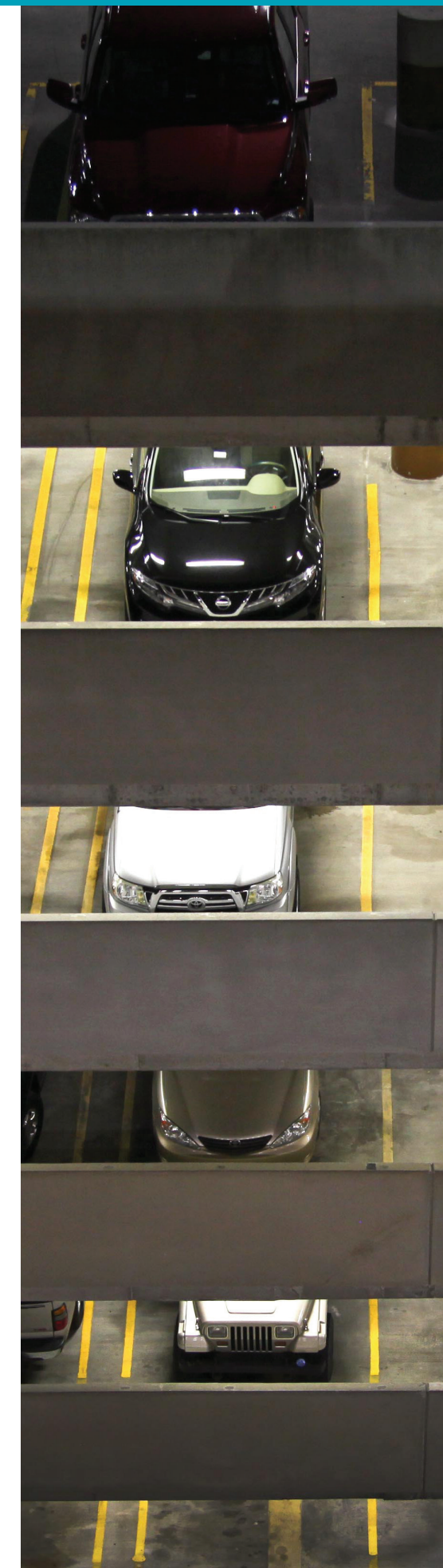
- Airport Service Road, the "spine" road, running north-south through the South Development Area will be widened to a four-lane undivided section with auxiliary lanes for access into the different land uses. At the south end the access road curves to the east and ties into Spruce Street. A three-lane curb roadway will be constructed at the CONRAC APM Station for loading and unloading of customers.
- The Service Road is realigned from the northeast corner of the South Development Area to just north of the ARFF facilities to facilitate access to the ARFF station while accommodating the APM guideway interface from surface to elevation.
- The north access roadway running east-west will be converted to a three-lane section with two westbound lanes and one eastbound lane.
- The south access entry roadway running east-west will be a two-lane section with all traffic travelling eastbound.

Gas Station and Convenience Store

Approximately one acre has been reserved for a gas station and convenience store providing much needed on-airport refueling capability for customers returning rental cars and convenience retail for employees, airport users, meeter greeters waiting in the cell-phone lot and others.

Commercial Development

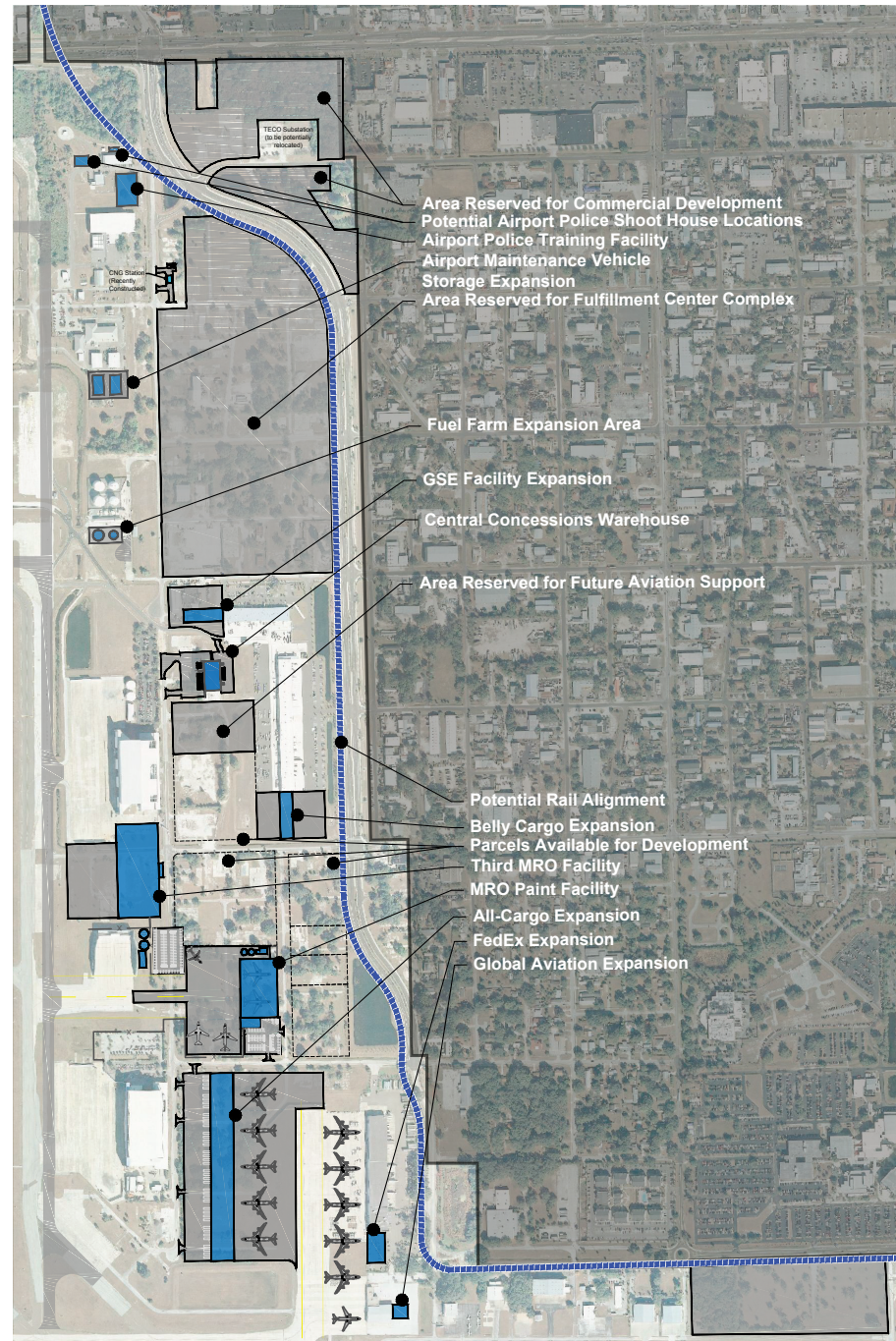
Space has been reserved for other potential commercial development, such as stand-alone restaurants in support of moderate to upscale hotels, pet boarding facilities or bank branches. These facilities will serve the large number of people including airport employees, hotel guests, airport tenants and their employees, passengers and persons coming to the Airport to meet visitors either in the cell phone lot or at the remote curb.



6 Eastside Development

The recommended alternative for the Eastside Development Planning Area balances Maintenance, Repair and Overhaul (MRO) services with cargo, fulfillment center, airport support functions, and commercial development. This includes:

- Ability to more than double all-cargo capacity
- A large area to support fulfillment/distribution center operations
- Expansion of essential airport support activities
- An area of commercial use that provides revenue support to the Airport and amenities to those working in the Eastside Aviation Development Area



The Eastside Development Area Plan intends to flexibly balance airport support functions, cargo, MRO and commercial development.

The proposed elements of the recommended Eastside Aviation Development Area Plan are:

Cargo

- 185,000 SF of additional cargo facility with ramp to accommodate five additional 747-400 positions,
- 22,500 SF expansion of the existing FedEx cargo facility, and
- 9,000 SF warehouse expansion of the Global Aviation facility by Global.

Maintenance, Repair and Overhaul (MRO)

- A third MRO hangar facility (170,000+/- SF),
- A fourth airline maintenance/aircraft paint facility (100,000 SF), and
- A cluster of six flex development parcels intended for MRO support businesses.

Fulfillment Center/Just-In-Time Distribution Facility

- A large fulfillment center (400,000 +/- SF) and associated support campus within a 54-acre development site having secure tug access to the Secure Identification Display Area.

Airport Support

- 22,000 SF expansion of GSE facility with supporting secure apron space,
- Expanded airport maintenance equipment storage,
- Expanded airport police training facilities,
- Acreage reserved to provide a site for relocated ARFF Training facility should the need arise,
- Area reserved for expansion of the Airport Fuel Farm, and
- Area to accommodate a 26,000 SF expansion of the existing belly cargo facility and supporting apron.

Flex Development

- Support Commercial parcel east and north of Cargo Road along the south side of Hillsborough Ave.

Roadway and Transit Amenities

- Preservation of area along Cargo Road to accommodate a possible rail transit alignment,
- Improvements to sections of N. Westshore Blvd to accommodate expanded truck usage. (Meet City of Tampa Standard),
- Improvements to sections of West Ohio Street to accommodate expanded truck usage. (Meet City of Tampa Standard),
- Improvements to sections of West Dr. Martin Luther King, Jr. Blvd. to accommodate expanded truck usage. (Meet City of Tampa Standard), and
- Improvements to sections of West Cayuga Street to accommodate expanded truck usage. (Meet City of Tampa Standard).

7 Perimeter Parcels

An assessment of ancillary parcels was conducted as part of the Master Plan Update. The assessment reviewed seven existing tracts of property owned by the Hillsborough County Aviation Authority to determine whether the existing land-use designations were consistent with the planning done as part of the 2012 Master Plan Update. When inconsistent, the assessment recommended revised land-use designations to ensure the highest and best use of land and generate revenue in support of airport operational and development needs.

The recommendations were as follows:

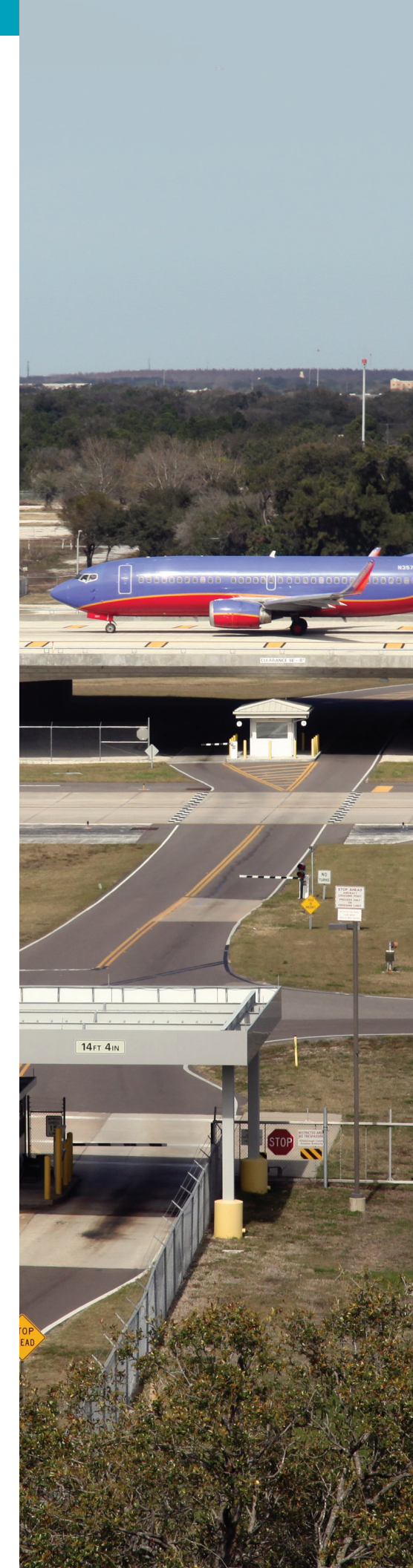
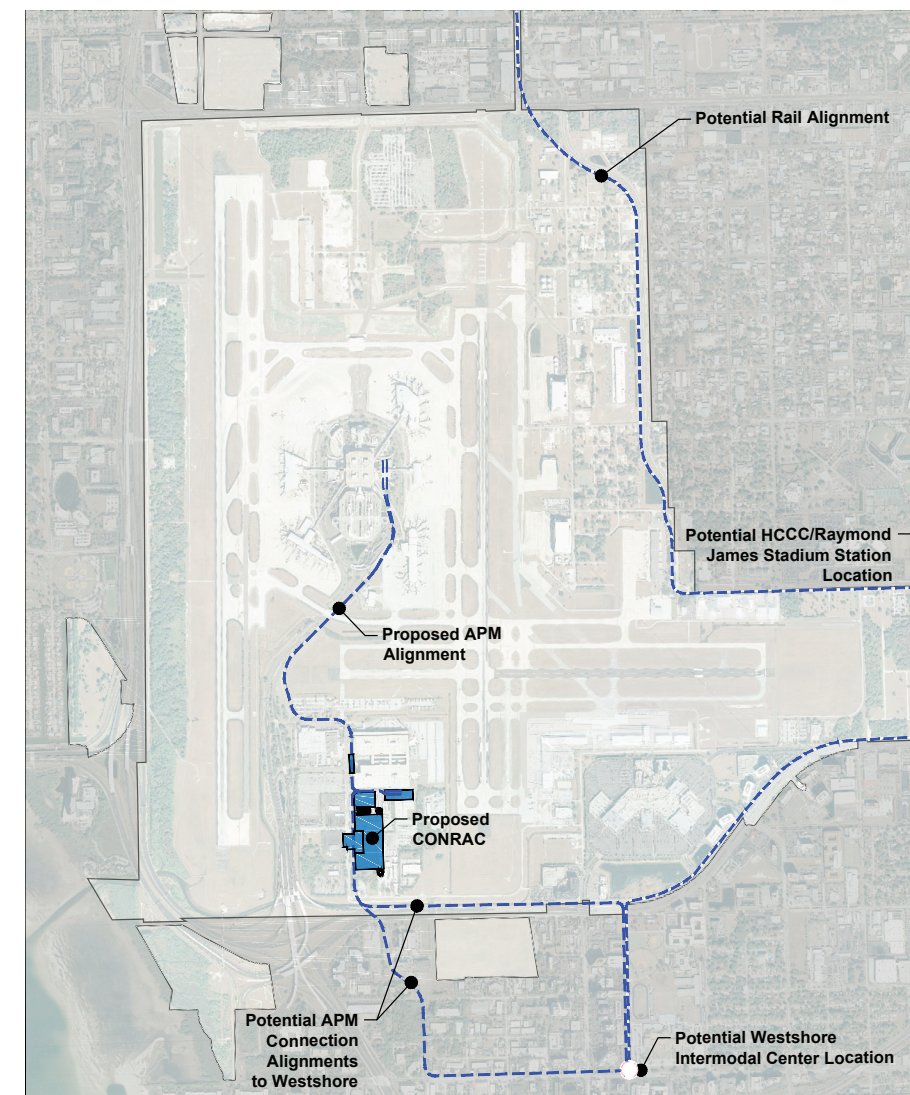
- Parcel 1: Changed from airline passenger terminal to commercial designation
- Parcel 2: Changed from vacant to commercial designation
- Parcel 3: Changed from aircraft operational area, airport/airline support and scenic reserve to commercial designation
- Parcel 4: Changed from airport/airline support to commercial designation.
- Parcel 5: Maintain scenic reserve
- Parcel 6: Maintain designation as commercial land use
- Parcel 7: Changed from scenic reserve and airport/airline support to commercial designation



8 Regional Connections

The concept of interfacing with regional transportation systems, including public transit, has been an element of planning at TPA for many years. The 2005 Master Plan previously depicted a light rail alignment that extended through the center of the Main Terminal complex connecting communities north and northwest of the Airport with the Westshore area and ultimately with Downtown Tampa.

During the 2012 master planning process it was determined that this alignment generated significant challenges to accommodating other essential terminal area improvements. As a result an alternative alignment needed to be considered that would not run through the airport. The airport is working with the Florida Department of Transportation on identifying an alignment from the South Terminal Support Development Area to a multi modal center near I-275 in the Westshore Business district that would provide an easy connection to Pinellas County, downtown Tampa and beyond. The Hillsborough County Metropolitan Planning Organization (MPO) developed a conceptual corridor for reaching communities north of the airport via an alignment around the east side of the Airport. The figure below illustrates this preliminary alignment. It should be noted that the alignment shown is preliminary in nature and is at a level of detail commensurate with the high-level planning conducted in a master plan.



Master Plan Update Proposed Capital Improvement Projects

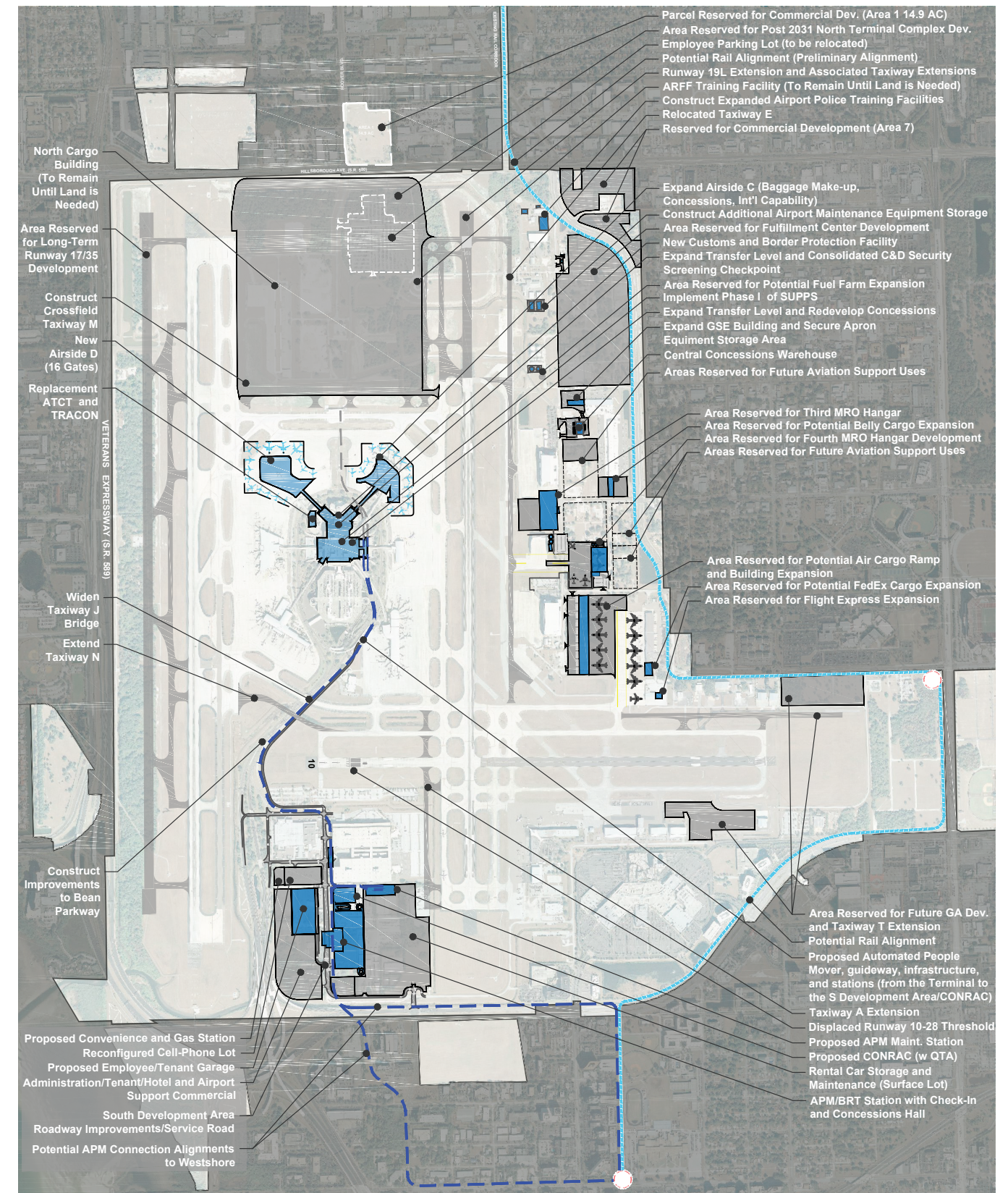
TERMINAL AREA DEVELOPMENT PLAN	TRIGGERS TO BEGIN DESIGN
Expand Transfer Level/Redevelop Concessions	17 - 18 million annual passengers
Implement Phase 1 of Shared-Use Passenger Processing System (SUPPS)	17 - 18 million annual passengers
Air Traffic Control Tower (ATCT) Siting Re-Evaluation	Completion of Master Plan Update
Reclaim Long Term Parking from Former Rental Car Areas in Garage	Action driven by opening of Consolidated Rental Car Facility
Demolish Red Side Garage	Enabling project for Transfer Level Expansion (Consolidated C & D SSCP)
Construct Replacement ATCT/TRACON at Red Side Garage Site	FAA approval and demolition of Red Side Garage Site
Demolish Existing ATCT and TRACON	Action must occur after opening of new ATCT and TRACON facility
Demolish Existing Marriott Hotel	Enabling project for Transfer Level Expansion (Consolidated C & D SSCP)
Demolish Existing Airport Service Building (Red Side)	Enabling project for Transfer Level Expansion (Consolidated C & D SSCP)
Construct New Central Plant Chillers and Main Power Reconfiguration	Enabling project for Transfer Level Expansion (Consolidated C & D SSCP)
Add Temporary Truck Docks for Terminal	Enabling project for Transfer Level Expansion (Consolidated C & D SSCP)
Expand Transfer Level for Consolidated C & D Security Screening Checkpoint	20 - 22 million annual passengers
Expand Airside C to Include Shuttle Alignment	20 - 22 million annual passengers
New Airside D	22 - 24 million annual passengers
Construct Improvements to Bean Parkway to Meet Demand	25 - 27 million annual passengers
SOUTH TERMINAL SUPPORT DEVELOPMENT PLAN	
Automated People Mover, Guideway, Infrastructure and Stations	17 - 19 million annual passengers
Consolidated Rental Car Facility (CONRAC)	17 - 19 million annual passengers
South Development Area Roadway Improvements / Service Road	17 - 19 million annual passengers
Employee Parking Garage in South Development Area	Additional employee parking is required by 2021. Design should begin upon completion of the CONRAC APM
Construct New Administration/Tenant Building in South Development Area	Enabling project for Transfer Level Expansion (Consolidated C & D SSCP)
EAST SIDE DEVELOPMENT PLAN	
New Central Concessions Warehouse	16 - 18 million annual passengers
Construct Additional Airport Maintenance Equipment Storage Space	2016 - 2018 timeframe, depending on maintenance needs or demand
Expand GSE Secure Apron Equipment Storage Area	Based on tenant needs or demand
Construct Third MRO Hangar	Based on tenant needs or demand
Improve Infrastructure for MRO Cluster Area	Based on tenant needs or demand
Additional Equipment Storage Facilities in Airport Maintenance Area	Based on staff needs or demand
Expanded Airport Police Facilities in East Development Area	Based on tenant needs or demand
Construct Fourth MRO Hangar Development.	Based on tenant needs or demand
Construct Extension of Run-Up Taxilane and Ramp to Fourth Hangar Site	Based on tenant needs or demand
Construct Existing Dedicated Cargo Building Expansion	110,000 annual tons
Expand Air Cargo Ramp	New cargo tenant
Expand Belly Cargo Building and Ramp	Based on tenant needs or demand
New Multi-Tenant Air Cargo Building, Phase 1 - 60,000 Sq Ft	New cargo tenant
AIRFIELD	
Widen Taxiway J Bridge	Enabling project for new APM serving Terminal and Consolidated Rental Car Facility
Construct Crossfield Taxiway M	27 - 28 million annual passengers and prior to closing Taxilane A between Airsides C and D
Close and Remove Taxilane A Between Airside C and D	27 - 28 million annual passengers and after completion of Crossfield Taxiway M
Extend Taxiway A to South End of Runway 1R/19L	370,000 operation per year, 37 peak hour arrivals, 34 peak hour departures
Runway 17/35 and Taxiway N Extension	340,000 to 345,000 operations per year
Taxiway E Relocation and Extension	Based on tenant needs or demand

Sources: HNTB analysis

9 Capital Improvement Plan

The Airport facility and infrastructure improvements and expansion alternatives previously summarized represent the overall Master Plan Update recommendations. These are shown in the Recommended Development Plan graphic below.

Recommended Development Plan



Prepared by:

HNTB Corporation

C&S Companies

Cost Management Inc.

Curtis Transportation Consulting

Lea+Elliott

TransSystems

Quest Corporation of America

TransSolutions