

Projections

Total Build-Out Scenarios per Plan Bay Area

In July 2013, ABAG and MTC adopted the Plan Bay Area Final Forecast of Jobs, Population and Housing, which show the expected growth between 2010 and 2040 based on the region's Sustainable Communities Strategy (SCS).

Table 16 shows the forecasts by Plan Bay Area for the areas of West Berkeley, Emeryville, and West Oakland that comprise the EBOTS Area (these are based on Transportation Analysis Zones, or TAZs, which were used to approximate boundaries, as the only practical method to develop forecasts for areas that differ from either city or PDA boundaries).

Table 16: Plan Bay Area Forecasts, 2010-2040

Plan Bay Area Forecasts, 2010-2040				
	West Berkeley (a)	Emeryville (a)	West Oakland (a)	Total
Existing Conditions, 2010				
Population	7,221	10,080	17,902	35,203
Employment	16,349	16,040	8,786	41,175
Housing Units	2,858	5,694	6,795	15,347
Households	2,858	5,694	6,795	15,347
Net New Change, 2010-2040				
Population	2,556	10,960	17,107	30,623
Employment	9,097	7,578	7,720	24,395
Housing Units	1,024	5,922	6,139	13,085
Households	1,024	5,922	6,139	13,085
Total in 2040				
Population	9,777	21,040	35,009	65,826
Employment	25,446	23,618	16,506	65,570
Housing Units	3,882	11,616	12,934	28,432
Households	3,882	11,616	12,934	28,432

Note:

(a) Transportation Analysis Zones (TAZs) were used to approximate the geographies in the EBOT Study Area.

Sources: Plan Bay Area Final Forecast of Jobs, Population and Housing, adopted by ABAG and MTC, July 2013; BAE, 2013.

Because the planning horizons for the three cities in the EBOTS Area go to 2035, the Plan Bay Area forecasts were then calculated for the period 2010 to 2035, using the five-year intervals already calculated in the projections. According to these forecasts, as summarized in Table 17, between 2010 and 2035⁸, the EBOTS Area is expected to add 20,500 net new jobs and 11,000 new housing units, which is similar to the maximum build-out scenarios from the land use plans, which projected 28,600 net new jobs and 10,500 new housing units.

⁸ Plan Bay Area forecasts through 2035 were used to more easily allow comparison with the planning horizons used by the Three Cities.

Table 17: Plan Bay Area Forecasts, 2010-2035

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	West Berkeley (a)	Emeryville (a)	West Oakland (a)	Total
Existing Conditions, 2010				
Population	7,221	10,080	17,902	35,203
Employment	16,349	16,040	8,786	41,175
Housing Units	2,858	5,694	6,795	15,347
Households	2,858	5,694	6,795	15,347
Net New Change, 2010-2035				
Population	2,079	8,959	13,870	24,908
Employment	7,426	6,496	6,530	20,452
Housing Units	849	4,909	5,066	10,824
Households	849	4,909	5,066	10,824
Total in 2035				
Population	9,300	19,039	31,772	60,111
Employment	23,775	22,536	15,316	61,627
Housing Units	3,707	10,603	11,861	26,171
Households	3,707	10,603	11,861	26,171

Note:

(a) Transportation Analysis Zones (TAZs) were used to approximate the geographies in the EBOT Study Area.

Sources: Plan Bay Area Final Forecast of Jobs, Population and Housing, adopted by ABAG and MTC, July 2013; BAE, 2013.

Total Build-Out Scenarios per EBOTS Area Existing Plans

Based on the adopted land use plans of Berkeley, Emeryville, and Oakland, the EBOTS Area is zoned to accommodate 10,500 new housing units between 2010 and 2035, an increase of 51 percent over the 2010 baseline. In West Oakland, zoning will allow up to 5,100 new housing units within the Opportunity Areas, while West Berkeley is zoned to accept 1,650 new units and Emeryville is zoned for another 3,800 new units.

Table 18 shows the maximum build-out scenario based on combined allowances in the West Berkeley Specific Plan, Emeryville General Plan, and the West Oakland Specific Plan, based on adjustments as outlined in the table footnotes. West Oakland has implemented a plan to accommodate the largest share of the new development. Between 2010 and 2035, the entire EBOTS Area will be able to accommodate 8 million square feet of new commercial and industrial development. This represents a significant increase of 26 percent in net new development over the current 2010 baseline. The majority of this potential will be zoned in West Oakland, where 4 million square feet of commercial and industrial will be allowed under the West Oakland Specific Plan. Emeryville and Berkeley are zoned to be able to accommodate 3 million square feet and 1 million square feet, respectively.

Table 18: Maximum Build-Out Based on Existing Specific and General Plans in the EBOTS Area, 2010-2035

Maximum Build Out Based on Existing Specific and General Plans, EBOT Study Area, 2010-2035				
	West Berkeley (b)	Emeryville (c)	West Oakland (d)	Total
Existing Conditions (a)				
Population	7,025	9,727	17,876	34,628
Employment (# jobs)	16,645	20,552	9,770	46,967
Housing Units	7,718	5,988	6,773	20,479
Households	7,718	5,570	6,773	20,061
Building Area (nonresidential sf)	9,881,849	11,890,953	7,975,000	29,747,802
Net New Change, 2010-2035 (e)				
Population	3,777	6,773	11,136	21,686
Employment (# jobs)	4,300	9,448	14,850	28,598
Housing Units	1,651	3,767	5,081	10,499
Households	1,651	3,740	4,949	10,340
Building Area (nonresidential sf)	1,016,000	2,940,000	4,030,000	7,986,000
Total in 2035				
Population	10,802	16,500	29,012	56,314
Employment (# jobs)	20,945	30,000	24,620	75,565
Housing Units	9,369	9,755	11,854	30,978
Households	9,369	9,310	11,722	30,401
Building Area (nonresidential sf)	10,897,849	14,830,953	12,005,000	37,733,802

Notes:

(a) The starting year for each plan varies slightly due to minor differences in the planning period. Existing conditions for the West Berkeley Project assumes a 2010 start year; the City of Emeryville General Plan assumes a 2008 start year, and the West Oakland Specific Plan assumes a 2012 start year. Because the West Oakland Specific Plan only provided data for the Opportunity Areas, BAE pulled data from the US Census in order to show existing conditions in 2010 for all of West Oakland.

(b) Existing conditions and maximum build-out projections are based on the West Berkeley Project Draft EIR No Project Alternative, which represents the scenario without Measure T, which was rejected at the ballot by Berkeley voters.

(c) The maximum build out was taken from the City of Emeryville General Plan Draft EIR dated 2008.

(d) Because the West Oakland Specific Plan EIR was not yet available for review, the build-out scenario was derived from the West Oakland Specific Plan Project Description dated 2012.

(e) Net new change describes the incremental change projected to occur within each plan area.

Sources: City of Emeryville, General Plan Draft EIR, 2008; City of Berkeley, West Berkeley Project Draft EIR, 2010; City of Oakland, West Oakland Specific Plan Project Description, 2012; BAE, 2013.

Between 2010 and 2035, the EBOTS Area is zoned to accommodate another 28,600 new jobs, an increase of 61 percent over the 2010 baseline. Of the three subareas, West Oakland will be zoned to accommodate approximately 15,000 new jobs within the Opportunity Areas defined by the plan, which represents about half of all new jobs slated for the EBOTS Area. In the same time period, Emeryville is zoned to add 9,500 jobs while West Berkeley plans for an additional 4,300 jobs.

It is important to note that these build-out scenarios do not represent projections of what will actually be built between 2010 and 2035, which is a function of the real estate market, and reflect the outside potential of what is allowable under the existing plans.

Comparison Between Plan Bay Area Forecasts and Existing EBOTS Area Land Use Plans

While Plan Bay Area's total forecasts for new housing units for the EBOTS Area align with the growth described in the Specific and General Plans, its total forecast for employment growth is nearly 29 percent lower, or more than 8,100 fewer jobs, compared to the Specific and General Plans. It is

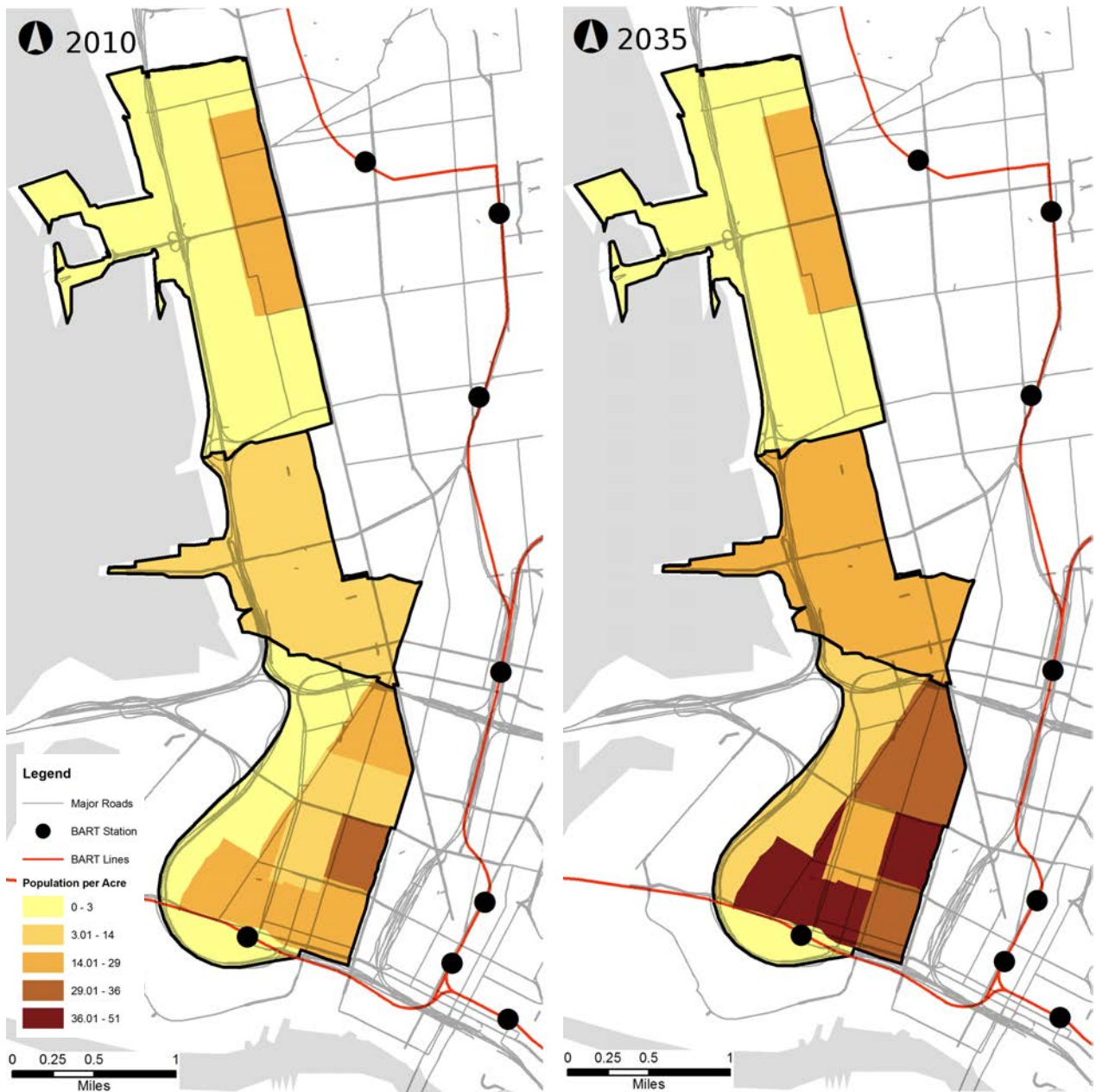
assumed that Plan Bay Area assumptions may account for a greater impact from the 2008 financial crisis and subsequent recession. It should be kept in mind that local economies with significant existing high-tech sectors, such as the EBOTS area, may have considerable variance in future job growth depending upon the pace of technological change and its impact on the economy. Successful planning initiatives also have the potential to “grow” the market, or increase demand above what would be expected based on current trends, such as what the WOSP seeks to do.

Plan Bay Area also allocates growth among the three subregions differently than the Specific and General Plans. While the land use plans showed a significant level of employment occurring in West Oakland, Plan Bay Area forecasts show employment gains mostly in West Berkeley (7,400 net new jobs vs. 4,300 jobs in the West Berkeley Plan), followed by West Oakland (6,500 net new jobs vs. 15,000 jobs in the WOSP) and Emeryville (6,500 net new jobs vs. 9,400 jobs in its General Plan). The largest number of new housing units is expected in West Oakland (5,100 new units, essentially the same as in the WOSP). This is followed by Emeryville (4,900 new units vs. 3,800 in the General Plan), and West Berkeley (800 new units vs. 1,700 in the West Berkeley Plan) – however the net difference between Emeryville and West Berkeley is essentially zero, and with the adjacency of the EBOTS Area housing markets it should be considered that demand that cannot be met in Emeryville may be met in either West Berkeley or West Oakland.

Despite the differences between the land use plans and Plan Bay Area forecasts, the development that occurs in the EBOTS Area will be governed by the local land use plans and policies that are in place, as well as the investment decisions made by developers, tenants, and companies. OneBayArea Grant Program and other MTC funding will be focused on communities that accommodate Regional Housing Needs Allocation figures, as well as in Priority Development Areas.

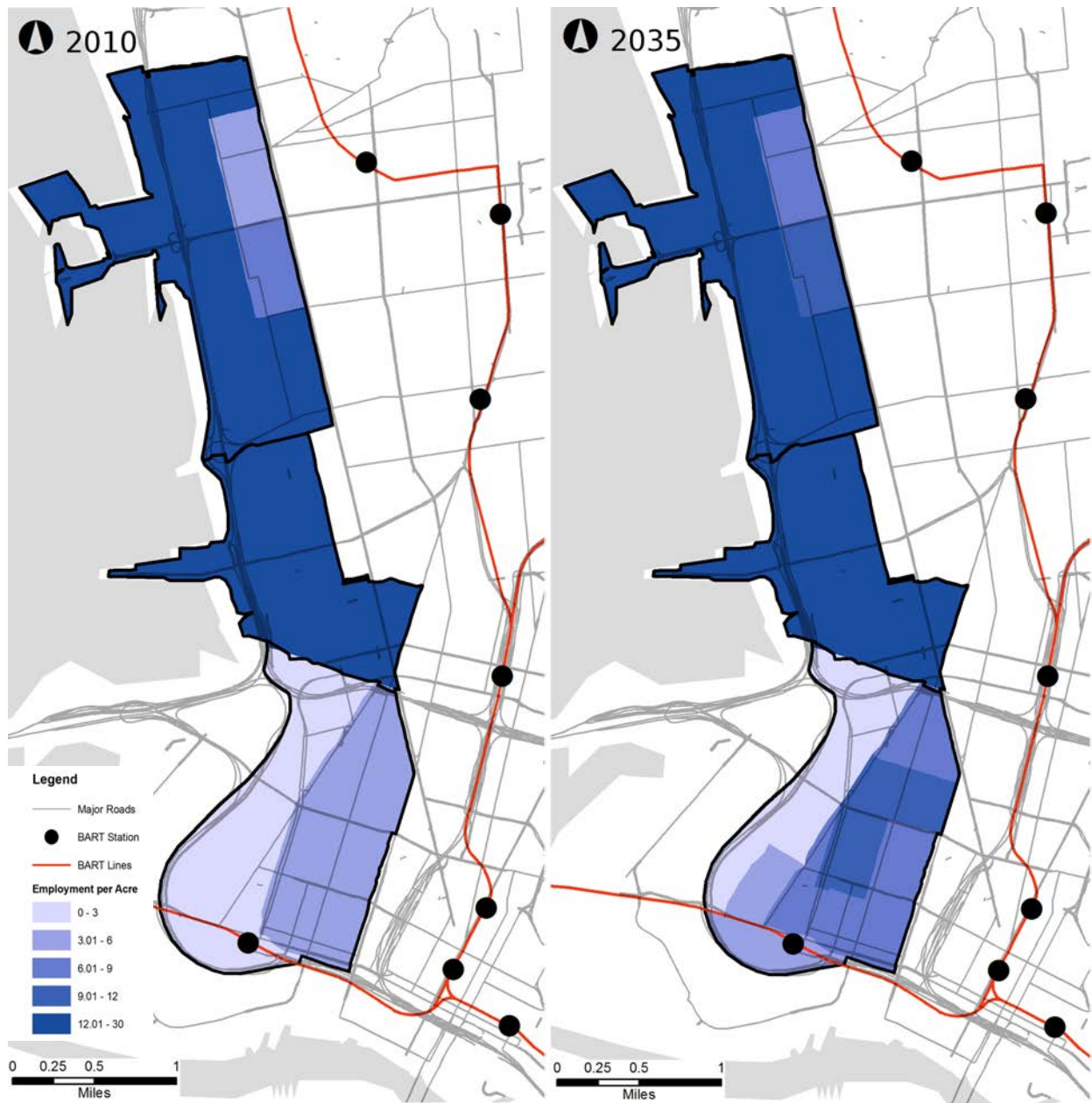
The figures on the following pages depict where growth is expected to occur within the EBOTS Area based on forecasts from Plan Bay Area. The images show population and employment densities per acre in 2010 and 2035 based on TAZ geographies, which vary in geographic size.

Figure 10: Population per Acre, EBOTS Area, 2010-2035



Sources: Plan Bay Area Final Forecast of Jobs, Population, and Housing, adopted by ABAG and MTC July 2013; BAE, 2013.

Figure 11: Employment per Acre, EBOTS Area, 2010-2035



Sources: Plan Bay Area Final Forecast of Jobs, Population, and Housing, adopted by ABAG and MTC July 2013; BAE, 2013.

Opportunity Sites

The precise location of where change will occur depends on multiple factors, including real estate markets; decisions of private developers and landowners; government regulations, plans, and implementation programs; and other supportive initiatives. The figures below illustrate potential opportunity areas within the EBOT corridor, using graphics prepared by each city based on its most recent plans.

Figure 12: Emeryville Opportunity Areas



Figure 13: West Berkeley Opportunity Areas

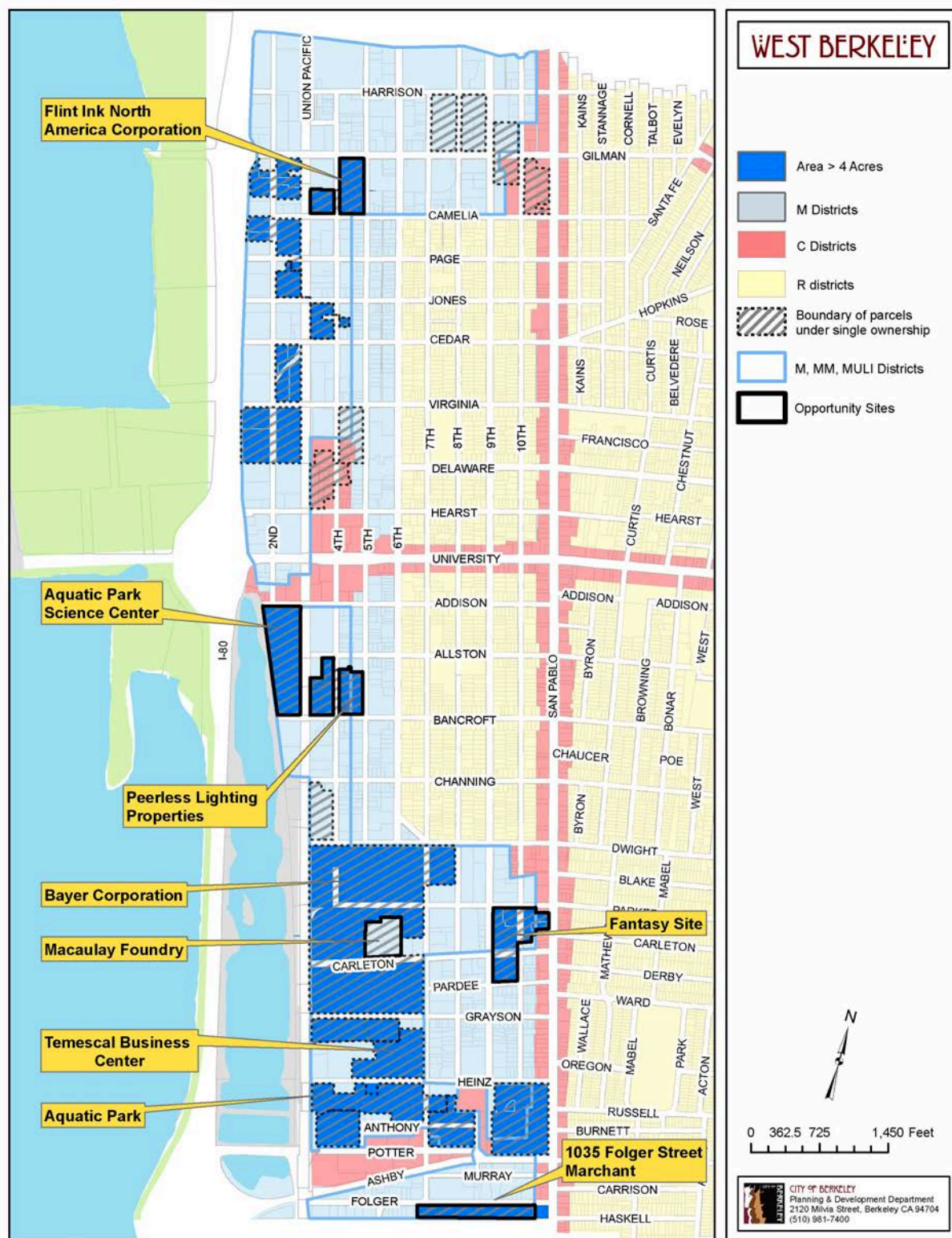


Figure 14: West Oakland Opportunity Areas

