



Presentations for December 11, 2025 Board of Directors Meeting



Item 8: Float Mounted Charging System Procurement Award

An aerial, semi-transparent view of a ferry deck. The deck is filled with various pieces of equipment, including what appears to be a charging station with multiple charging ports. There are also some tables and chairs on the deck. The overall color scheme is a light blue gradient.

Float Mounted Charging System Procurement Award

December 2025



San Francisco Bay Ferry

FLOAT MOUNTED CHARGING SYSTEM INTRODUCTION



TREASURE ISLAND



DOWNTOWN FERRY TERMINAL



- Charging capacity targeted to support 150 Passenger vessel
- Lower power than the Universal Charging Float
- No battery energy storage
- Components are long lead time



MISSION BAY

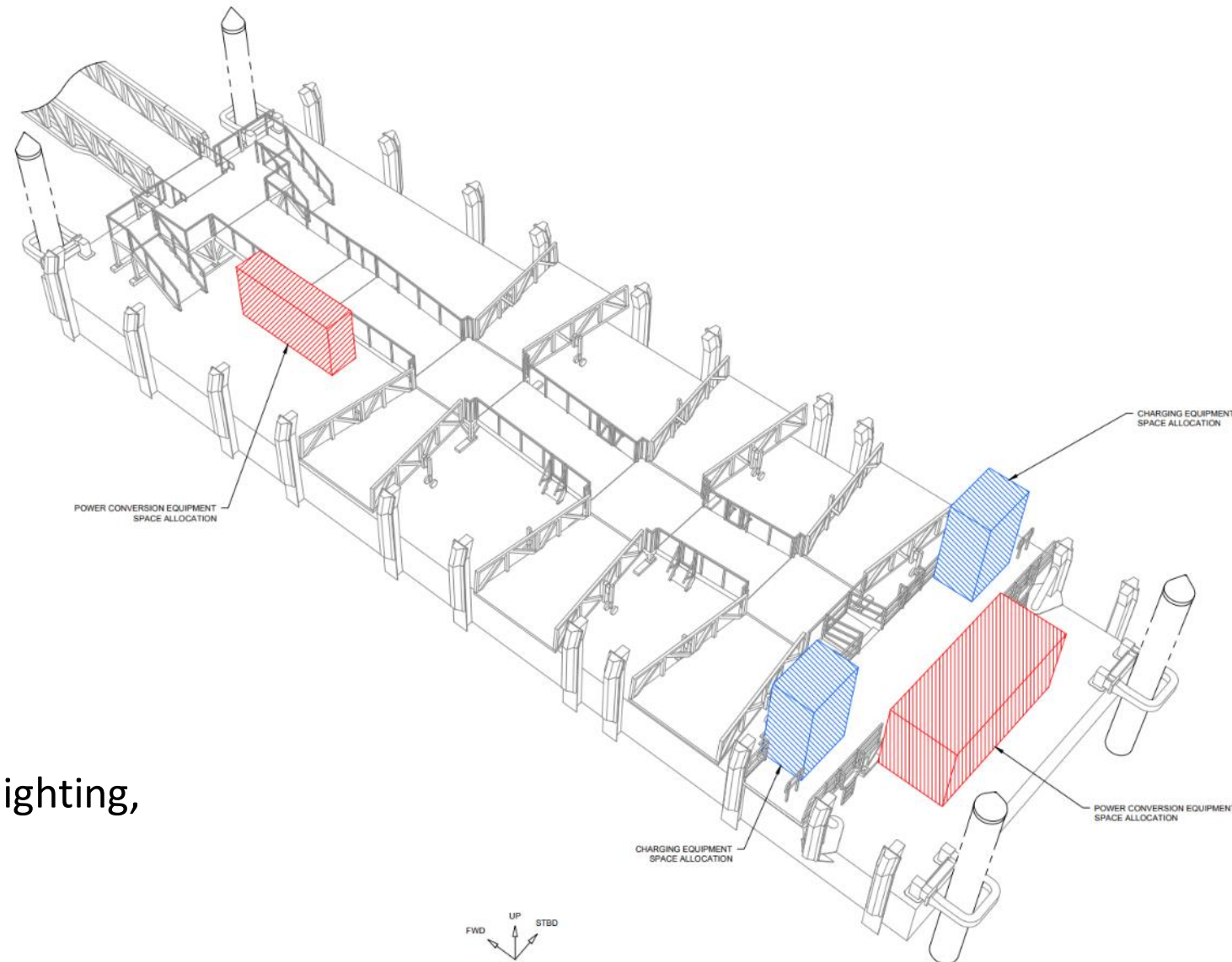
SCOPE OF CONTRACT

Charging System Requirements:

- Topside Mounted
- Size restricted to colored blocks
- Up to 1.5MW input power; output at vessel charging voltages
- Equipped with Megawatt Charging System connection standard

Excluded from this contract:

- System Installation
- Required auxiliary equipment for mooring, lighting, and power distribution



FLOAT MOUNTED CHARGING SYSTEM PROPOSALS

Proposer	Proposer's Qualifications and Experience	Technical Suitability	Total Price	Total Score	Contract Cost
Possible Points	30	30	40	100	-
ABB	27.0	22.5	7.3	56.8	\$4.36M
Cavotec	25.3	23.0	10.2	58.5	\$3.11M
Tritium Power Solutions	24.0	25.0	40.0	89.0	\$0.81M
Wärtsilä	24.5	24.0	5.8	54.3	\$5.47M



- Established Charging System Supplier
 - 21,000 installations
 - 200+ marine installations
- Scalable & large-scale production charging systems
- US production facility
- UL rated



FMCS COST ANALYSIS

Summary of Final Submitted Price Proposals for FMCS System

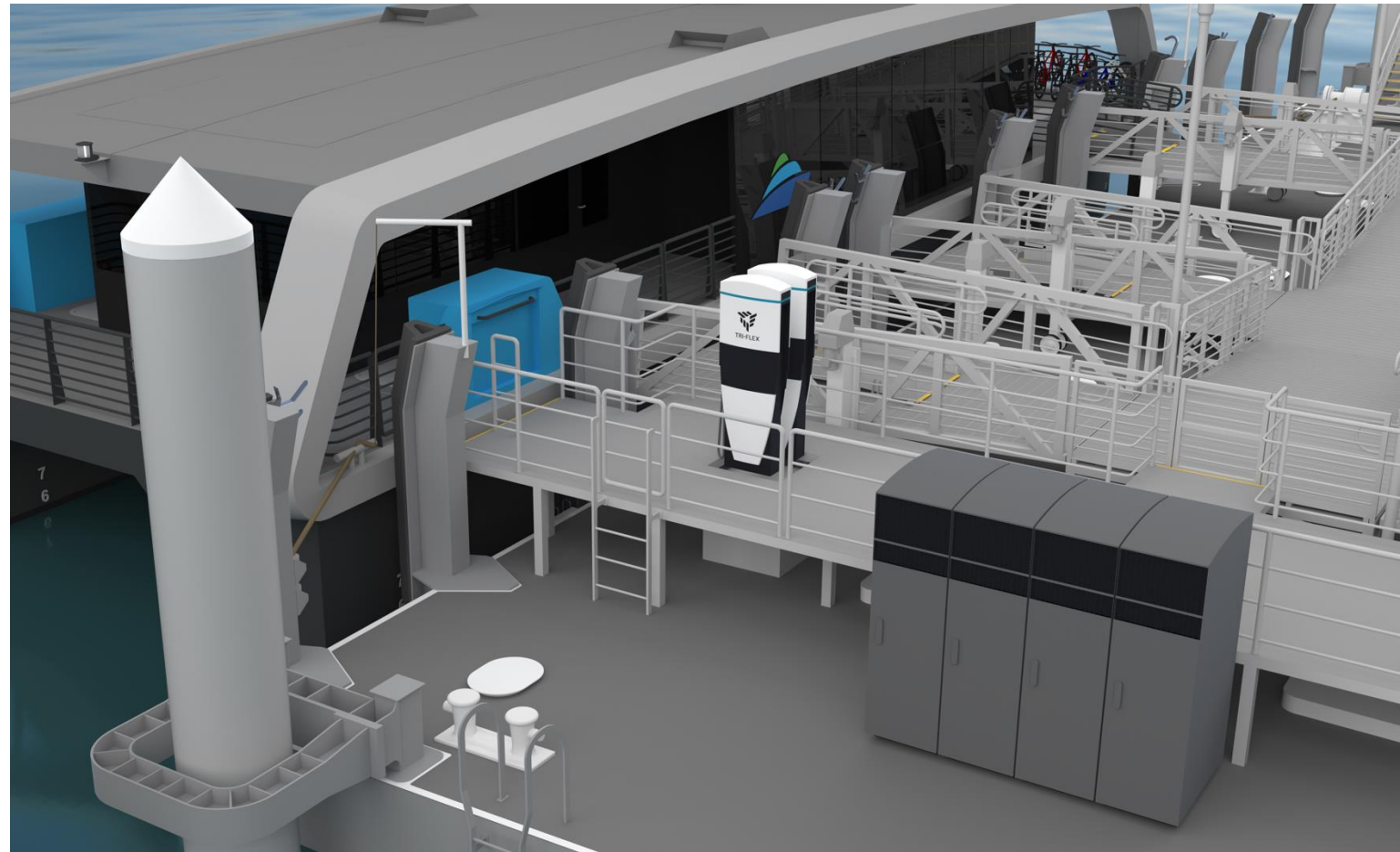
Proposer	Average Price/FMCS	% Difference from ICE
ABB	\$2.15 M	80%
Cavotec	\$1.42 M	19%
Tritium	\$0.39 M	-67%
Wärtsilä	\$2.73 M	130%
Independent Cost Estimate (ICE)	\$1.19 M	

Significant cost savings:

- ICE based on custom built solution
- Tritium pricing based on mass production system components
- Tritium's parent company, Exicom, provided componentry - eliminating markup
- Price determined fair and reasonable competitive to landside charging market

TECHNICAL SUITABILITY & EXPERIENCE EVALUATION

- Simplified installation
 - Modular platform
 - Built-in marine environment suitability
 - Operates at US voltages
 - Inherent isolation
- Established Support Model
 - Remote Monitoring
 - Local Technical Support
 - Established Training Program
 - Easy repair or replacement
- Extensive Charging System Experience





Griffin Hewitt, Director of Sales, North America



Thank you



Item 9: South San Francisco Service Study Update

South San Francisco Ferry Service Study

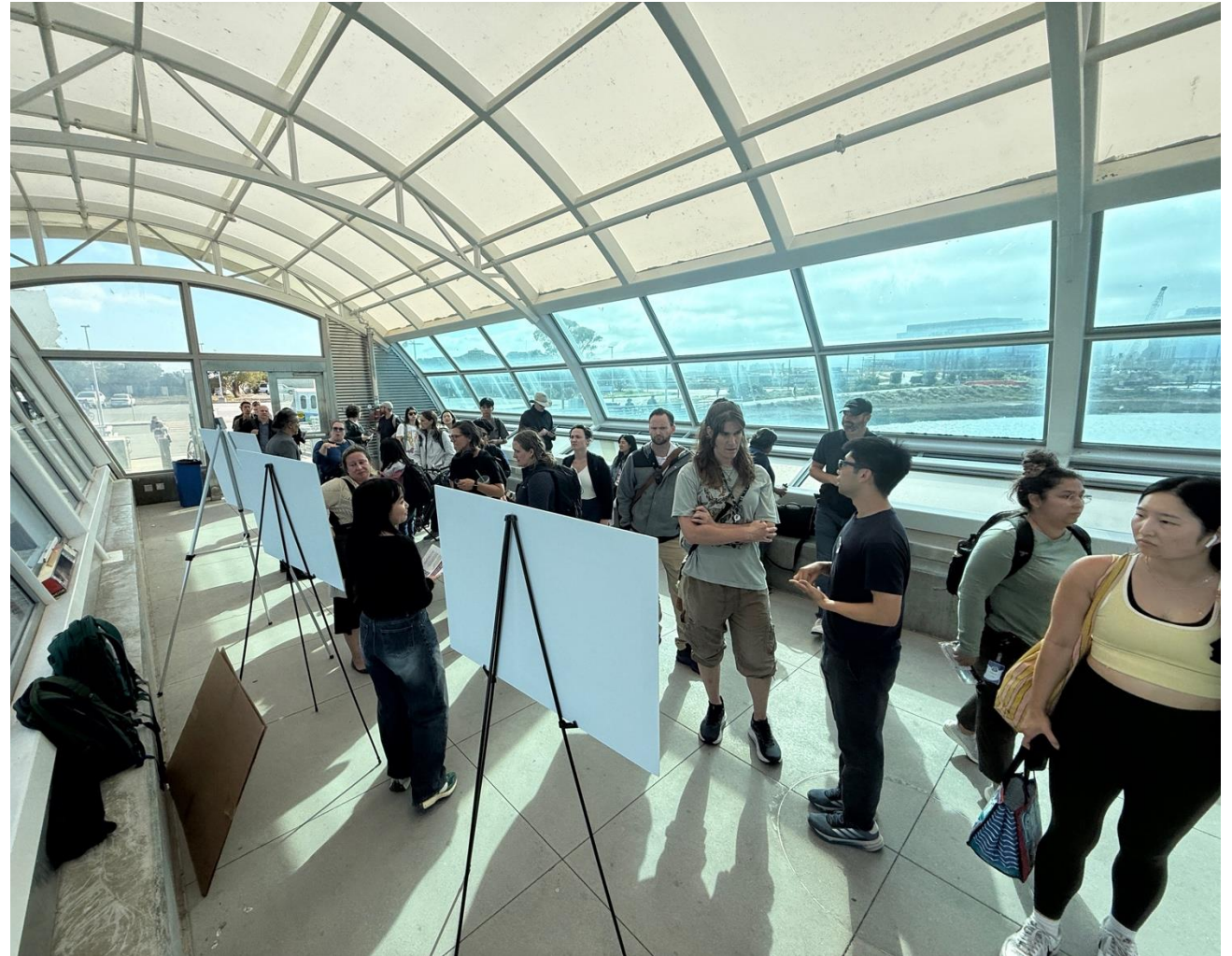
December 2025

BACKGROUND

The Study was initiated in July of this year with the purpose to identify a preferred service and funding plan to ensure:

- Financial feasibility of water transit serving South San Francisco
- Increase service productivity
- Establish a sustainable runway of operating funds.

The Study has been undertaken through a collaborative process involving identified Working Group partners and public outreach.



IDENTIFIED STUDY PARTNERS

Government



Business

Genentech



AMGEN

stripe

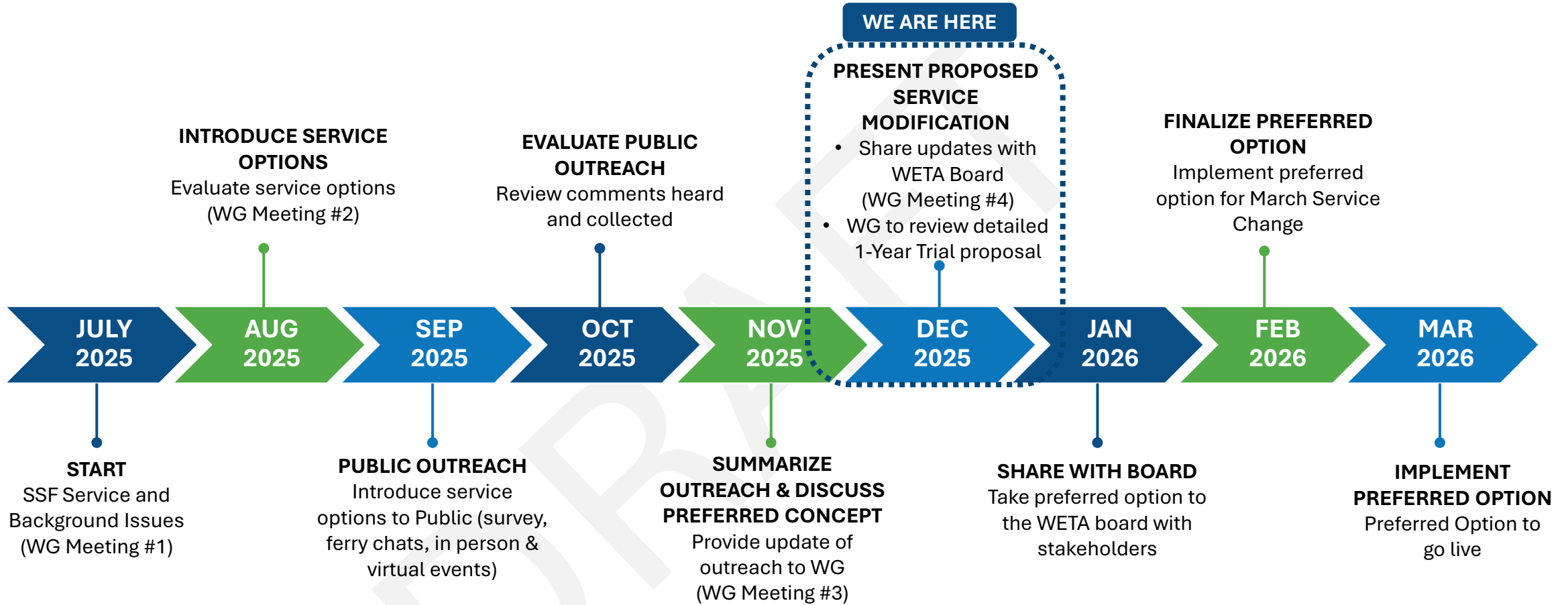
abbvie

Community

THE SAN FRANCISCO Peninsula



STUDY TIMELINE



OVERVIEW OF PUBLIC OUTREACH EFFORTS

During the month of September, SF Bay Ferry Staff implemented the following Public Outreach initiatives to facilitate public input on improving the financial sustainability of the SSF Service as well as meeting rider needs.

FERRY CHATS

Two ferry chats were conducted during the AM commute to engage with current riders.

EVENTS

- An in-person event at the South San Francisco Ferry Terminal was held on Sept 25th.
- A virtual event was held on Sept 26th.

SURVEY

A public survey was conducted from September through early October 2025, receiving over 1,500 submissions.

WEBSITE

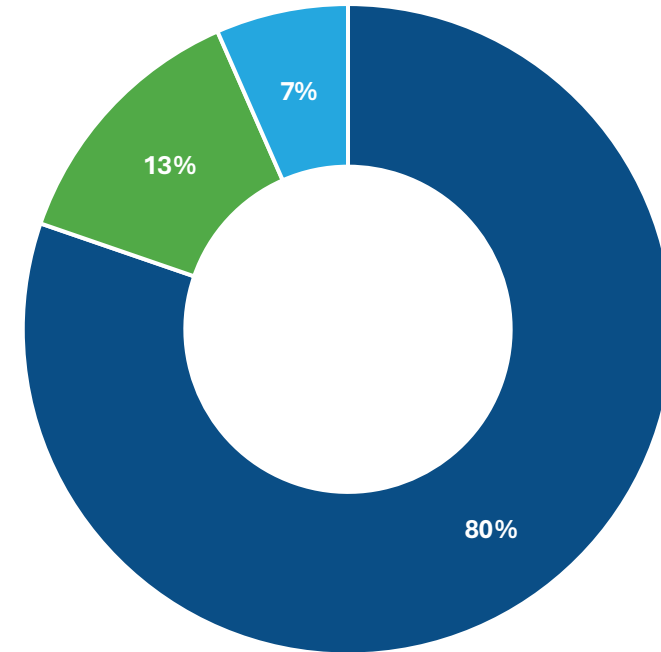
A public facing [website](#) is available for providing project overview, updates and e-mail sign up for future news. Also included a link to the survey.

SSF SERVICE STUDY SURVEY

A survey was available to the public from September 5th to October 8th, 2025. The survey was shared via:

- Display boards on vessels serving the SSF route
 - Project Website: <https://sanfranciscobayferry.com/south-sf-study/>
 - Technical Advisory Working Group (TAWG) members and their networks
 - Various SFBF Social Media Platforms
 - In-person tabling at the SSF terminal
 - In-person flier distribution and outreach on board the SSF ferry
- Survey catered towards both riders and non-riders
 - Total of 1,534 responses
 - 1,384 survey takers weighed in on the potential service and operational changes
 - People who are not ferry riders, not SSF workers, not San Mateo County residents were not asked the questions regarding potential service and operational changes proposed for study.

Composition of Survey Respondents



- Ferry Riders (1,111)
- Non-Ferry Riders who work in SSF (182)
- Non-Ferry Riders who don't work in SSF, but live in San Mateo County (91)

Disclaimer: Unscientific survey, not designed to be a statistically significant and random sample.

PROPOSED ROUTE CHANGE OPTIONS

REVIEW OF ROUTE CHANGES



REMOVE MAIN ST. ALAMEDA STOP:

- Enhances current service efficiency by eliminating the Main St. Alameda Stop and leverages existing water shuttle service
- Increases service between East Bay and South SF



CONNECT DOWNTOWN SF AND SOUTH SF:

- Transition SSF service from East Bay to SF
- Creates new market for other ferry routes and transit connections
- Provides service to Downtown SF for South SF residents and adjacent communities

REVIEW OF OPERATIONAL CHANGES

PROPOSED OPERATIONS CHANGE OPTIONS

FARE INCREASES:

- Creates financial viability of the South SF Service
- Straightforward implementation

VESSEL/OPERATOR CHANGE:

- Shift burden of operational costs to a private operator
- Support financial viability, given vessel and operator qualifications

4-DAY SERVICE:

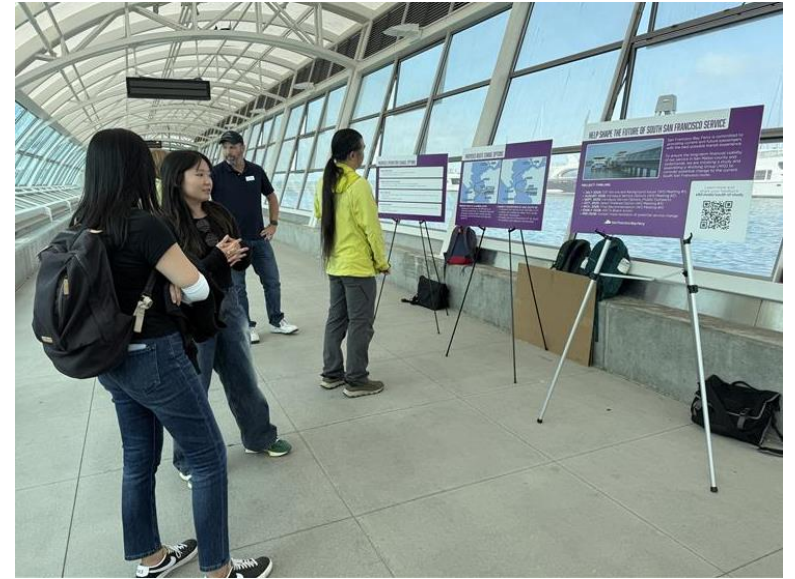
- Cost savings (fuel savings of 20%) while matching ridership patterns of Tues.-Thurs. commutes
- Straightforward implementation

PARTNER SUBSIDY:

- Utilizing public or private subsidy to fill funding shortfall compared to other SF Bay Ferry routes
- Support financial viability

OUTREACH REVIEW

- Strong desire to maintain direct East Bay – South SF service.
- Support for fare increases or reduced schedule.
- Completely eliminating stops at Main St. was unpopular, particularly among Alameda riders.
- Replacing current service with Downtown SF – SSF service was unpopular, particularly among Oakland riders.
- Free employee parking in Oyster Point is a major factor for those who drive to SSF.
- San Mateo County residents showed limited enthusiasm for a SSF to SF ferry service.



PREFERRED CONCEPT: SCHEDULE MODIFICATIONS

- **1-Year Trial** – following Board approval, implement a 1-year trial of the South SF route beginning in March 2026. The trial will operate with the following parameters:
 - Maintain some stops at Main St. Alameda
 - Adjust Oakland Alameda Water Shuttle (OAWS) schedule to align with SSF ferry departures and arrivals
 - Optimize SSF ferry schedule to accommodate needs of Oyster Point employees
 - Maintain current fare rate in accordance with SFBF's fare policy
 - Conduct SSF route-specific marketing and promotion
 - Identify amount of partner subsidy required to support long-term financial sustainability
- **Performance metrics for the Service** – staff will develop goals and metrics tied to the financial sustainability of the service. If the service continues to underperform relative to other routes at the end of the trial in March 2027, this will trigger a local partner subsidy or substantial cost-saving measures.
- **Detailed Proposal for the Pilot** – staff will present the final detailed proposal to the technical working group at its 4th meeting in December and to the WETA Board in January 2026.

Thank you



Item 10: 2050 Business Plan Update



Business Plan – Board Update

December 11, 2025



bayferry2050.org

Overview



2050 Service Vision & Business Plan Overview

• 2050 Service Vision & Expansion Policy

- Stakeholder & Public Outreach
- Scenario Development & Network Evaluation
- Service Vision & Expansion Policy
- Supportive Policies
 - Fare Policy
 - Terminal Access Guidelines
 - Sustainability Policy
 - Plan Bay Area 2050+
 - SB 63 Proposal

• Business Plan - Volume 1

- 2050 Service Vision
- Role in the Region
 - Regional Ferry Network
 - Emergency Response
 - Environmental Stewardship
 - Community Connections
 - Economic & Workforce Development
 - Organizational Capacity
 - Financial Capacity
- Implementation Strategies

• Business Plan - Volume 2

- Long-term Operating Outlook
- Long-term Capital Outlook
 - Service Plan
 - Operating Plan
 - Fleet Plan
- Financial Plan
 - Service Operations
 - Capital Plan



Initial Capital Plan Scenarios

A) Focus on REEF

- Phases 1-3 of REEF Program
- Limited funding for Expansion & Enhancement
- \$417M need; 1:18 RM3 funding leverage

B) Modified REEF Program

- Phases 1-2 of REEF Program
- Limited funding for Expansion & Enhancement
- \$244M need; 1:4.5 RM3 funding leverage

C) Modified REEF Program + Expansion/Enhancement

- Phases 1-2 (partial) of REEF Program
- Additional funding for Expansion & Enhancement
- \$180M need; 1:4.3 RM3 funding leverage

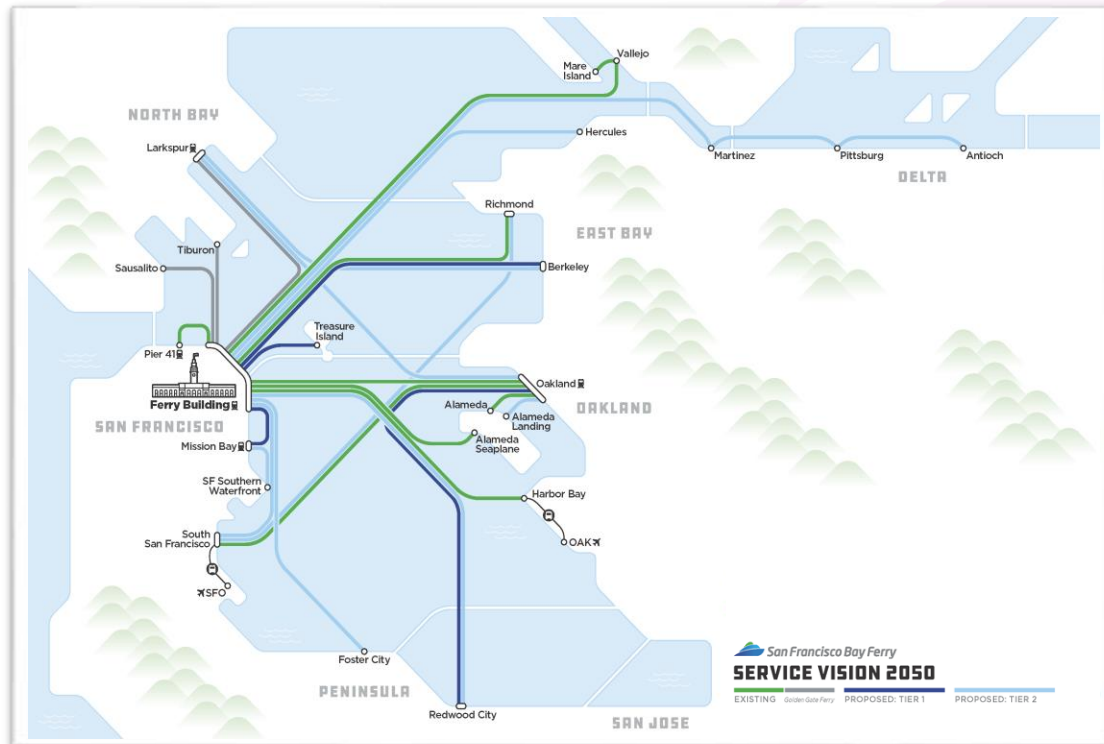
Challenges & Risks



Achieving the 2050 Service Vision

- **Network Map: “The Where”**

- **Policy: “The If, When and How”**



Expansion Policy

The planning and development milestones for system expansion are indicated in **Appendix Figure 2**. An initial feasibility study and subsequent business plan, prepared in collaboration with WETA and its project partner(s), must determine that a potential project is likely to meet the requirements and criteria defined below prior to advancement of WETA's planning and development process, which includes investment in design, environmental review, permitting, property acquisition, construction, and ultimately operation.

1. *Project Memorandum of Understanding* - All candidate expansion projects will enter into a Memorandum of Understanding (MOU), executed by the WETA Board and the public governing body of the local partnering jurisdiction(s). Expenses related to the initial feasibility study and business plan will be the responsibility of the local partner. WETA will contribute in-kind staff time as part of the project team. The MOU will be amended and updated accordingly as the project progresses through the development process.
2. *Financial Sustainability* - Major capital investments to expand the WETA system will require a dedicated source of funds to fully subsidize operations for a minimum of 10 years. Operation expense categories include labor and fuel; vessel O&M, which includes maintaining a fleet of spare vessels; facility O&M, which includes terminal facilities and their associated upkeep costs; system administration costs, which are required to support the service on an annual basis; and any periodic maintenance dredging work, to maintain operations, if it is required.

Regional Measure 3 Capital Funds

- **\$300 million total in RM3 capital funds**
- **\$102.8 million allocated to date**
 - Mission Bay Ferry Terminal – \$26 million
 - Berkeley Pier/Ferry Project – \$3 million
 - Zero-Emission Vessels – \$38 million
 - Hydrus Zero-Emission Conversion – \$9 million
 - UCF (Seaplane) – \$16.2 million
 - UCF (Gate G) – \$10.3 million
- **\$12.7 million anticipated FY 2027 allocations**
 - UCF and shoreside infrastructure (Harbor Bay)
- **Successful leveraging to date**
 - Over \$400 million of external funds secured



State-of-good Repair

- **Fix-it-first**
 - Long-term rehabilitation and replacements needs prioritized over investment in new capital
- **Greater Need**
 - System fleet and facilities are planned to expand
 - Potential savings with electric vessels
- **Limited Funds**
 - Federal funds provided to region are scarce
 - New funds needed as early as FY 2027
- **RM3 Capital Funds**
 - Up to \$150 million could be required to meet needs



Other Challenges and Risks

- **Funding vulnerability**
 - Politicization of existing and future funds sources
- **Increased costs**
 - Significant industry-wide cost increase for new vessel and infrastructure
 - Domestic markets for zero emission technologies underdeveloped
- **Alternate Compliance Emission (ACE) Plan**
 - Plan conformity will need to be ensured
- **Operating experience**
 - New vessel and infrastructure technologies will need to be validated and, if necessary, adjusted to ensure program goals are met

Capital Plan



Capital Plan – Preferred Concept

- **State-of-Good Repair**
 - Asset rehabilitation and replacement needs are met through FY 2037
- **REEF Phase 1**
 - Full delivery
 - New terminal and vessels to support Treasure Island and Mission Bay services
- **REEF Phase 2**
 - Partial delivery
 - Transition of up to two existing routes to zero-emissions operation
- **Other REEF projects**
 - Planning work continues for remaining REEF Phase 2, 3 and 4 projects
 - Delivery is deferred unless additional funding is identified



Capital Plan Preferred Concept (Cont.)

- **Fleet Expansion & Enhancement**

- Three new 150 passenger zero emission vessels
- Conversion of existing vessels to zero emissions
- Up to four new 320-400 passenger zero emission vessels

- **Service Enhancement**

- Frequency or vessel capacity upgrades on up to two routes
- Continue to monitor and plan for other enhancement opportunities

- **Service Expansion**

- Launch 75% of 2050 Service Vision Tier I routes
- Planning work continues for Tier II routes



RM3 Leveraging Overview

- **Current Program to Date**
 - \$115M → \$438M or 1:2.8
- **Capital Program Scenarios**

	Remaining RM3 Capital Funds	Total Funding Need	Leveraging Factor
Scenario A	\$ 22,000,000	\$ 417,000,000	18.0
Scenario B	\$ 44,000,000	\$ 244,000,000	4.5
Scenario C	\$ 34,000,000	\$ 180,000,000	4.3

RM3 Leveraging Overview

- **Current Program to Date**
 - \$115M → \$438M or 1:2.8

	Description	Remaining RM3 Capital Funds	Total Funding Need	Leveraging Factor
Scenario A	Focus on REEF	\$22 million	\$417 million	18.0
Scenario B	Modified REEF	\$44 million	\$244 million	4.5
Scenario C (Preferred)	Modified REEF + Expansion/Enhancement	\$34 million	\$180 million	4.3

- **Preferred scenario will be updated based on current assumptions through FY 2037**

Work Plan & Schedule



Work Plan & Schedule

- **December 2025**
 - Preferred Capital Plan scenario to full Board
- **December-January 2026**
 - Project team finalizes draft Business Plan
- **February 2026**
 - Draft Business Plan to Subcommittee
- **March 2026**
 - Draft Business Plan to full Board
 - Initiate Public Outreach Process
- **April 2026**
 - Final Business Plan to full Board



Questions

