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Bumpy Skies

After 9/11, JFK and LaGuardia Continue to Lose Market Share to Other Major U.S. Airports

The land under the city's two airports was the focus of considerable attention this summer, when Mayor Bloomberg proposed swapping it for city control of the World Trade Center site. But aside from considering the sites as a bargaining chip, neither city nor state economic development officials have adequately focused on the airports themselves—particularly, whether JFK and LaGuardia will be able to quickly recover from the huge declines in passenger travel and cargo business they experienced after September 11 and whether, in the coming years,they can continue to be among the city's most important sources of jobs and revenue.

JFK and LaGuardia have long been among the city's most dependable economic assets, with nearly 50,000 on-airport jobs and thousands more related jobs throughout Queens. In the future, the airports could be even more important to the city's economy: the Federal Aviation Administration (FAA) projects significant growth in airline travel and air cargo movements over the next decade. The problem is, there's no guarantee that New York's airports will capture a significant portion of this expected growth—or even if the two airports will regain the business they've lost since September 11.

Since last year's terrorist attack, the city's two airports have experienced greater losses in passenger traffic and cargo movements than virtually any other major airport in the nation. Nearly 10,000 airport-related jobs in the city have been eliminated over the past year—a greater percentage of job losses than any other industry in the city. And the top airline at each city airport is facing severe problems: US Airways,the airline with the most flights out of LaGuardia, recently declared bankruptcy, and American Airlines, which has the largest presence at JFK, announced significant cutbacks in staff and flights.

The post-9/11 trends are primarily the result of external factors, such as the global economic slowdown, a steep drop in business travel and security concerns. But the problems at JFK and LaGuardia have deeper causes that predate the terrorist attacks: the two Queens airports have been gradually losing their edge to other major airports across the country for much of the past decade. While some contributing factors are out of the hands of local policymakers, there is much that city and state officials can do to help stabilize and improve this important sector.

Despite the great importance of the aviation sector to the city's economy, there is virtually no research being done analyzing short-term and long-term trends—in passenger airline and air cargo business at New York's airports.The Center for an Urban Future has tried to fill this void.This report details how passenger travel and air cargo business at JFK and LaGuardia have fared since September 11, compared to other major American airports, and documents how many jobs in this sector have been lost as a result of the terrorist attacks. Following-up from the Center's 2000 report "On a Wing and a Prayer: Highway Gridlock, Antiquated Cargo Facilities Keep New York's Airports Grounded," this report also provides updated data comparing growth rates at JFK and LaGuardia with other major airports over the past 10 years.The results show some cause for concern:

- Over the past year, the air transportation sector has lost 16.5 percent of its jobs—by far the most of any city industry (a decline from 54,700 jobs in August 2001 to 45,700 in August 2002).The industry with the next highest percentage of job losses was the securities industry, with a loss of 9.6 percent.

- Jobs in the city's trucking and warehousing sector, many of which are located at the airports, are down by more than 1,000 in the same 12-month period, from 21,800 in August 2001 to 20,500 in August 2002.

- Hotels at and around JFK Airport have fared significantly worse over the past year than hotels in other parts of the city. Between July 2001 and July 2002, the occupancy rate for major hotels at JFK Airport declined by 7.5 percent (from a 72 percent occupancy rate to a 66.6 percent) compared to a 1.8 percent drop at hotels citywide. The revenue per available hotel room (known as "RevPar") was down by 15 percent at JFK and 11 percent citywide.

- According to the Queens County Economic Development Corporation,28 percent of all unemployment claims filed in New York City that were directly related to September 11 have come from Queens residents, many of them from people that had been working in airport-related jobs.

- In the 10 months since September 2001 (October 2001 through July 2002), JFK and LaGuardia have sustained bigger losses than almost every other major hub airport in the U.S. According to the FAA,commercial operations are down by 17.7 percent at JFK and by 15.5 percent at LaGuardia during this time. Only three of the nation's 31 largest hubs have fared worse than JFK and only 6 of the 31 have fared worse than LaGuardia. The average hub was down by 8.8 percent during this period. Newark was down by 12.8 percent.

- In the first six months of 2002, cargo traffic into the New York City customs district, which includes JFK, LaGuardia and Newark airports, was down 7.8 percent compared to the first half of 2001 and 20.5 percent compared to the first six months of 2000. While the New York area still handles far more air cargo traffic than any other customs district in the U.S., the next three largest customs districts fared significantly better over the same period. In Miami, air cargo traffic was down 3.7 percent compared to 2001 and 8.2 percent compared to 2000; LA was up 0.22 percent compared to 2001 and down 6.3 percent compared to 2000; Chicago was up 0.24 percent compared to 2001 and down 6.6 percent compared to 2000.

- JFK and LaGuardia were already on the way down before September 11. For instance:

    - Passenger traffic at JFK was down 11 percent between 2000 and 2001—from 32,856,220 in 2000 to 29,349,000 in 2001.

    - Passenger traffic at LaGuardia was down 14 percent over the same period—from 25,374,866 in 2000 to 21,933,000 in 2001.

    - Cargo traffic at JFK,the city's only major cargo airport, declined by 21 percent between 2000 and 2001—from 1,817,727 in 2000 to 1,430,727 in 2001.

- New York's airports have grown at a much slower rate than others over the past 10 years:

- JFK was the nation's seventh busiest passenger airport in 1991. In 2001, it was the 14th busiest passenger airport.

- LaGuardia was the nation's 15th busiest passenger airport in 1991. In 2001, it was the 22nd busiest airport.

- Newark was the 9th busiest airport in 1991 and the 13th busiest airport in 2001.

- JFK was the nation's busiest cargo airport in 1991. In 2001,it was the 6th busiest.

- Between 1991 and 2001, passenger airline traffic increased by just 7 percent at JFK and 7 percent at LaGuardia. In contrast, passenger airline traffic increased by 33 percent at Newark, 14 percent at Chicago O'Hare Airport, 35 percent at Los Angeles International Airport, 100 percent at Atlanta Hartsfield International Airport,19 percent at Miami International Airport and 12 percent at Boston International Airport.

- Between 1991 and 2001, cargo tonnage at JFK increased by 14 percent,compared to 65 percent at Newark, 70 percent at Miami International Airport and 55 percent at Los Angeles International Airport.

Without a doubt, the September 11 attacks dealt a severe blow to the entire nation's aviation industry. Airline travel and air cargo business is down significantly in virtually every region of the country. But the figures above show that JFK and LaGuardia have seen greater losses than most. Further, they demonstrate that 9/11 may have only intensified and accelerated a long-term trend in which the city's two airports have been losing market share to other major hubs.

These developments shouldn't be taken lightly. JFK and LaGuardia have long served as two of the city's most critical sources of jobs and revenues. And the airports help provide diversity to the city's Wall Street-dominated economy—a balance that has become increasingly important in the aftermath of 9/11.

While there are now slightly under 50,000 jobs in the city's "air transportation"sector, there are many additional jobs at and around JFK and LaGuardia in occupations tied to the airports—including warehouse workers, truck drivers,freight forwarders,parking attendants,limo drivers, and government workers. (The FAA alone has 500 employees at its regional office on Rockaway Boulevard,just across the street from JFK.) A 1995 economic analysis of the New York's aviation industry by the Port Authority found that JFK had 76,600 on-airport jobs and 59,660 off-airport jobs while LaGuardia had 17,330 on-airport jobs and another 13,610 off-airport.

"The job losses are much bigger than we initially thought they would be," says Marie Nahikian, executive director of the Queens County Economic Development

continued on page 6

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The Center for an Urban Future is a policy institute dedicated to aggressively pursuing solutions to the most critical problems facing cities.

This report was written by Jonathan Bowles. It was edited by David Jason Fischer and designed by Julia Reich.

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Percentage of Jobs Lost by Industries, NYC
(August 2001 to August 2002)

The air transportation sector lost a larger percentage of jobs than any other industry in New York City between August 2001 and August 2002. The following figures compare the percentage of jobs lost in an assortment of important industries in New York City between August 2001 and August 2002.

Sector	Jobs in 8/01	Jobs in 8/02	Change in Jobs	% Change
Air Transportation	54,700	45,700	- 9,000	- 16.5 %
Securities & Commodities Brokers	190,600	172,300	- 18,300	- 9.6 %
Depository Institutions	98,900	89,800	-9,100	- 9.2 %
FIRE (Finance, Insurance & Real Estate)	495,200	463,900	-31,300	- 6.3 %
Trucking & Warehousing	21,800	20,500	-1,300	- 6.0 %
Hotel & Other Lodging	38,400	36,100	-2,300	- 6.0 %
Business Services	323,400	304,000	- 19,400	- 6.0 %
Manufacturing	230,600	217,200	- 13,400	- 5.8 %
Apparel & Other Textile Manufacturing	52,300	49,500	- 2,800	- 5.4 %
Construction	128,600	125,000	- 3,600	- 2.8 %
Wholesale Trade	182,600	179,600	- 3,000	- 1.6 %
Retail Trade	430,600	425,100	-5,500	- 1.3 %

Source: New York State Department of Labor

Percentage Change in Commercial Operations at 31 Largest Hub Airports in U.S. (October 2001 to July 2002)

JFK experienced a larger drop in commercial operations in the 10 months after September 11 (October 2001 to July 2002) than all but three of the 31 large hub airports in the U.S. Meanwhile, LaGuardia fared better than only six of the 31 large hubs.

Sector	Gain/Loss in Commercial Operations— September '01 to July '02
Cincinnati	+ 24.2 %
Salt Lake City	+ 10.2 %
Minneapolis/St. Paul	+ 7.1 %
Charlotte	- 1.7 %
Atlanta	- 3.9 %
Fort Lauderdale	- 4.0 %
Pittsburgh	- 4.3 %
Chicago O'Hare	- 5.3 %
Phoenix	- 5.4 %
Las Vegas	- 5.6 %
Detroit	- 6.3 %
Honolulu	- 6.4 %
Philadelphia	- 7.0 %
Houston	- 7.7 %
Baltimore/Washington	- 7.8 %
St. Louis	- 8.0 %
Denver	- 8.5 %
Average Change for 31 Large Hub Airports	- 8.8 %
San Diego	- 9.1 %
Dallas/Ft. Worth	- 10.2 %
Miami	- 11.2 %
Newark	- 11.2 %
Washington Dulles	- 13.4 %
Orlando	- 14.6 %
LaGuardia	- 15.5 %
San Francisco	- 15.9 %
Seattle	- 16.6 %
JFK	- 17.7 %
Boston	- 20.4 %
Los Angeles (LAX)	- 20.9 %
Washington National	- 40.6 %

Source: Federal Aviation Administration

continued from page 3

Corporation. "And what happens at the airports has a huge impact on the Queens economy."

Nahikian notes that the steep drop in business at the airports has had repercussions throughout Queens. Food catering firms, parking lot operators, car service companies and many other companies in the borough have been negatively impacted by the slowdown in business at JFK and LaGuardia. For example, Sky Chefs, an airplane catering firm based in the Rockaways, which has the highest unemployment levels in the borough, has laid off half of its workforce since 9/11. "It's crucial that we nurture this industry," she says.

Despite all of this, Nahikian says that none of the federal or state programs that seek to provide benefits to businesses and workers impacted by September 11 have addressed any of the problems at the airports.

It's easy to take the airports contribution to the city's economy for granted. After all, any city with 8 million residents, hundreds of international corporations and a thriving tourism trade should provide a steady stream of airline passengers—and a large market for air cargo shipments—well into the future.

But in today's global economy, the city's airports—JFK in particular—have more competition than ever before. A generation ago, JFK was one of the only hubs for international airline travel on the East Coast. Passengers from other parts of the country heading to Europe and other foreign destinations often had to go through Kennedy, which had a stranglehold on international flights originating from the East Coast. By the same token, most of the overseas freight that was destined for, or being shipped from, locations along the Eastern U.S. also had to go through JFK—primarily because most cargo is shipped in the bellies of passenger aircraft. Today, passengers and freight clients have more options than ever before. Thanks to technological advances that allow smaller aircraft to fly longer distances, airports in Boston, Philadelphia, Pittsburgh, Washington, Baltimore, Charlotte, Atlanta and even Cincinnati now offer daily flights to international destinations. And on the cargo side, freight can just as easily be flown into Miami, Chicago, Atlanta and Newark and taken by truck to destinations up and down the East Coast.

In addition, some of the stiffest competition for JFK and LaGuardia has come from nearby Newark International Airport, which has grown over the past 15 years from a minor airport to a hub that now handles more passengers than either of the Queens airports. Its proximity to a national highway network and the region's largest port has also helped it steal significant cargo business from Kennedy.

To a significant extent, the declining fortunes of JFK and LaGuardia have been beyond the control of airport managers and local economic development officials. LaGuardia, located on a relatively small piece of land and with virtually no room to expand, has simply hit a ceiling on the number of flights and passengers it can handle—while other airports have had room to grow. JFK, which is substantially larger than LaGuardia and still has some room for expansion, has been hurt by changes in the airline industry that have made it possible for travelers to fly overseas (and allow businesses to ship cargo overseas) without going through New York.

Beyond these structural factors, however, inaction and inattention by local government officials has significantly contributed to the airports' problems in several key areas. While the Port Authority of New York and New Jersey, the bi-state agency that manages the airports, has contributed to key improvements within the airports themselves, the Giuliani and Pataki administrations long neglected related issues of arguably even greater importance to re-establishing JFK and LaGuardia as vibrant engines of economic growth.

The Port Authority, which is essentially responsible for improvements inside the boundaries of the airports, has overseen an expansion of LaGuardia's main terminal and an infrastructure modernization program at JFK in which airlines have committed more than $6.5 billion to redevelop passenger terminals and build new freight warehouses. It has also used nearly $4 billion in federal grants and its own funds to improve the on-airport road system, build new parking garages and develop AirTrain, a much-needed rail system that will connect passenger terminals at JFK with the Long Island Rail Road station in Jamaica.

The city's Economic Development Corporation (EDC), through the use of industrial development bonds, has helped finance private sector investments in new terminals and cargo facilities at Kennedy. It also made available a 28-acre site owned by the city just outside the borders of JFK for a four-building, 170,000 square foot air cargo warehouse complex—a project that is now under-

Access: The Biggest Problem Facing New York's Airports

For years, city and state officials have neglected to address the mounting delays on the highways in Queens and Brooklyn that lead to the airports. In particular, the chronic congestion on the Van Wyck Expressway and the Belt Parkway—the only major highways leading to Kennedy Airport—is one reason behind the astounding growth in passenger traffic at Newark and is a significant threat to the future viability of JFK's way.

Unfortunately, however, the public sector in New York has neglected to adequately address other crucial issues facing the aviation sector, including the single most critical obstacle to the industry's long-term sustainability in Queens: access to the airports. In fact, despite their economic importance, the two Queens airports and the city's aviation industry has long been only a minor part of the city's economic development strategy.

Midtown Manhattan is 15 miles from JFK Airport and 16 miles from Newark Airport, but Newark is almost universally perceived as the easier of the two airports to access.

The unpredictability of the commute to JFK—getting there by taxi or car can take as little as 30 minutes or as much as two hours, depending on traffic—has prompted many New Yorkers to opt to fly out of Newark Airport on long-distance instead of Kennedy. Perhaps surprisingly, JFK is actually closer to Midtown Manhattan than Newark Airport—it is 15 miles to JFK and 16 to Newark. But, Newark Airport is almost universally perceived as the easier of the two to access.

In addition to the regular highway delays, JFK is one of the only big city airports in the world that doesn't have a one-seat rail link offering a fast, convenient connection between the airport and the city. The Port Authority is now in the midst of constructing AirTrain, a rail link that will connect passengers from JFK to Jamaica, where they will be able to transfer to a subway or a Long Island Rail Road train headed for Penn Station. The Port Authority deserves much credit for taking the lead on this needed infrastructure project, but many top airline officials believe that few passengers will use AirTrain until it becomes a one-seat ride. They fear that passengers carrying heavy baggage will be deterred by having to transfer trains at Jamaica.

"We really need a one-seat ride," says Mauri Leppala, current president of the JFK Chamber of Commerce and Finnair's area manager for the America's. "Many things are coming along at Kennedy. They've just built a new terminal four, a new terminal one and American is developing a new terminal. We just need better access to make sure passengers come here and use these new facilities."

Leppala also notes that of the three airports in the New York City area, JFK has the most potential for growth. Newark and LaGuardia are slot-controlled airports, with FAA-imposed limits on the number of takeoffs and landings. Plus, JFK has more available land for expansion.The problem,Leppala says,is getting people to the airport.

Even more problematic, these access problems threaten the very future of New York's air cargo industry. The problem is particularly acute for the cargo industry because the Belt Parkway is closed to commercial traffic, leaving trucks with just one major route to get from the airport to other parts of the city as well as highways outside the city: the chronically overcrowded Van Wyck Expressway. Though JFK has long been one of the world's top cargo airports—and an important source of blue collar jobs in Queens—industry officials are becoming increasingly frustrated with the time delays in transporting cargo to, or from, the airport.These delays eat into companies' profits, causing more and more cargo operators to consider the idea of moving cargo through other major airports that have easier access. As the Center's 2000 report documented, some have already begun to do it.

Largely due to access issues, the majority of the overnight delivery business in the metro area shifted from JFK to Newark over the past 10 to 15 years. Today, the overwhelming majority of overnight cargo companies in the area are based out of Newark. During the year ending in June 2002, FedEx and UPS together transported 650,000 tons of cargo through Newark, but less than 200,000 tons through JFK. These and other overnight delivery companies, which depend on quickly getting packages off planes and to their customers, simply found it more convenient to get deliveries to Midtown and Downtown Manhattan from Newark than from Kennedy.

"We have some of the best cargo facilities in the world [at JFK], but we're strangled on the ground once the cargo is flown into the airport. The cost of moving it into the distribution network becomes horrendous, mostly because of the time to move the cargo from Kennedy."

Industry officials based at JFK fear some of the airport's international cargo haulers could make a similar move, if not to Newark,then to other international hubs. They point to Nippon Cargo Airlines, which, in 2000,

Trends in Air Cargo Traffic in Top U.S. Customs Districts January – June 2000 through 2002 (Figures in tons)

Customs District	2002	2001	2000	% Change from 01-02	% Change from 00-02
NYC	568.58	616.94	714.95	-7.8%	-20.5 %
Miami	356.54	370.27	388.44	-3.7%	-8.2 %
LA	353.42	352.66	377.25	+0.2%	-6.3 %
Chicago	347.43	346.60	372.17	+0.2%	-6.6 %

Source: The Port Authority of New York and New Jersey

Growth in Passenger Traffic:
New York Airports vs Other Major Airports (1991-2001)

	1991	2001	Change in # of Passengers	% Change
JFK	27,441,937	29,349,000	1,907,063	6.9 %
LaGuardia	20,545,0602	21,933,000	1,387,940	6.8 %
Newark	3,055,537	30,558,000	7,502,463	32.5 %
Chicago	59,257,551	67,448,064	8,190,513	13.8 %
Los Angeles	45,668,204	61,606,204	15,938,000	34.9 %
Atlanta	37,915,024	75,858,500	37,943,476	100.1 %
Miami	26,591,415	31,668,450	5,077,035	19.1 %
Boston	21,547,026	24,199,930	2,652,904	12.3 %

Source: Airports Council International—North America

Growth in Cargo Tonnage:
New York Airports vs Other Major Airports (1991-2001)

	1991	2001	Change in Cargo Carried	Change in % Cargo Carried
JFK	1,257,069	1,430,727	173,658	13.8 %
Newark	483,622	795,584	311,962	64.5 %
Los Angeles	1,141,196	1,774,402	633,206	55.5 %
Miami	967,241	1,639,760	672,519	69.5 %
Chicago	987,281	1,299,628	312,347	31.6 %
Atlanta	599,674	739,927	140,253	23.4 %

Source: Airports Council International—North America

Workforce Issues at the Airports

While access is probably the most important issue connected to the long-term sustainability of JFK, there are a number of other prickly issues related to the future of the city's airports that demand attention from city and state policymakers. In recent years, workforce issues have become increasingly important—and increasingly frustrating—to airport-based companies, which have had a difficult time retaining and attracting a quality workforce.

The workforce issues at Kennedy and LaGuardia are especially perplexing. On the one hand, the airports represent an opportunity to get thousands of city residents into jobs that sometimes pay good wages.Airline maintenance technicians and avionics technicians, for instance, are increasingly in demand by the industry and make a good living. On the other hand, an increasing proportion of the low-skilled jobs at the airports are with contract companies that barely pay above minimum wage. As a result, employee turnover at the airports is extremely high and the quality of the workforce is relatively low.

"As the airline industry has outsourced more and more of its work to third party contractors, the price paid per hour has gone down precipitously, causing problems with high employee turnover and an ill-trained workforce."

According to an executive at Hudson General, a major contractor at Kennedy, the firm loses about half of its roughly 1,500 employees to attrition during an average year. A vice president at another JFK-based contractor said, "In warehouse jobs, there's nearly a 100 percent turnover within a year."

Increasing wages and offering training programs to upgrade workers' skills would probably help reduce turnover, but contract companies are unlikely to do this on their own. It's simply too expensive given what they get paid by airlines.As a result,many company executives and airport leaders believe that what's needed is a higher minimum wage law—or a living wage law—that would apply to the city's airports. In recent years, Los Angeles and San Francisco each enacted municipal living wage laws that apply to their airports—workers must earn $9 an hour in San Francisco and $7.39 an hour in L.A.

"We should have a higher wage level here at Kennedy to ensure that we are able to attract and retain more qualified people," says Bill Puckhaber, publisher of JFK-based Airport Press and former president of the JFK Chamber of Commerce. "As the airline industry has outsourced more and more of its work to third party contractors the price paid per hour has gone down precipitously, causing problem with high employee turnover and an ill-trained workforce."

Recommendations

1. Make Impr oving Access to JFK an Immediate Priority

The mayor and the governor must make improving access to JFK a top economic development priority and implement at least some of the following transportation improvements:

- Make AirTrain a one-seat ride from JFK to Manhattan.As positive a development as the introduction of AirTrain will be, a two-seat ride will not be nearly as successful in attracting riders—and getting cars off the highways—as will a one-seat ride.

- Open the Belt Parkway to commercial cans during certain hours.Allowing commercial vans on the Belt—trucks wouldn't even be able to fit, given the low overpasses on the parkway—would take some pressure off the Van Wyck Expressway and might help JFK recapture some of the business from overnight express companies that primarily shifted to Newark Airport over the past decade. This could be done at certain off-peak hours.

- Create a fourth lane to the Van Wyck.City and State transportation officials should seriously look into the possibility of using the excess shoulder space added to the Van Wyck during construction of Airtrain to create a fourth lane on the roadway.

- Close one or two exit/entrance ramps on the Van Wyck Expressway during certain peak hours.Doing so would help put an end to the common practice, mostly used by taxis, of using the service road to get off and on the Van Wyck—a ritual that slows down traffic on the highway. It would help make the roadway more of an "expressway".

- Implement variable message signage on the Van Wyck. For a relatively small cost, the city could use high-tech signage to provide real-time traffic instructions to motorists and help speed the flow of traffic on the Van Wyck. Among other things,the high-tech signage could allow for a truck-only lane during a few peak hours of the day for cargo users.Several other cities have used high-tech signage to greatly reduce traffic congestion.

2. Make the Airports A Larger Part of the City & State Economic De velopment Strategy

City and state officials should make JFK and LaGuardia—and the aviation sector—a larger part of their long-term economic development strategy. They should engage industry leaders and attempt to understand the obstacles that are within their power to address.

3. Consider a Living Wage Law for the Airports

As a way of reducing high employee turnover at the airports, city officials should undertake a study examining the probable effects of a living wage law that would apply to the city's airports.

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City Limits Community Information Service, Inc.
120 Wall Street, 20th Floor
New York, NY 10005