



MONITOR  
REGIONAL COMPETITIVENESS

## Facilitating Competitive Dialogue

*December 16, 2010*

### MONITOR GROUP

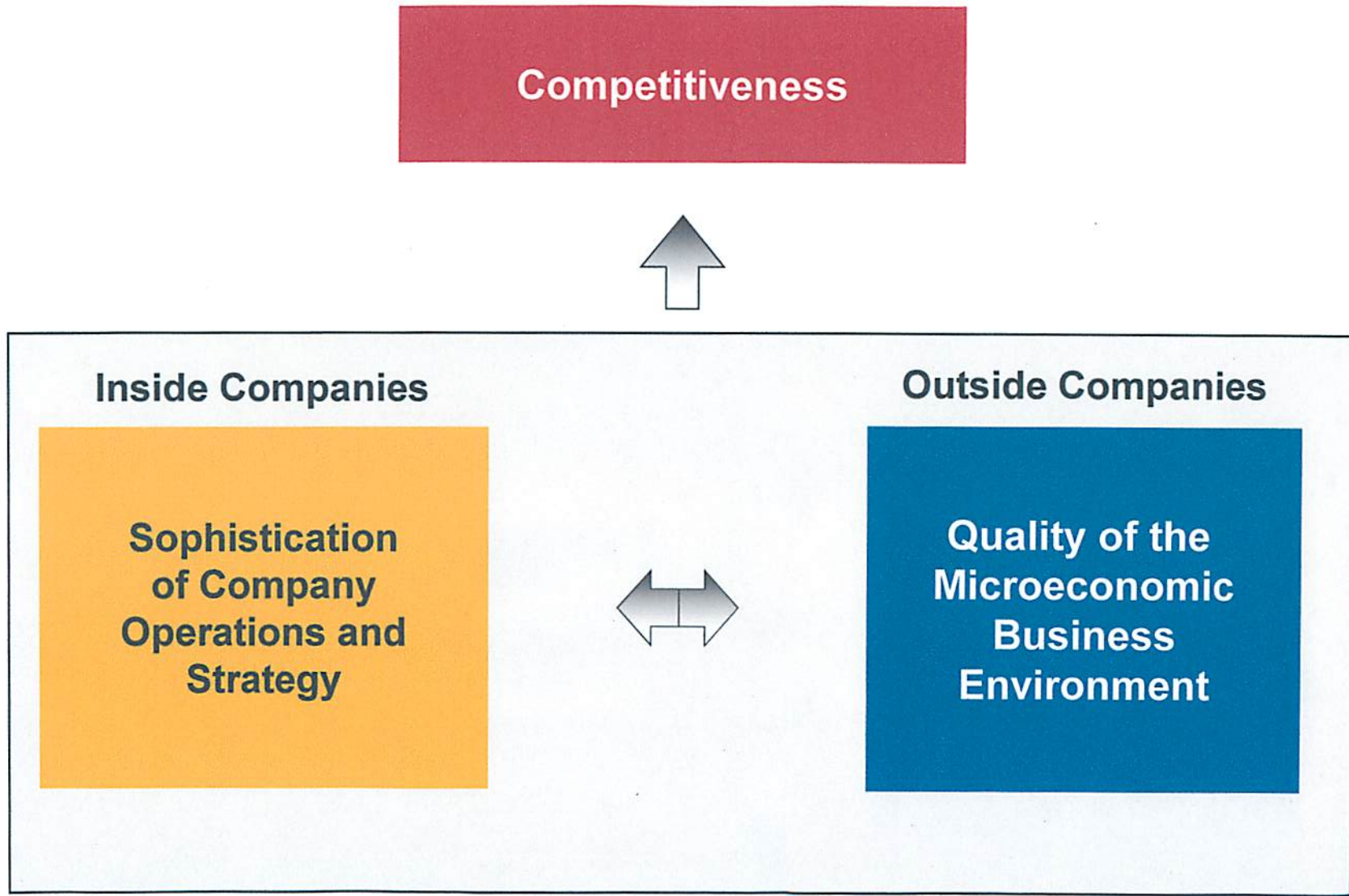
BEIJING CAMBRIDGE CHICAGO DELHI DUBAI FRANKFURT HONG KONG JOHANNESBURG  
LONDON LOS ANGELES MANILA MILAN MOSCOW MUMBAI NEW YORK PALO ALTO PARIS  
SAN FRANCISCO SÃO PAULO SEOUL SHANGHAI SINGAPORE TOKYO TORONTO ZURICH

Copyright © 2010 by Monitor Company Group, L.P.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means — electronic, mechanical, photocopying, recording, or otherwise — without the permission of Monitor Company Group, L.P. This document provides an outline of a presentation and is incomplete without the accompanying oral commentary and discussion.



## Why Monitor is Involved in Regional Competitiveness

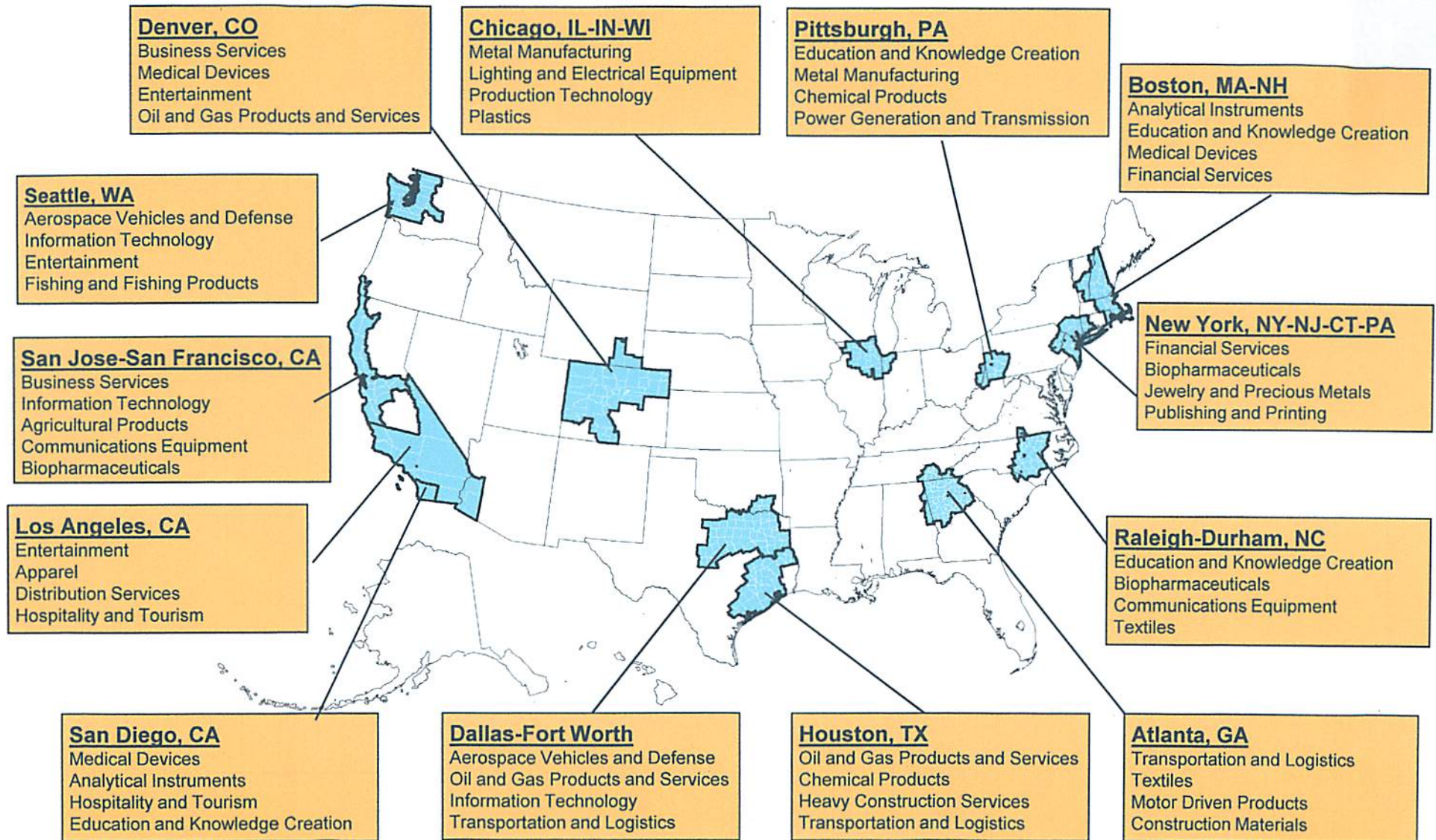






# Specialization of Regional Economies

## Leading Clusters by U.S. Economic Area, 2007

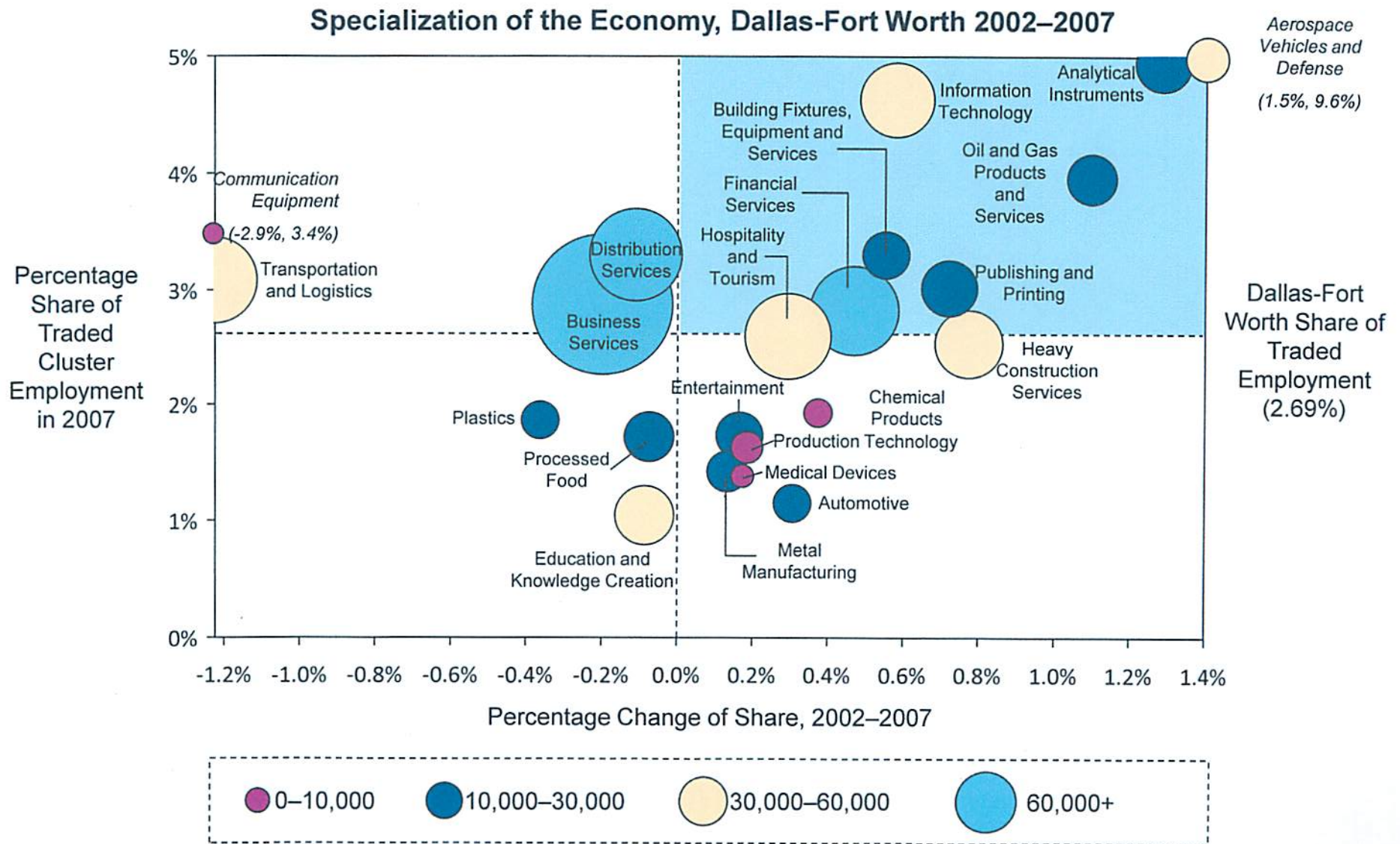


Source: Prof. Michael E. Porter, Cluster Mapping Project, Institute for Strategy and Competitiveness, Harvard Business School; Richard Bryden, Project Director.



# Specialization of the Texas Economy

## Dallas-Fort Worth EA Compared to United States, 2002–2007

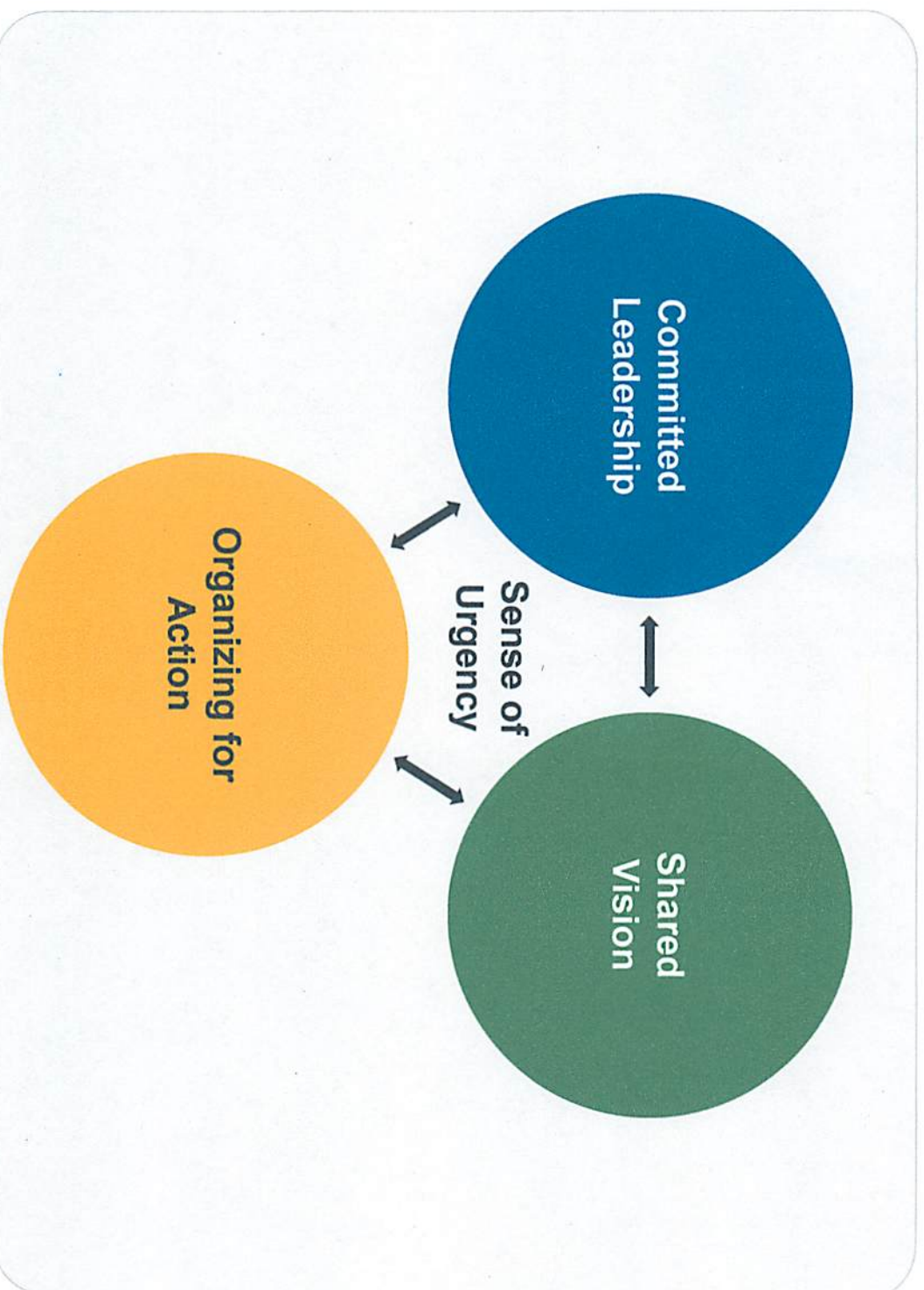






## Creating the Capacity to Act

*In order to effectively promote a cluster-based economic development strategy, four key components must be in place*





# **Transportation and Clusters: Laying the Groundwork for Economic Growth**

A Presentation to the Joint Meeting of the Boston and Cambridge City Councils  
December 16, 2010  
Museum of Science

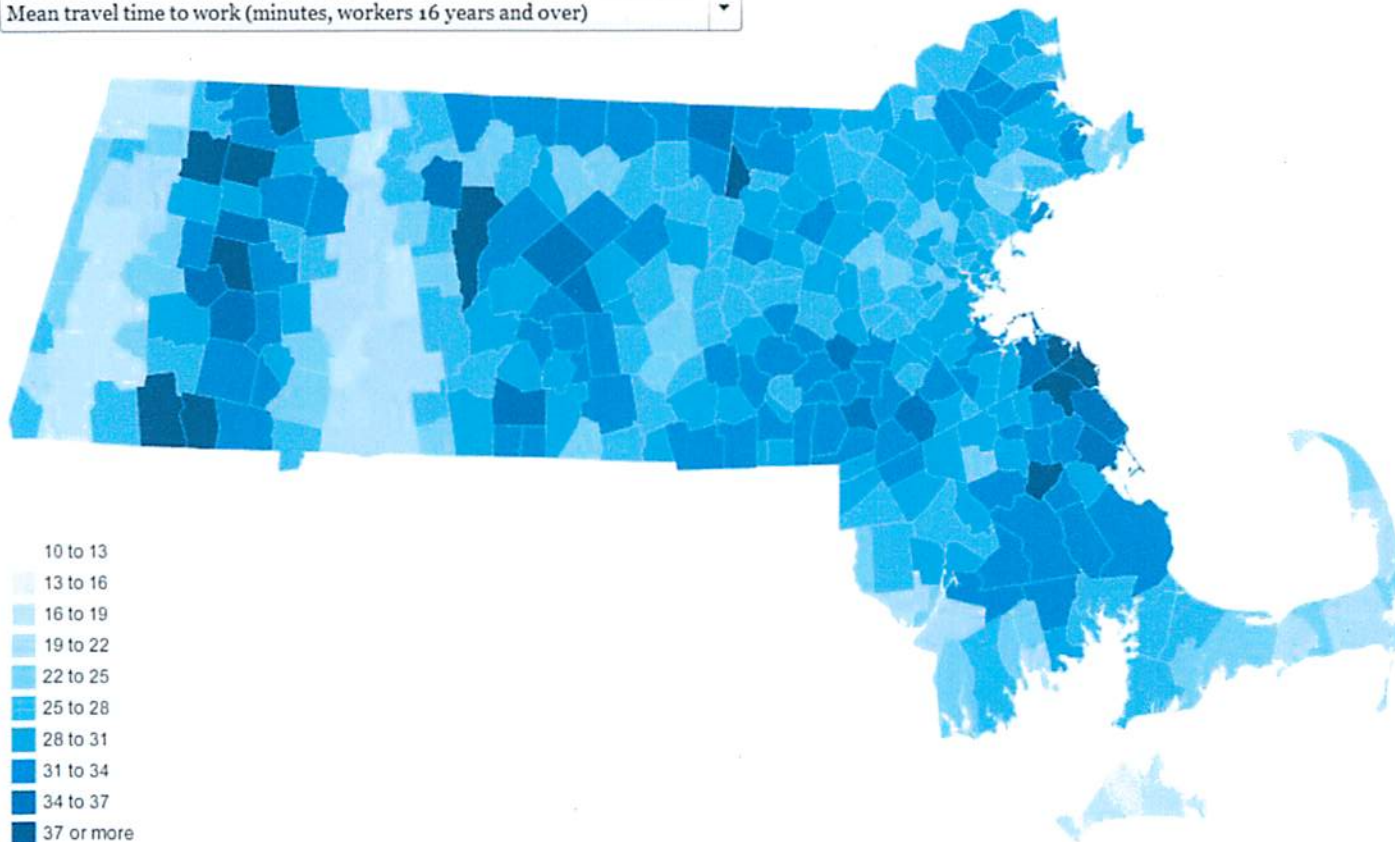


# Massachusetts Commuting Times

## AMERICAN COMMUNITY SURVEY: MASSACHUSETTS MAP

A comparison of select characteristics of Massachusetts communities according to the 2005-2009 American Community Survey.

Mean travel time to work (minutes, workers 16 years and over)



Map: Boston.com

New Census Data:  
Mass. commutes 6<sup>th</sup>  
worst in nation,  
getting longer

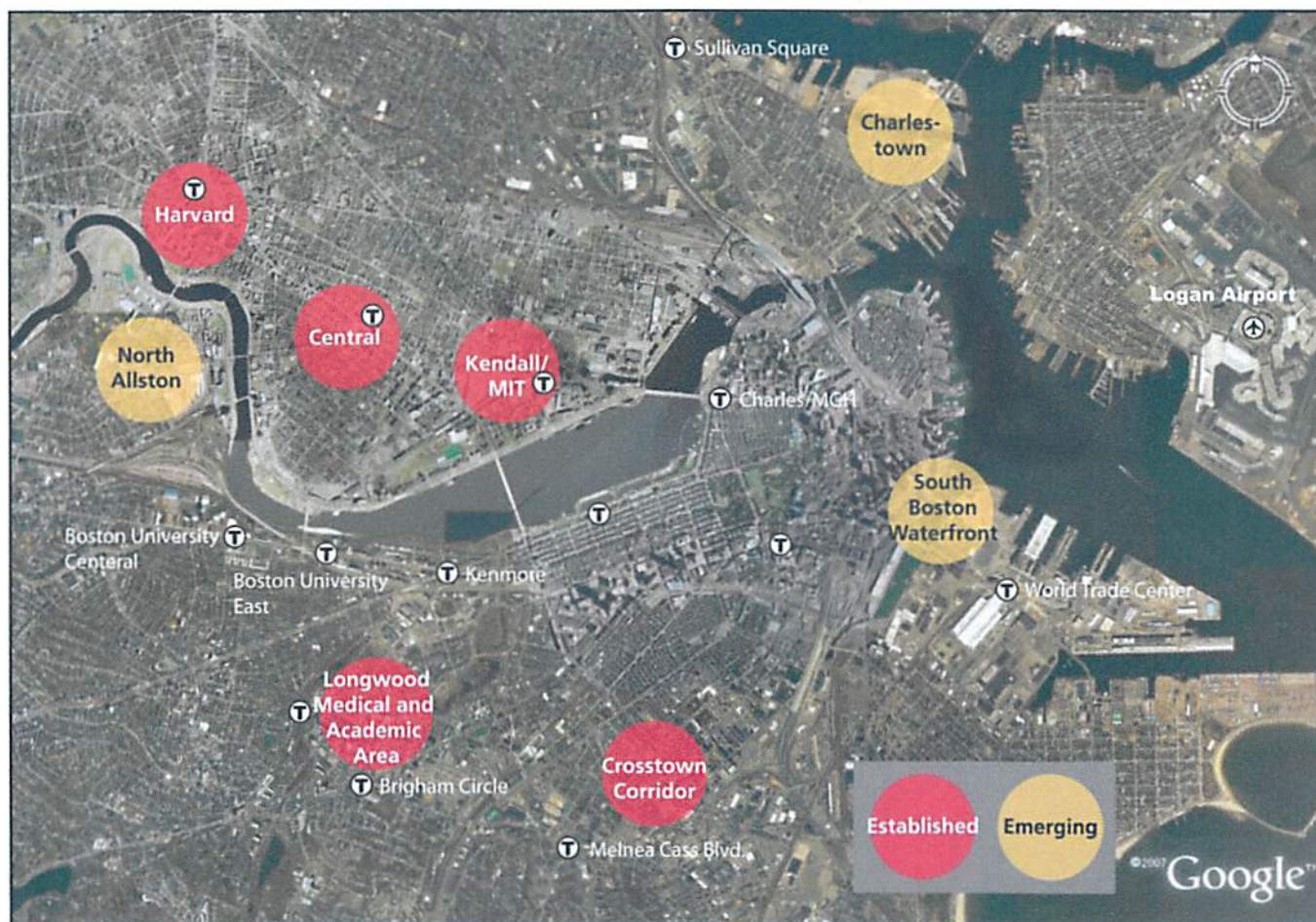
Access and mobility  
a challenge across  
the state

Need to address in  
order to grow  
economy

Issue for clusters in  
Boston/Cambridge  
as well



# Transportation Strategies for Economic Cluster Growth and Development



Enhance access and mobility:

- Within clusters
- To and from clusters

Boston/Cambridge:

- Compact geography
- High “bump rate”
- “Meds and eds”
- Logan Airport
- Challenge: Traffic
- Solution: Transit



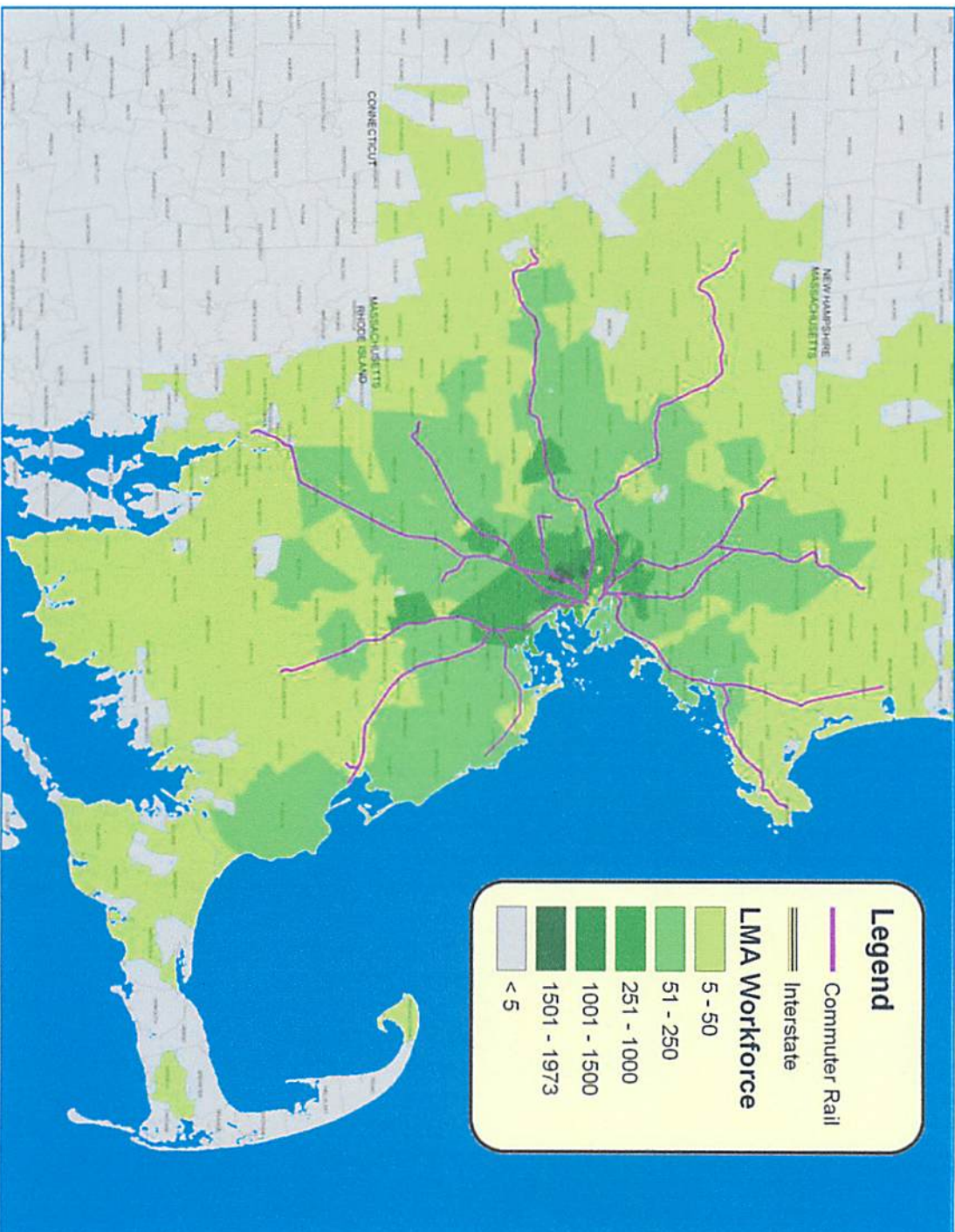


## Transportation Needs of Key Mass. Clusters

Industry Sectors	Commute: Road/Transit	Visitor Road/Rail	Trucks (Freight)	Air-Grnd Trans	Sea-Grnd Trans
Financial & Info Tech	X				
Life Sciences	X	X			
Medical Devices	X		X	X	
Tourism & Creative Econ		X		X	
Defense & Energy Prod.	X		X		
Marine Sciences	X				X

Source: *Moving Forward: Transportation Investment and the Massachusetts Economy*, Our Transportation Future, 2010.

# Life Sciences Job Shed: Well Beyond Boston & Cambridge



Source: MASCO, 2008





# Life Sciences Investment Strategies

## Life Sciences Investment Strategy: Competitors

Source of Funding	R&D Facilities	Research Grants	Transportation Infrastructure
Federal Government	✓	✓	✓
Private Institutions & Companies	✓	✓	✓
State Government	⊙	⊙	⊙

Key: ✓=existing source. ⊙=target for new investment

Boston Cambridge has a competitive advantage in R&D, Research Grants

Frees us to target state and federal transportation investment, leverage private sector involvement

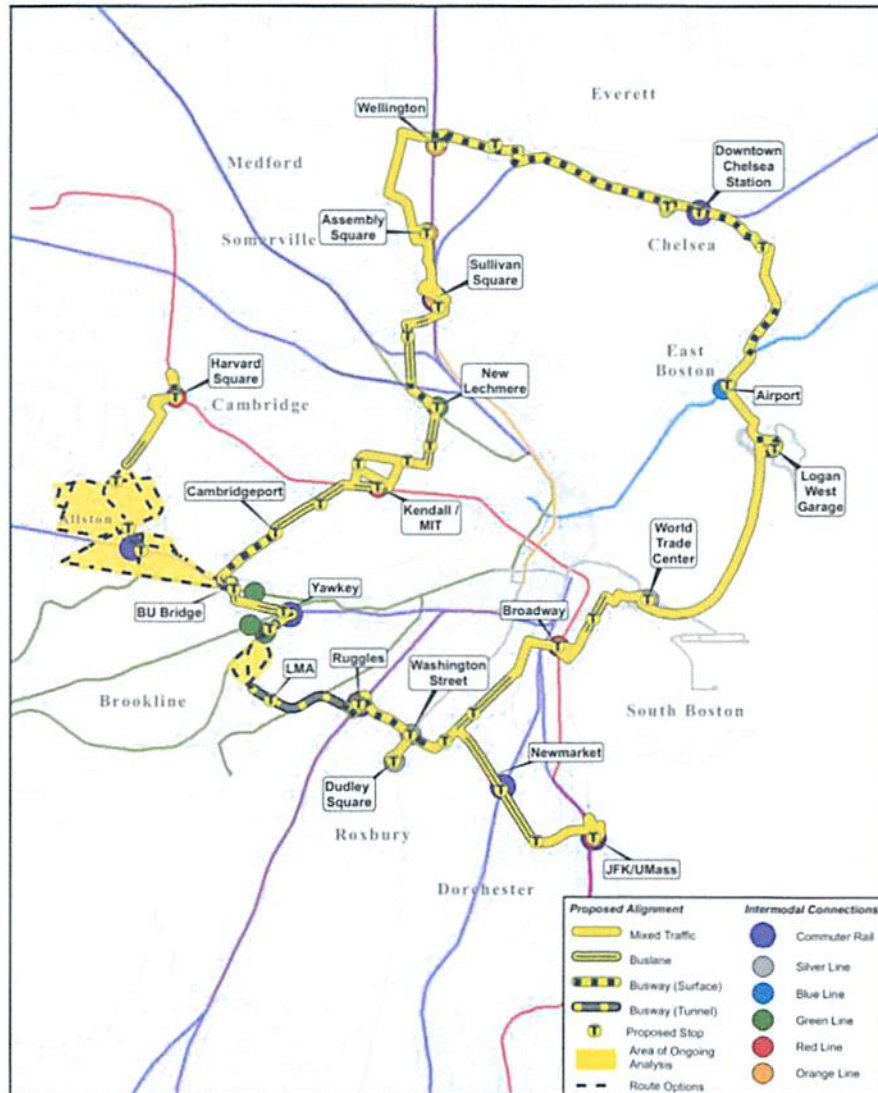
## Life Sciences Investment Strategy: Metropolitan Boston

Source of Funding	R&D Facilities	Research Grants	Transportation Infrastructure
Federal Government	✓	✓✓✓	⊙
Private Institutions & Companies	✓✓✓	✓	✓
State Government			⊙

Key: ✓=existing source, ⊙=target for new investment

Transportation investments to support one cluster benefit other potential clusters as well.

# Key Transportation Projects Today

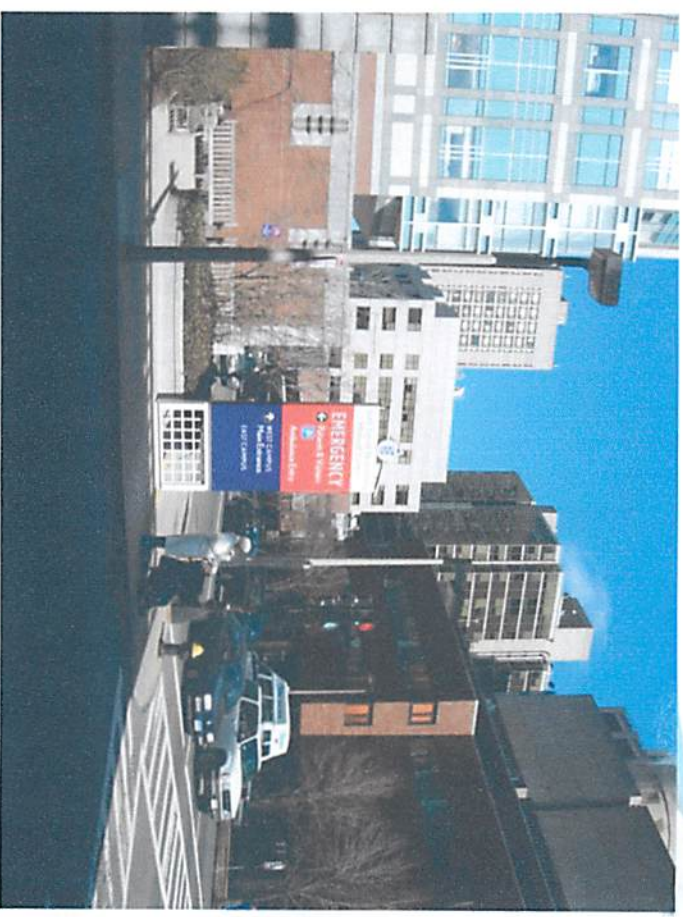




Kendall Square ←→ Longwood Medical Area



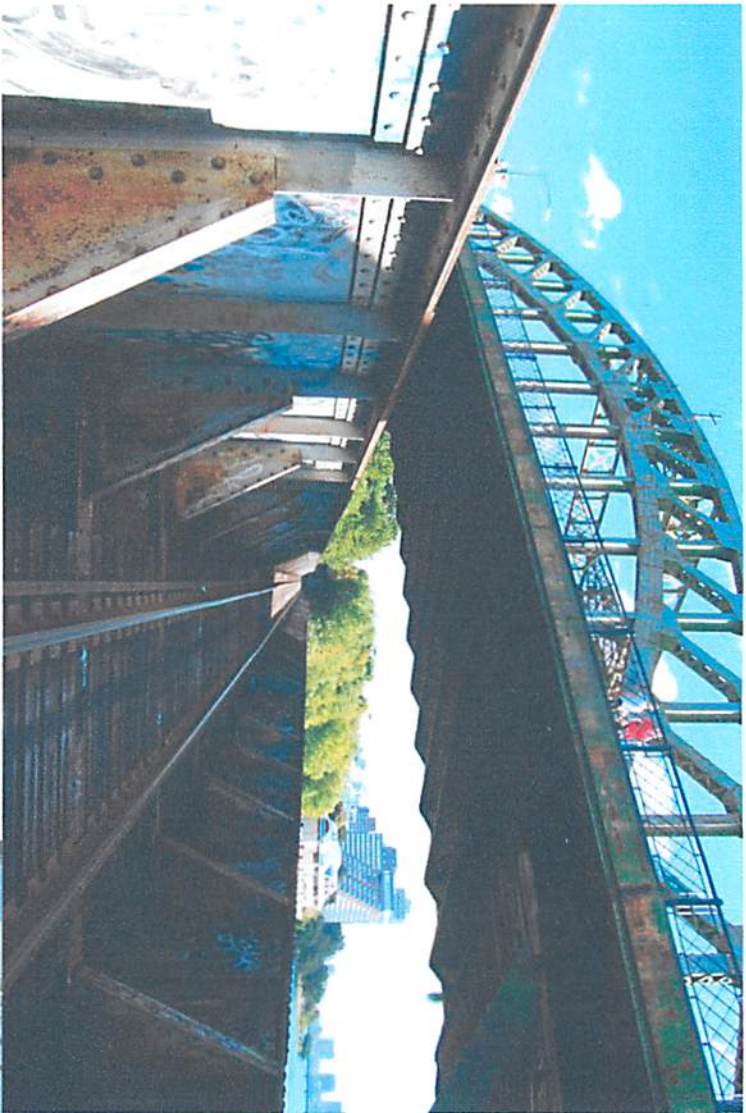
Kendall Square



Longwood Medical Area



## CSX Acquisition: Grand Junction Line







## CSX Acquisition: Allston Rail Yard



CSX Moving Freight  
Operations to Worcester

Allston “West Station” with  
Multimodal Connections:

- Turnpike
- Framingham/Worcester  
Commuter Rail Line
- MBTA Bus/Trolley/Urban Ring
- “Fast-track” service
- Private Shuttles
- Parking

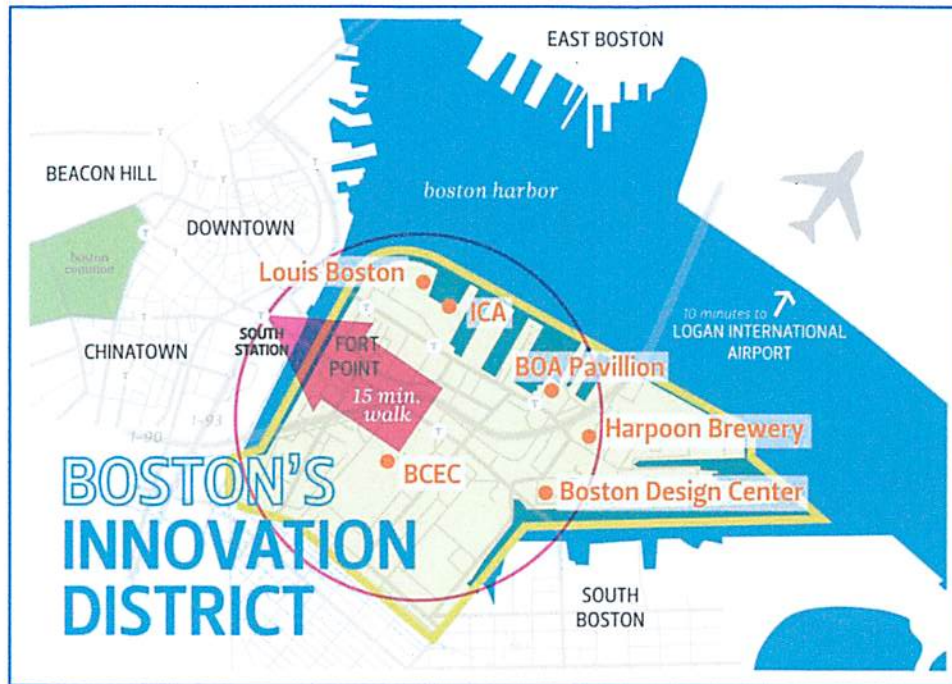
Proximity to Future Harvard  
Allston Campus and to B.U.

## Connections to UMass Boston





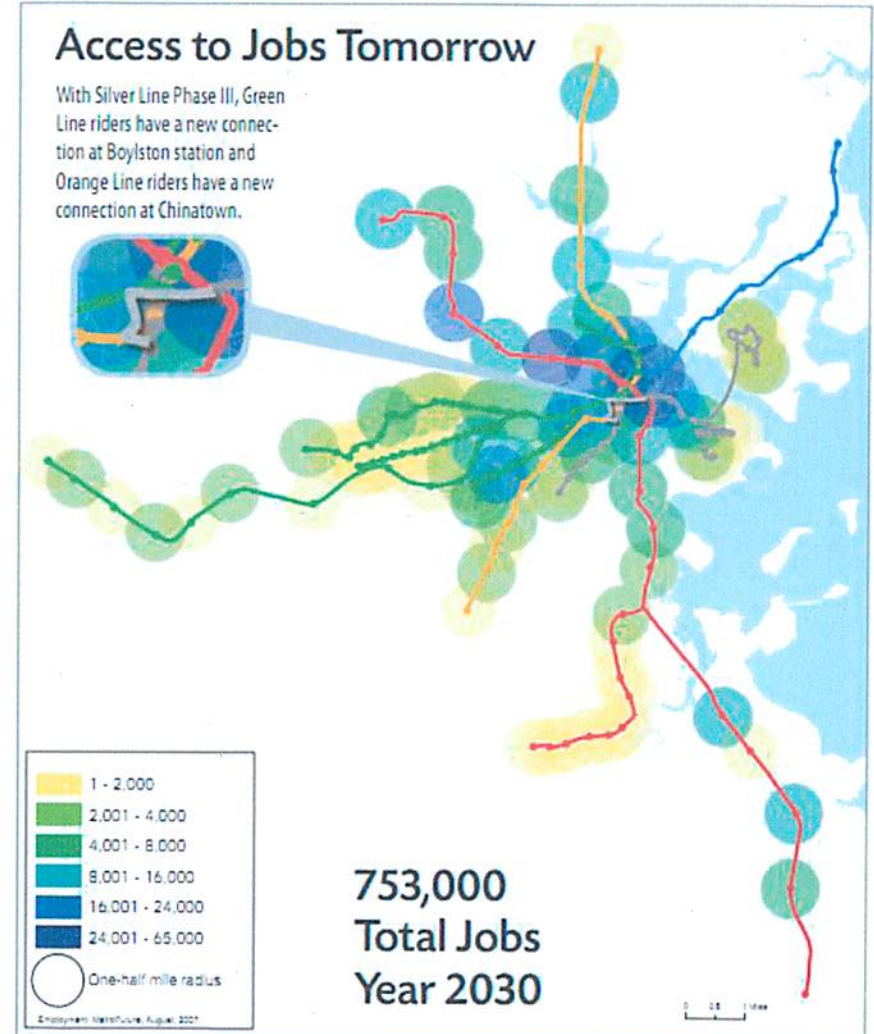
# South Boston Waterfront Innovation District



Graphic: City of Boston

New developments (today's *Boston Globe*):

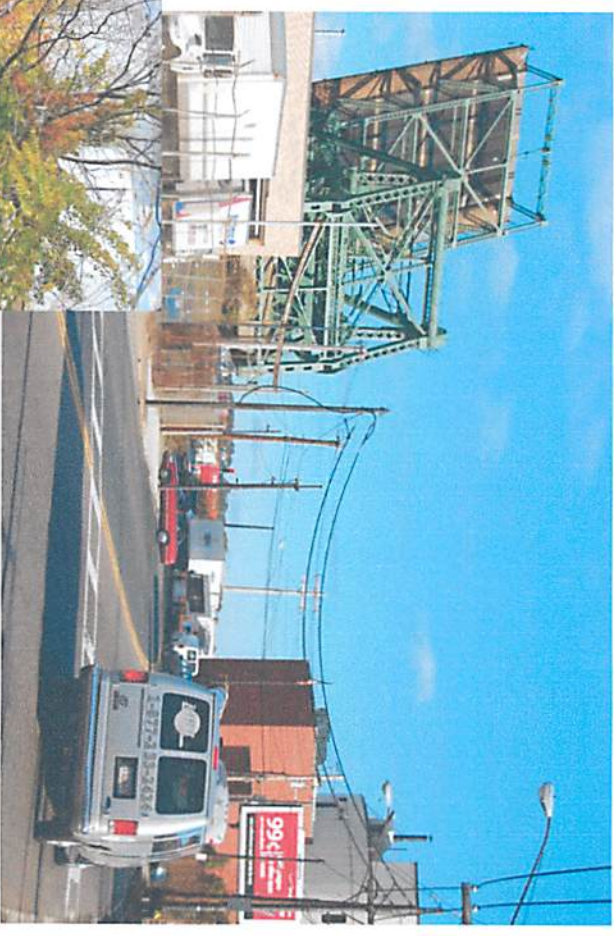
- 319A Summer: residential apartments
- Oasys: clean water technology



A completed Silver Line Phase III allows for roughly 753,000 jobs within a 1/2 mile of MBTA stations with a one transfer or less ride to the Airport, South Boston Waterfront, and/or Dudley Square by 2030.

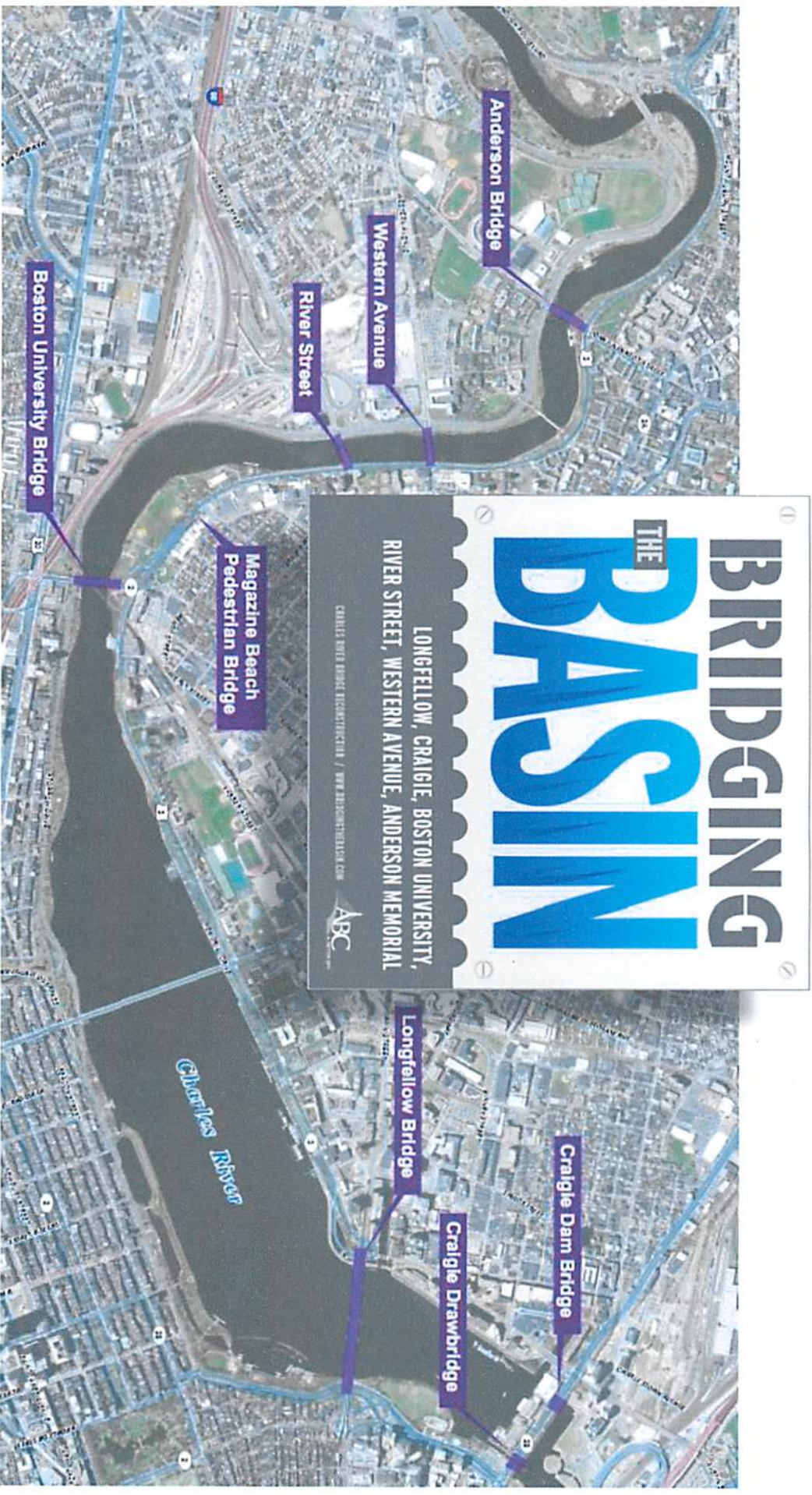


## East Boston Bypass Road (MassPort/MassDOT)



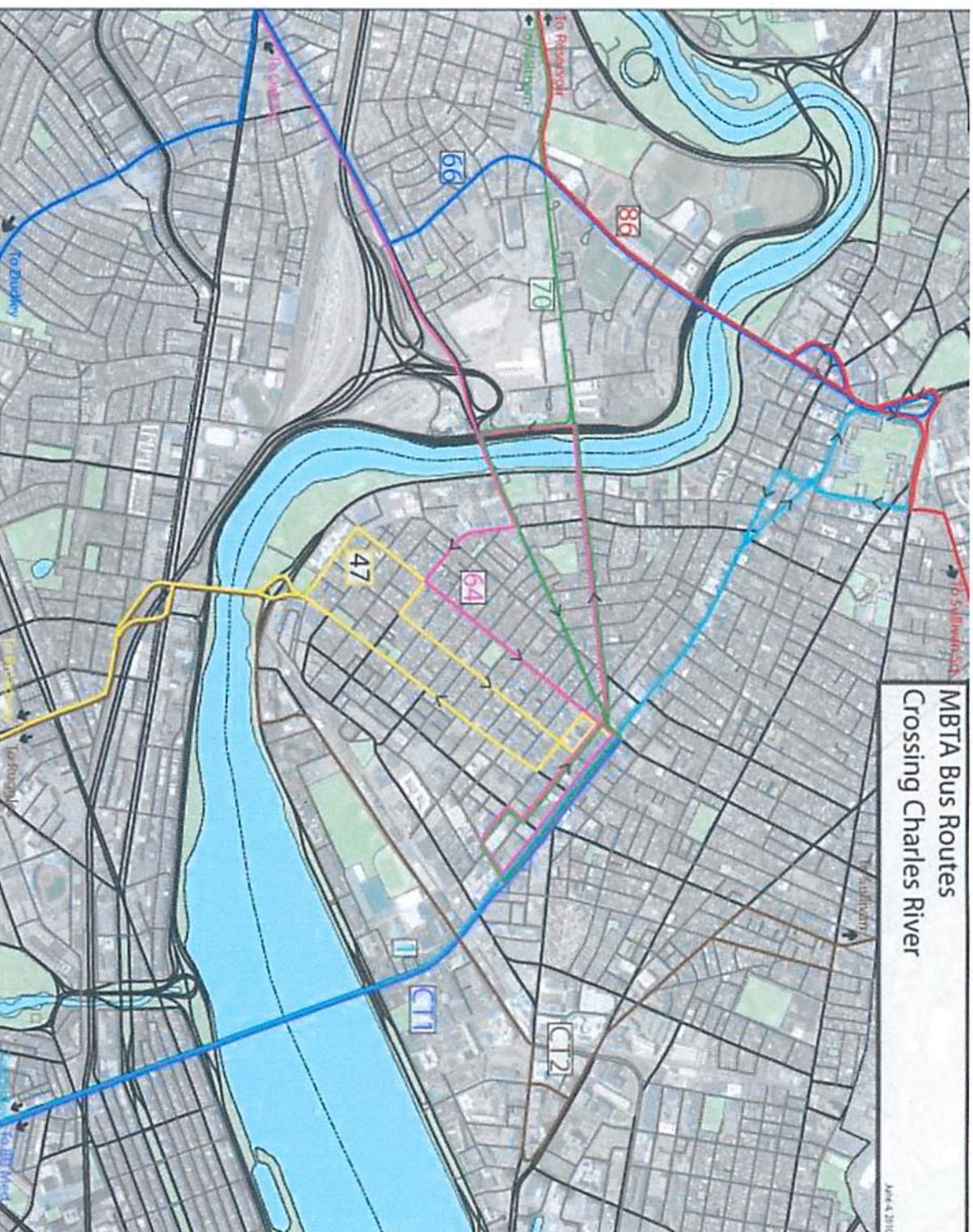


## Charles River Bridge Reconstruction



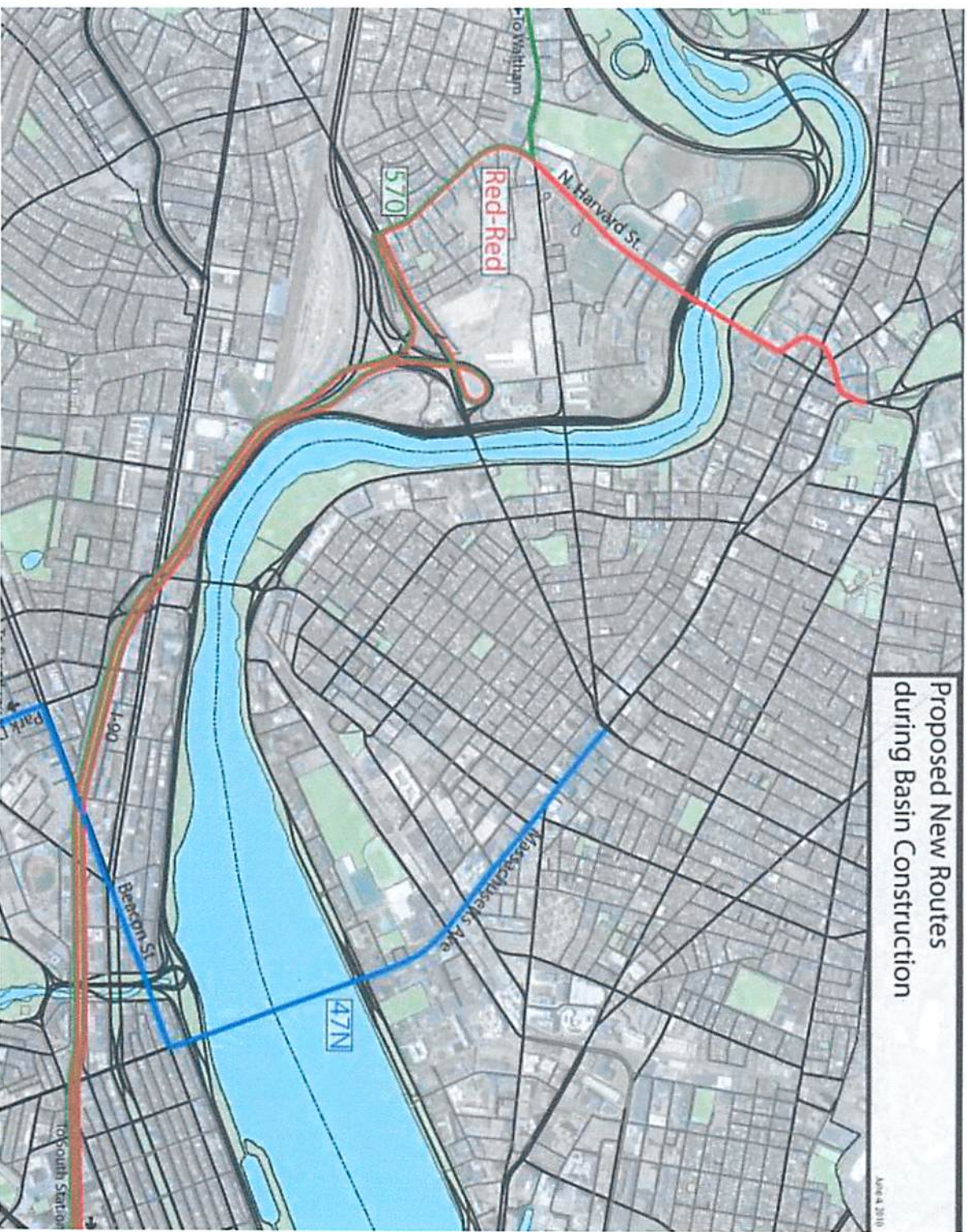


## Bridging the Basin: Transit Mitigation





## Bridging the Basin: New Bus Routes





# Transportation Finance and Policy

## Cumulative MBTA Budget Deficits, FY 2011-2014



Graphic: MBTA Review (2009)