

Baltimore Region Transit-Oriented Development Strategy

Unlocking value and maximizing
the return on investment in
Baltimore's existing high-capacity rail
infrastructure

April 2026





STATEMENT OF PURPOSE

The Maryland Department of Transportation (MDOT) is poised to make historic investments in the existing Baltimore Metro and Light Rail systems. MDOT has secured more than \$2.0 billion for rail infrastructure improvements, including:

- » \$1.4 billion for a Light Rail modernization program that will bring modern cars and stations to the network.
- » \$500+ million for the Metro system that will include the onboarding of new Metro vehicles.

These investments will usher in a new day for transit in the Baltimore region by expanding capacity, reliability, and rider experience.

To maximize the return on these investments and realize the full benefits they bring, an ambitious effort to support dense, mixed-use transit-oriented development (TOD) around these stations must be put forward. Doing so will increase ridership, support economic development, and provide opportunities for residents of the Baltimore region to live and work near transit. MDOT's Office of Real Estate and Economic Development (ORED) has led a series of workshops with state and local jurisdictional partners to strategize how to advance TOD in the Baltimore region.

As the state seeks to address the housing and affordability crisis, TOD can play a key role by:

- » Reducing pressures on the transportation system and giving people more transportation choice.
- » Reducing transportation costs, which are the second-highest cost for a household after housing.
- » Producing new housing in high-opportunity locations with regional accessibility.
- » Providing localities with new tax base and communities with jobs and economic development.

Realizing this new investment will require focused efforts to streamline and advance new housing investment near transit. As this report demonstrates, the Baltimore region has tremendous TOD potential near its existing high-capacity rail network.

This strategy document identifies the opportunities and challenges to realizing TOD and provides a call to action for how MDOT, other state agencies, and local jurisdictions will partner on pursuing this development. It also makes the necessary distinction of the roles each partner plays in supporting TOD when considering land ownership, land use controls, and the deployment of financial tools that will be critical to success.

While this strategy is focused on the existing high-capacity rail transit network in the Baltimore region, the approach to partnership is applicable to TOD opportunities throughout the state and across modes of transportation such as high-capacity bus service. As MDOT looks to advance TOD initiatives statewide, this strategy serves as a roadmap not only for the Baltimore region but also in other areas where transit exists or is planned. In all cases, a well-structured partnership among the state, local jurisdictions, and the communities they serve will be critical to making the state of Maryland a leader in housing affordability, economic and community development, and transportation.

As Governor Moore and the Maryland Department of Transportation make historic investments in transit for the Baltimore region,

THE TIME IS NOW TO REALIZE THE OPPORTUNITY FOR TRANSIT ORIENTED DEVELOPMENT.

In the development of MDOT-owned transit adjacent land alone, the region could realize almost 1,600 new housing units, 1.6 million square feet of new development and over \$500 million in state and local tax revenue in addition to over 400,000 new MTA Metro and Light Rail riders.

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EXECUTIVE SUMMARY

TRANSIT-ORIENTED DEVELOPMENT (TOD)

Development of compact, walkable communities centered around transit stations that attract new residents, workers, and visitors.

ROLES

MDOT

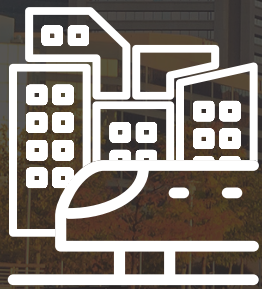
- » Provide reliable transit service
- » Provide technical assistance to help overcome barriers

LOCAL JURISDICTION

- » Set land use and zoning policy
- » Engage with the local communities in land use and zoning matters
- » Control key financial tools to support development feasibility
- » Oversee project approvals and entitlement

PRIVATE DEVELOPER

- » Identify project opportunity and gain site control
- » Work with state and local partners in engaging local communities
- » Get project entitled and approved to begin development



Future Opportunity for Transit-Oriented Development

46 RAIL STATIONS
in the Baltimore region

\$5.8- 7.0 BILLION

in new Local Tax Revenues
(30-Year NPV)

42,000-50,000
new housing units

49-59 MILLION SF
of development

JOINT DEVELOPMENT

A specific type of TOD on MDOT/MTA-owned property that requires coordinated construction of public transit facilities (e.g., commuter parking and bus bays) with private development.

ROLES

MDOT

- » Initiate project scoping and confirm feasibility
- » Identify private development partner and execute Master Development Agreement

LOCAL JURISDICTION

- » Set land use and zoning policy
- » Engage with the local communities in land use and zoning matters
- » Control key financial tools to support development feasibility
- » Oversee project approvals and entitlement

PRIVATE DEVELOPER

- » Respond to MDOT solicitation
- » Execute Master Development Agreement with MDOT
- » Advance design and development plan
- » Get project entitled and approved.



Future Opportunity for Joint Development

17 RAIL STATIONS
in the Baltimore region

\$600-690 MILLION

in new Local Tax Revenues
(30-Year NPV)

4,000 - 5,000
new housing units

5-6 MILLION SF
of development

WHY NOW?

The state of Maryland is making a historic investment in Baltimore's existing Metro, Light Rail, and CityLink Bus system. TOD and joint development will maximize the return on investment in transit infrastructure.

DOES MDOT DO THIS ON ITS OWN?

No, supporting TOD requires close coordination with local jurisdictions, private developers, and community members. In fact, MDOT has very little control over development on property not owned by the state.

TOOLS OF FOCUS

ZONING

OPPORTUNITY ZONES

TAX ABATEMENT

ENTERPRISE ZONES

TAX INCREMENT FINANCING

PUBLIC USES ANCHORING TOD SITES

MEDCO STRATEGIC INFRASTRUCTURE LOAN FUND

STRATEGIES TO ACCELERATE TOD AND JOINT DEVELOPMENT

LOCAL JURISDICTION

1. UPDATE LAND USE AND PLANNING TO SUPPORT TOD
2. IMPLEMENT TOOLS TO OVERCOME FINANCIAL FEASIBILITY BARRIERS AND SUPPORT ENABLING INFRASTRUCTURE

MDOT

3. FORGE STRATEGIC PARTNERSHIPS
4. INCREASE DEVELOPMENT READINESS OF MDOT/MTA-OWNED SITES

CURRENT PRIORITIZATION OF RESOURCES

Properties with TOD-supportive zoning already in place.



1

BACKGROUND AND CONTEXT

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THE VISION

The Baltimore region is anchored by a rail network with untapped potential to drive connected growth that supports economic development and new housing across the region. MDOT, which includes the Maryland Transit Administration (MTA) and State Highway Authority (SHA), in coordination with local government partners in the City of Baltimore, Baltimore County, and Anne Arundel County, are seeking to accelerate two types of development around existing, high-capacity rail stations in the Baltimore region: transit-oriented development (TOD) and joint development.

» **Transit-oriented development (TOD)** is the development of compact, walkable communities centered around transit stations, attracting new residents, workers, and visitors. TOD can include development on privately owned land, which is typically driven by private developers, as well as on publicly owned land, where it is driven by local jurisdictions or state, usually in partnership with a private developer. **In these situations, the challenge is to bring the market to these sites.**

» **Joint development** is a special type of TOD that occurs on publicly owned land and combines public and private investment. In Baltimore, these sites are owned by MDOT/MTA and are referred to in the remainder of this report as MDOT/MTA-owned sites. These sites can support projects that consolidate transit facilities and deliver new housing, offices, retail, public amenities, and other uses directly on MDOT/MTA-owned land adjacent to stations. Joint development is commonly used as an action to achieve TOD by transit agencies across the country including the Massachusetts Bay Transportation Authority (MBTA), New Jersey Transit, the Washington Metropolitan Area Transit Authority (WMATA), the Metropolitan Atlanta Rapid Transit Authority (MARTA), and others. **In these situations, MDOT has the ability to bring these sites to the market for development.**

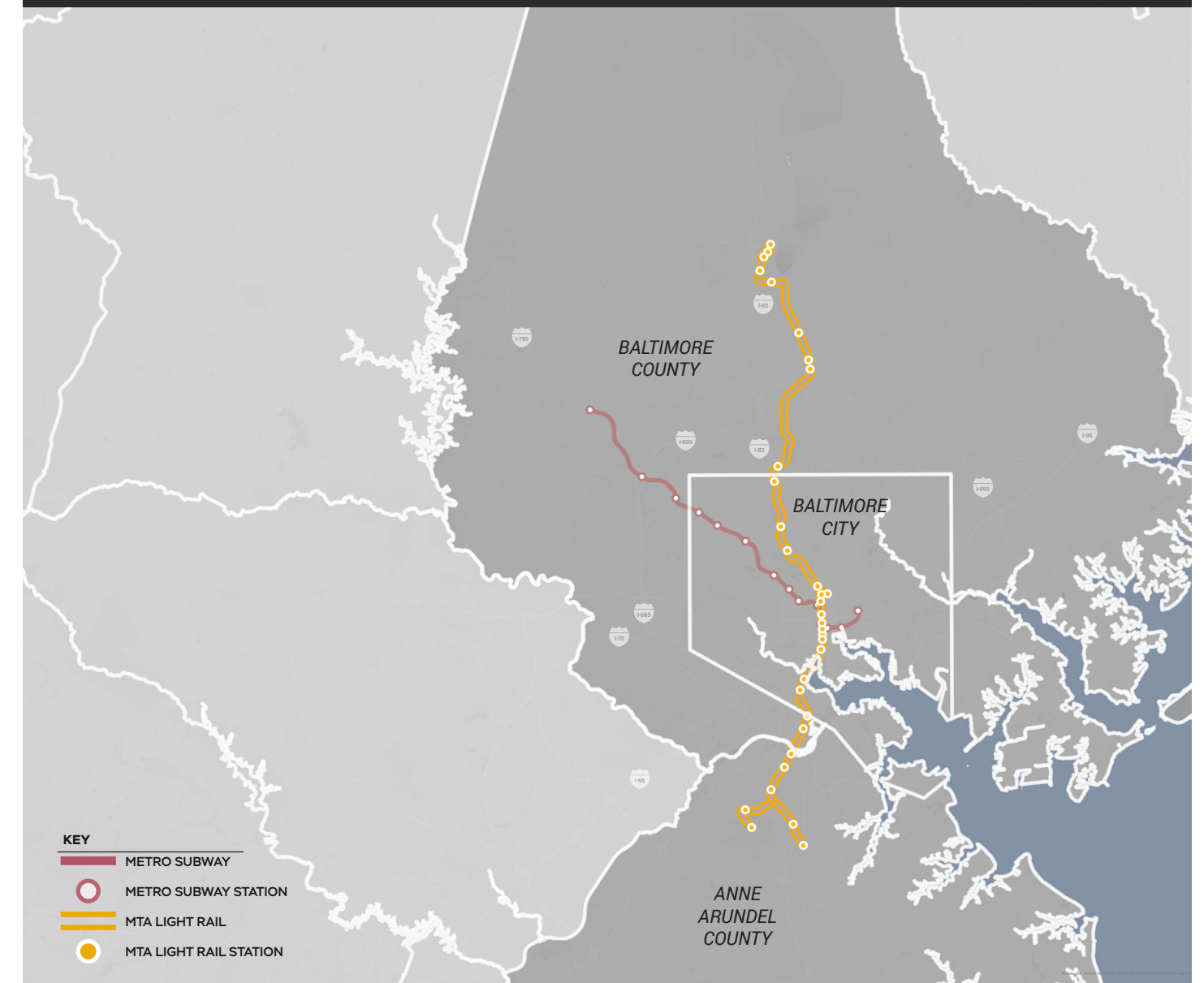
This strategy is focused on the future of Transit Oriented Development in the Baltimore region and sets the foundation for TOD partnerships statewide. The analysis of opportunities is based on site characteristics and general, current market conditions. **It is a roadmap for where and how TOD could occur in the region.** This strategy recognizes that the demand to drive development at these sites is based on many factors related to economic growth and this strategy is not a substitute for the need for ongoing coordination on economic development at the local, state, and federal levels.

Baltimore operates the 12th largest transit system in the United States and supporting joint development and TOD represents a critical return on investment for the state. MDOT is currently advancing more than \$2.0 billion of capital investment into the Baltimore Metro and Light Rail Systems, which includes new Metro cars and a complete modernization of the Light Rail system. Creating an environment that fosters new TOD near stations to support economic and community development, address the state's housing shortage, and promote sustainability will maximize the impact of investment in existing transit infrastructure.

Harnessing underutilized land around stations for strategic development benefits MDOT, local jurisdictions, and the region by:

- » **Increasing transit ridership and revenue from new residents and workers,**
- » **Bringing housing, jobs, and amenities to transit-accessible locations, and**
- » **Generating new local and state tax revenue on formerly undeveloped and untaxed land.**

DEFINING THE BALTIMORE REGION



This report focuses specifically on neighborhoods and corridors within the Baltimore region with existing high-capacity transit—Metro, and Light Rail. It includes the City of Baltimore as well as portions of Baltimore County and Anne Arundel County. Given the historic infrastructure investments being made into this existing network, these locations offer opportunity to align mobility improvements with broader economic development, land use, and sustainability goals. This network connects to the CityLinks bus service as well as the MARC commuter rail network connecting Baltimore to Washington DC.

There are two ongoing projects within the region that are not included in this strategy: West Baltimore and State Center. Each of these locations has separate and specialized planning efforts underway.

MDOT and MTA are continuing to advance TOD efforts across the state, including along the future Red Line and the MARC system—exemplified by activities at the Odenton and Bowie State stations along the MARC Penn Line. Implementation strategies presented within this report are applicable to other locations throughout the state and offer precedent for considering approaches to TOD opportunities elsewhere.

HISTORY AND POTENTIAL

Since opening in 1983, Baltimore’s rail transit infrastructure has enhanced regional accessibility and shaped regional growth. Throughout the years, MDOT has worked with local government partners to advance joint development projects at key stations including Symphony Center, Owings Mills Metro and Reisterstown Plaza Metro—demonstrating how transit assets can be leveraged to support mixed-use development and community reinvestment.

There is opportunity to accelerate TOD and joint development, and MDOT has sharpened its focus on unlocking the full potential of transit-adjacent real estate. In the Baltimore region, MDOT and local jurisdictional partners are well-positioned to catalyze TOD by leveraging publicly owned land near transit stations through joint development projects, and by creating the right conditions to support TOD throughout the region. A new generation of transit-connected, high-impact development across the Baltimore region could produce:

Transit-oriented development near existing high-capacity rail stations

- » 49-59 million square feet of development
- » Up to 50,000 housing units

Joint development on MDOT/MTA-owned land near existing high-capacity rail stations

- » 5-6 million square feet of development
- » Up to 5,000 housing units

While TOD and joint development provide clear benefits, realizing this opportunity requires overcoming existing challenges to new investment. Joint development often includes station infrastructure such as commuter parking or bus facilities that require replacement. And for all TOD, infill development is typically more difficult and expensive than greenfield development. Additionally, stations across the region have varied real estate market conditions and zoning policies that can limit the ability to support TOD-conducive uses. If developed for private uses, MDOT/MTA owned land is subject to the control of local zoning. Overcoming these barriers is key to maximizing the full potential of TOD and strengthening the importance of the region’s rail service.

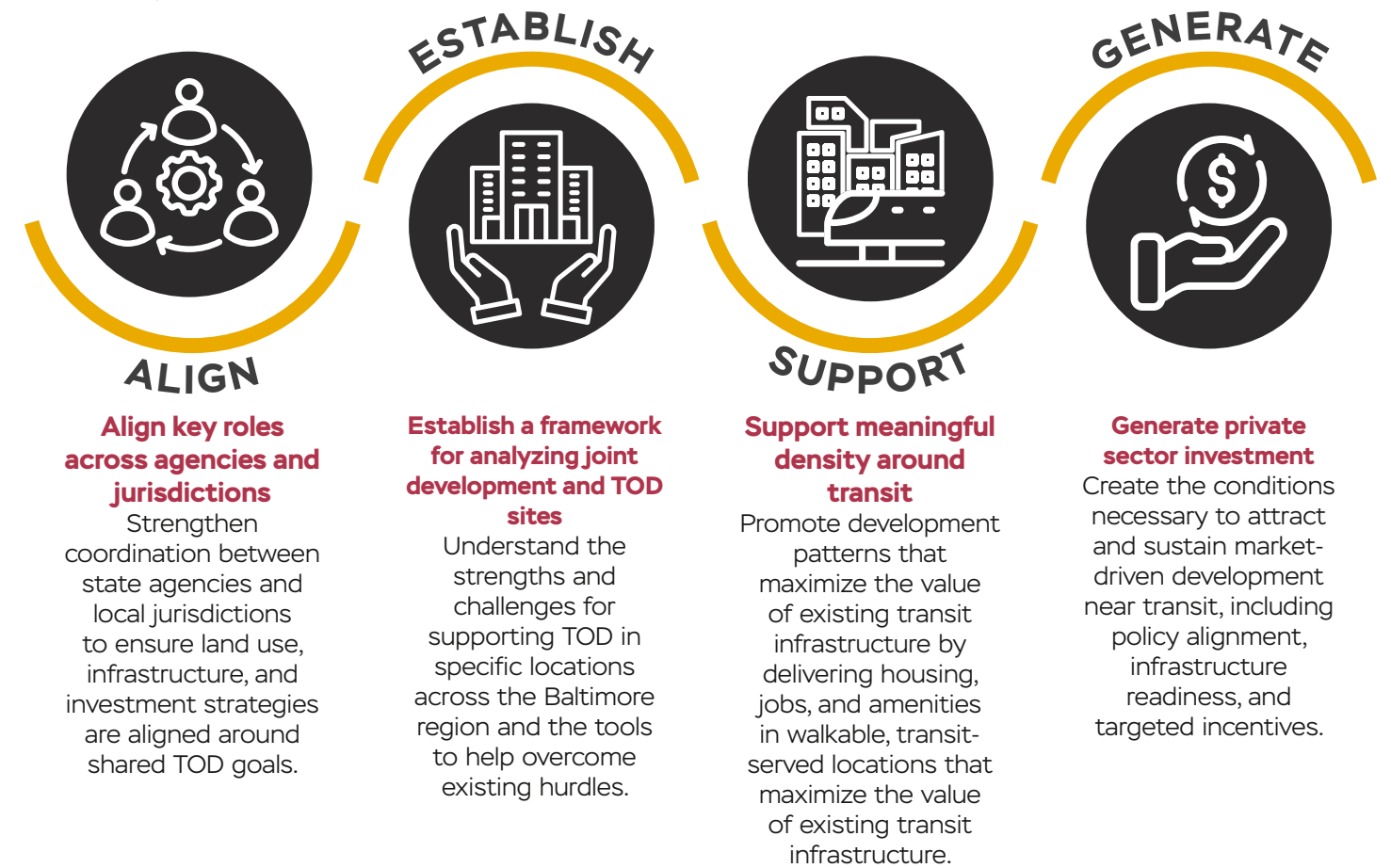


Historic Metro Train | Image provided courtesy of MDOT

PURPOSE

Successfully accelerating joint development and TOD across the Baltimore region requires support and close coordination with local government partners – the City of Baltimore, Baltimore County, and Anne Arundel County. MDOT and its local government partners each play a role in supporting TOD and have access to different tools and policies. In developing this strategy, MDOT has worked closely with its local government partners to evaluate the opportunity for joint development and TOD and assess the specific tools and approaches that can overcome identified challenges.

This strategy will guide MDOT and its local jurisdictional partners in leveraging transit infrastructure to deliver walkable development, providing new housing and jobs. The strategy is grounded in four core objectives:



This strategy also identifies a toolkit of policies to support TOD and joint development. While only select tools will be applicable in a given station area, understanding the range of tools that generate the most impact for supporting new private investment is critical. The tools included as part of this strategy are:

- » Zoning
- » Opportunity Zones
- » Tax increment financing (TIF)
- » Enterprise Zones
- » Tax abatement/PILOT
- » MEDCO Strategic Infrastructure Loan Fund
- » Public uses anchoring TOD sites

DEVELOPMENT POLICIES AND PROJECT CYCLE

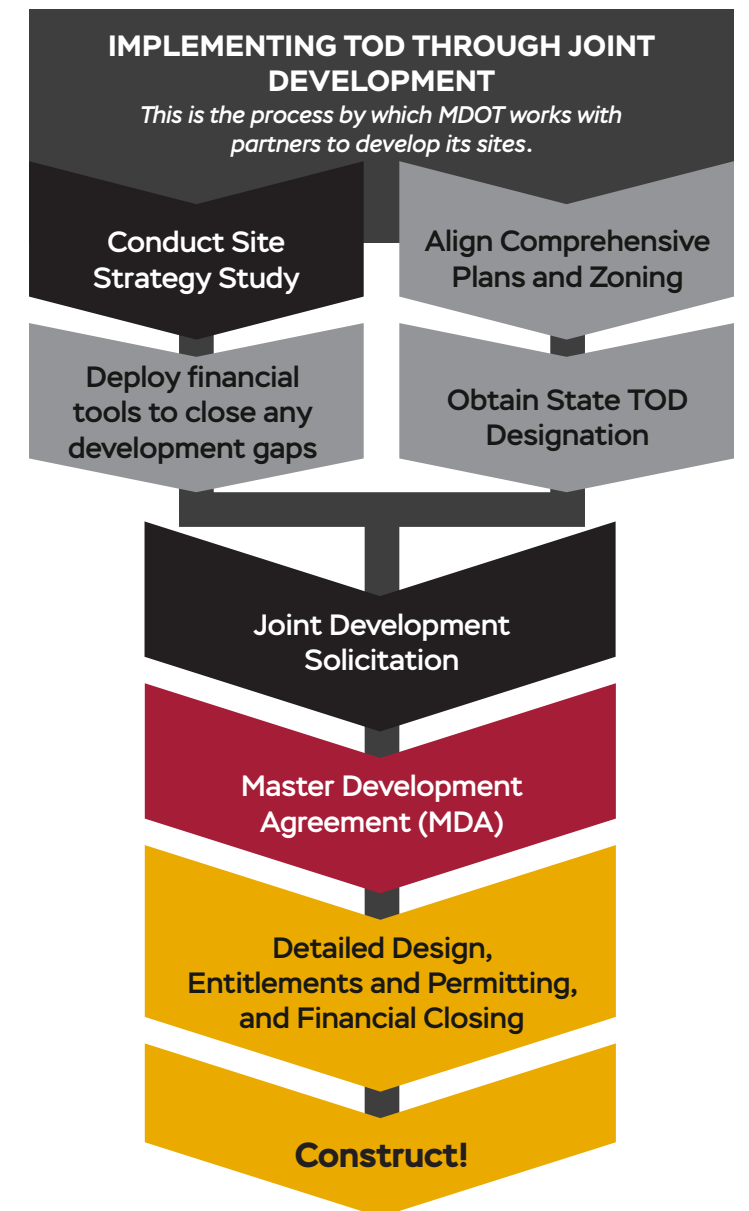
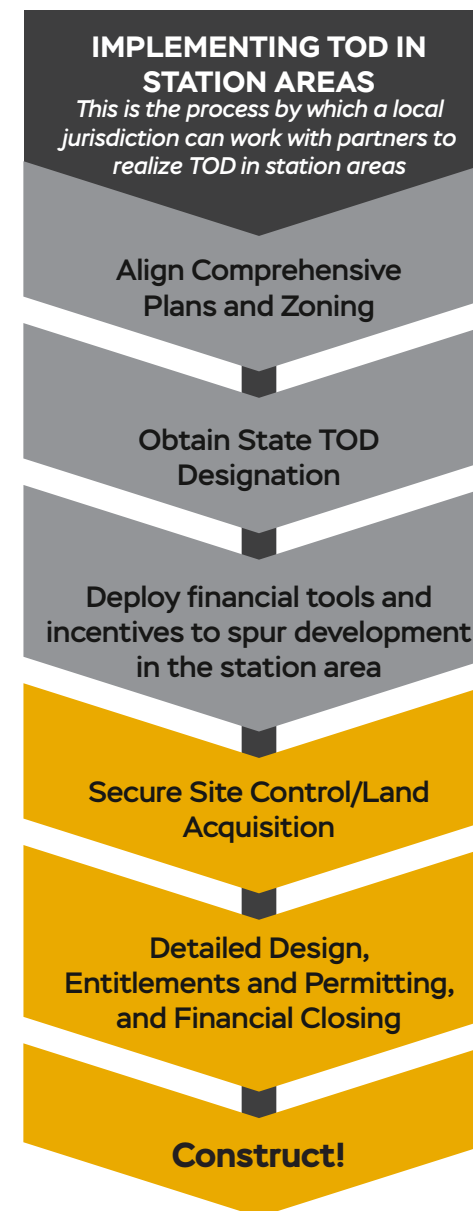
TOD and joint development leverage transit infrastructure to support walkable and active communities with new housing at a range of prices and new jobs. While both aim to concentrate development near transit, TOD on a privately owned site differs from joint development not only in terms of land ownership, but also in development process and public sector involvement.

	TOD on Private Property	Joint Development
Land Ownership	Private	MDOT/MTA
Land Use/Zoning Controls	Local Government	
Development Initiator	Private Developer	MDOT
Public-Private Agreement	None	Agreement Between MDOT and Private Developer
Transportation Infrastructure Requirements	None	Specific station needs such as commuter parking, bus facilities, and pick up/drop off areas
Private Development Uses	Housing, Office, Retail, etc.	
Construction Lead	Private Developer	

Note: Local jurisdictions may also leverage land they own for redevelopment, the process for which is not detailed in this report since it is dependent on local policies and processes and varies by location.

In the State of Maryland, transit-oriented development (TOD) generally refers to dense, mixed-use development in the ½ mile radius around a transit station. On privately owned land, these projects are typically led by private developers and shaped by local government land use policies, zoning, and infrastructure conditions. Local governments provide project entitlements and approvals to the private developer. MDOT and MTA have little direct control in supporting TOD on privately owned land. Their roles are to provide reliable transit service and create an environment supportive for investment. However, through its Office of Real Estate and Economic Development (ORED), MDOT does provide technical assistance and small financial tools to help private developers overcome barriers and catalyze TOD.

Joint development occurs on MDOT/MTA-owned land adjacent to stations and involves a formal partnership between MDOT and private developers. MDOT leads the initial stages of the process, coordinating on TOD strategy and confirming all replacement transportation infrastructure required for the site. MDOT then seeks a private sector development partner through a joint development solicitation request for qualifications (RFQ) or request for proposals (RFP). Upon selection of a development partner, MDOT and the private developer execute a Master Development Agreement. The private developer then leads project design and financial closing before beginning construction.



Lead: MDOT Public Partners MDOT and Developer Developer

THE OPPORTUNITY

Promoting TOD and joint development across the Baltimore region is a direct lever for advancing state priorities, as identified in Governor Wes Moore’s 2024 Moore-Miller Administration State Plan. TOD supports a wide range of statewide priorities by concentrating housing, jobs, and amenities near transit. It helps drive economic growth, expands access to affordable housing, reduces greenhouse gas emissions, and supports multimodal infrastructure—all while enabling more equitable access to opportunity.

	Moore-Miller State Plan Goal	How TOD and Joint Development Supports the State Plan
Transit	Enhance transit connectivity and experience to increase ridership and add value	TOD enhances transit connectivity and experience by increasing ridership and adding value to existing and future transportation investments. Strategic development near stations makes transit more accessible and more utilized
Economic Development	Generate \$2.3B in tax revenue over 30 years	TOD drives new property, income, and sales tax revenue and connects businesses to talent
Housing	Grow Maryland’s population through mixed-income communities and more affordable housing	TOD delivers new housing stock, including affordable units, by leveraging MDOT/MTA-owned land near transit. This supports population growth and the creation of mixed-income communities.
Climate Change	Reduce VMT per capita by 20% by 2050 and GHG emissions by 60% by 2031	TOD reduces auto-dependency by increasing access to alternative transportation modes. This supports the state’s goals to cut Vehicle Miles Traveled (VMT) per capita by 20% by 2050 and reduce greenhouse gas emissions by 60% by 2031.
Bike, Pedestrian, Streets	Design viable alternatives to driving	TOD enables walkable, multimodal communities by concentrating development near transit and investing in connected infrastructure.
Equity & Opportunity	Enable transportation solutions that close equity gaps	TOD expands equitable access to mass transit, connecting residents to jobs, services, and destinations while lowering household transportation costs.

TRANSIT-ORIENTED AFFORDABLE HOUSING

MDOT is committed to supporting affordable housing efforts as part of TOD efforts across the Baltimore region and all joint development projects must, at minimum, comply with local affordable housing requirements. This commitment reflects the priorities of the Moore-Miller administration, which has emphasized equitable growth, multimodal access, and climate resilience as pillars of Maryland’s development agenda. Locating affordable housing near transit infrastructure reduces household transportation costs and improves access to employment and services. At the same time, increased residential density near transit stations increases ridership and contributes to the long-term sustainability of transit systems. These complementary outcomes underscore the value of integrating housing and transit planning to promote inclusive, connected communities throughout the region.

Two recent actions reinforce MDOT and the state’s commitment to housing affordability near transit:

- » In 2024, MDOT and DHCD established an agreement to channel resources and capacity to prioritize affordable housing development accessible to transit stations. These efforts will help ensure residents of a diverse range of incomes are able to live near transit.
- » In September 2025, Governor Wes Moore issued the “Housing Starts Here” Executive Order. This Executive Order reinforces the Moore-Miller Administration’s focus on addressing the state’s affordable housing issues and the importance of TOD as one solution. It also codifies the TOD partnership between DHCD and MDOT and directs MDOT to prioritize MDOT/MTA-owned land at stations for dense, mixed-use, housing development.



Image provided courtesy of MDOT | The Cold Spring Lane apartments were completed in 2024 adjacent to the West Cold Spring Metro station. The project was funded using low-income housing tax credits (LIHTC) and its 165 apartments are priced affordably.

DEVELOPABLE TOD LAND BY STATION

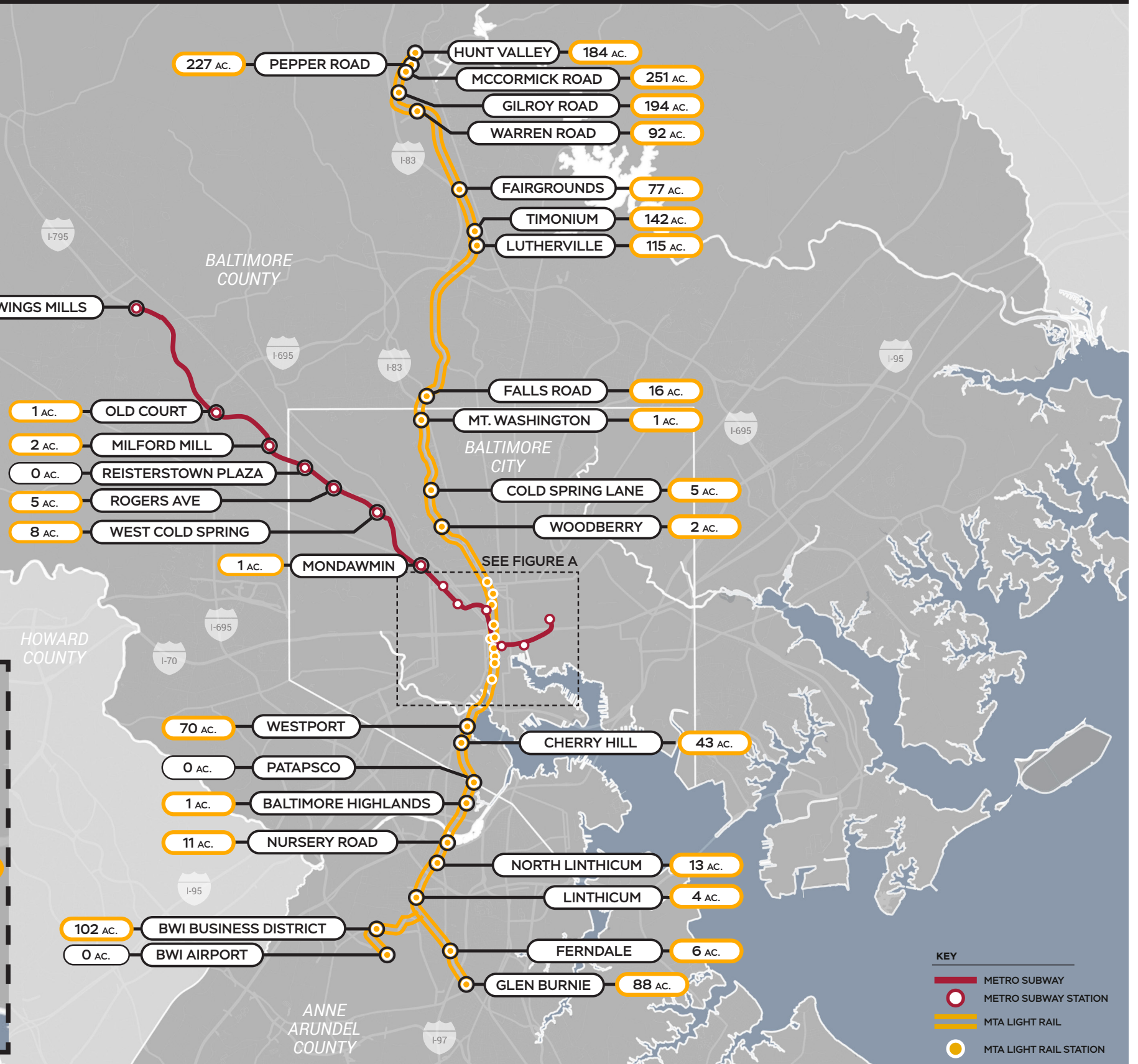
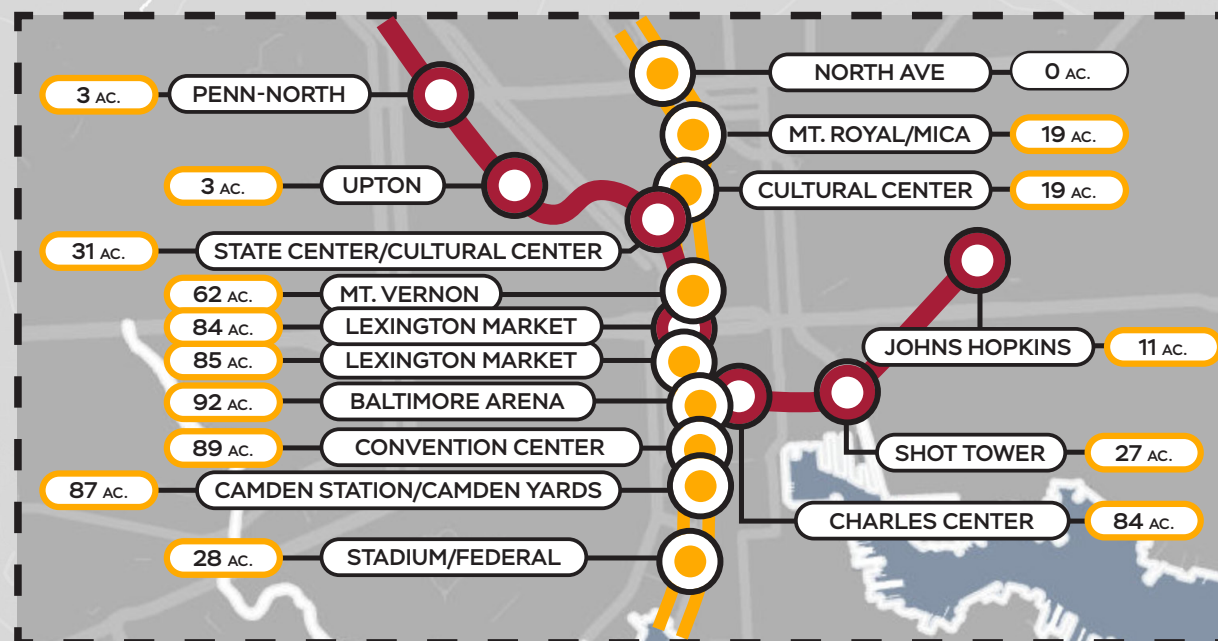
MDOT's analysis of land within a half mile of stations shows that today, more than 1,200 acres are developable for TOD. This number includes land that meets defined thresholds for zoning, market conditions, and station connectivity. While additional land is available at many stations, certain characteristics prevent it from being developed as TOD. Improvements to station connectivity, zoning, or market conditions will increase the amount of land supportive of TOD. Additional detail on the assessment of conditions in each station area is provided in Section 3 of this report and individual property information is included in Appendix A.

LAND AVAILABLE FOR TOD (ACRES)

- 279 CITY OF BALTIMORE
- 742 BALTIMORE COUNTY
- 212 ANNE ARUNDEL COUNTY

- 1,233 TOTAL

FIGURE A:



KEY
— METRO SUBWAY
● METRO SUBWAY STATION
— MTA LIGHT RAIL
● MTA LIGHT RAIL STATION

Note: Map shows the land available (in acres) for TOD in each station area, defined as a half-mile radius from the station. Given the overlap in station areas for stations in close proximity to one another, the total acreage shown for all stations sums to more than 1,200 acres. MDOT/MTA-owned land for joint development is included separately in the map shown on pages 20-21.

DEVELOPABLE JOINT DEVELOPMENT LAND BY STATION

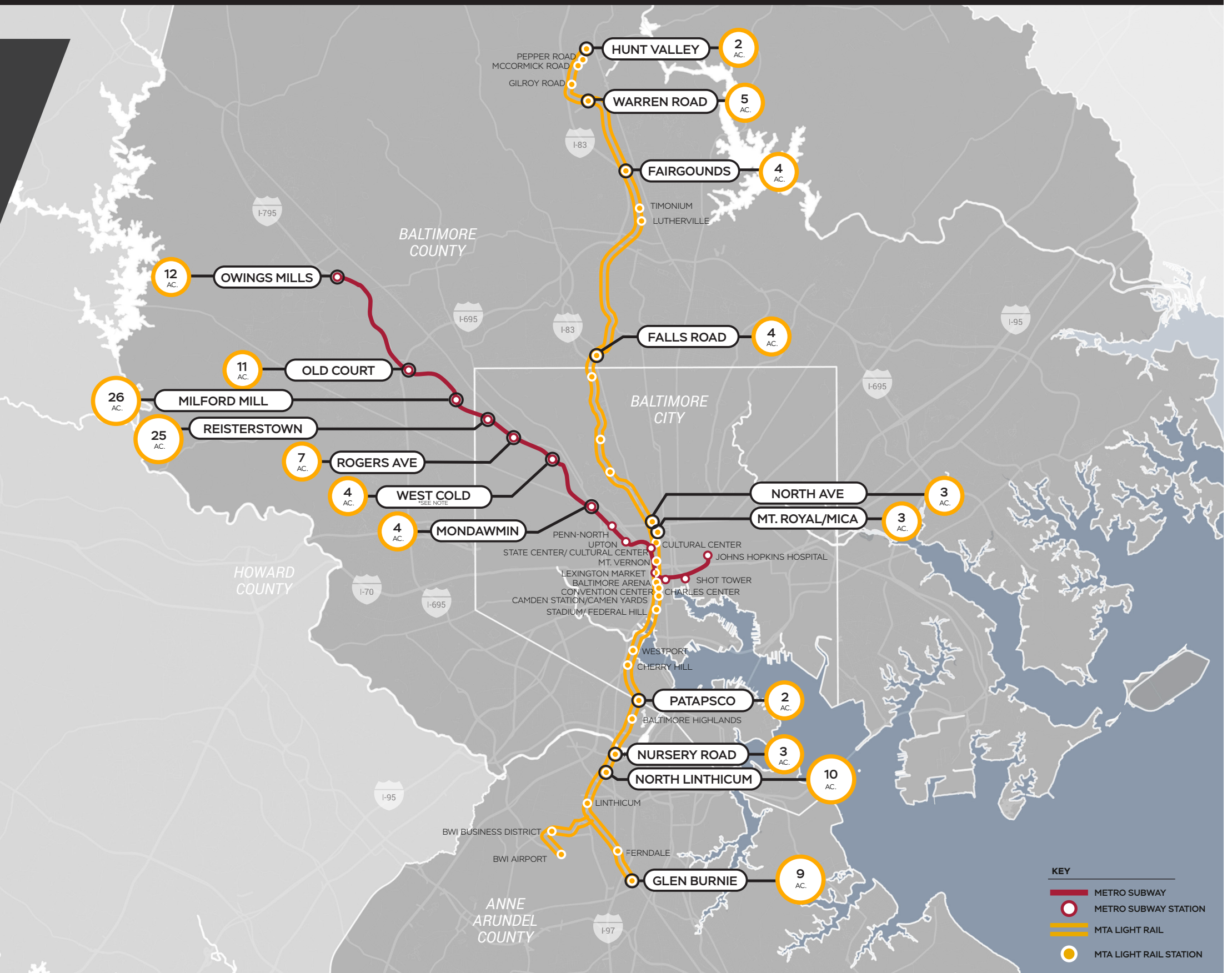
MDOT's analysis shows that, of the total land available for TOD, 134 acres of MDOT/MTA-owned land across 17 stations are suitable for joint development. This number accounts for parcels that are developable and excludes MDOT-MTA land that has other existing uses or site characteristics that are likely to prevent development. This MDOT/MTA land represents a substantial opportunity to deliver new housing, commercial space, and public amenities directly adjacent to transit stations.

LAND AVAILABLE FOR JOINT DEVELOPMENT (ACRES)

- 46** CITY OF BALTIMORE
- 66** BALTIMORE COUNTY
- 23** ANNE ARUNDEL COUNTY

- 134** TOTAL

*West Cold Spring Station developable area on this map includes parcels owned by Baltimore City and MDOT/MTA



KEY

- METRO SUBWAY
- METRO SUBWAY STATION
- MTA LIGHT RAIL
- MTA LIGHT RAIL STATION

Note: MDOT/MTA-owned land available for joint development is specific to land controlled by MDOT and MTA that is adjacent to stations and could potentially support joint development.

DEVELOPMENT CAPACITY

There is capacity to support 60 million square feet of new development across joint development and TOD opportunities in the Baltimore region. Bringing a larger share of regional growth to transit-accessible locations offers a direct path to supporting economic growth while also meeting goals for sustainability and equitable access by reducing dependency on cars and bringing more residents, workers, and visitors within walking distance of stations.

TOD supports regional housing goals by increasing housing supply and addressing the Baltimore region's need for new, quality housing. MDOT analysis indicates a need for more than 14,600 new multifamily units in the Baltimore region to meet housing market demand through 2033.

Joint development on MDOT/MTA-owned land alone can accommodate up to one third of multifamily housing demand during that time. Expanding to TOD, that housing need could be fully met many times over, with capacity for up to 50,000 housing units. Focused development around station areas could meet the region's housing needs for decades to come.

TOD will also foster a mix of uses in walkable station environments. TOD could yield an additional 2-3 million square feet of retail space and 5-6 million square feet of office space or institutional uses. Joint development could yield between 250,000 to 300,000 square feet of retail uses, and 400,00 to 500,000 square feet of office space or institutional uses.

Future TOD Build Out of All Station Area Parcels Identified with High TOD Opportunity

49 - 59M	New Square Feet of Development	5 - 6M
42,000 - 50,000	New Housing Units	4,000 - 5,000
2 - 3M	New Square Feet of Retail	250K - 300K
5 - 6M	New Square Feet of Office/ Institutional Uses	400 - 500K

Note: Totals included within "All TOD Sites" are inclusive of joint development potential. Data on joint development sites is also shown separately to specify the potential impact from development on MDOT/MTA-owned land.

Future Joint Development Build Out of MDOT/MTA-Owned Sites at 17 Stations

RIDERSHIP IMPACT

Increasing the scale and intensity of TOD will generate higher transit ridership across Baltimore's region, since locating residential, commercial, and institutional uses in proximity to transit stations improves access and convenience for potential riders.

Expanding TOD and joint development across Baltimore could generate an estimated \$6-7 million in additional annual fare revenue from TOD, with joint development contributing \$700,000-\$850,000 each year.

REGIONAL FISCAL IMPACT

As critical partners in advancing TOD, local governments are also the main beneficiaries in the fiscal revenue generated from projects. Joint development and TOD generate substantial long-term revenue through increased property, sales, and

income taxes on sites that currently either do not generate any taxes (in the case of MDOT/MTA-owned land) or are underutilized. Build out of the full TOD pipeline would generate up to \$7.0 billion in local tax revenues over 30 years.

Future TOD

Build Out of All Station Area
Parcels Identified with High TOD Opportunity

Future TOD		Future Joint Development		
Light Rail	Metro	Build Out of MDOT/MTA-Owned Sites at 17 Stations		
		Light rail	Metro	
+2.0M - 2.5M	+1.2 M - 1.5M	+87 - 105K	+260 - 317K	
\$4.0-\$4.8M	\$2.0-\$2.4M	\$0.2M	\$0.5-\$0.6M	
\$87-\$106M	\$43-\$53M	\$4 - \$5M	\$11 - \$14M	

Note: Totals included within "All TOD Sites" are inclusive of joint development potential. Data on joint development sites is also shown separately to specify the potential impact from development on MDOT/MTA-owned land.

Future TOD

Build Out of All Station Area
Parcels Identified with High TOD
Opportunity

Future TOD	Future Joint Development
Build Out of All Station Area Parcels Identified with High TOD Opportunity	Build Out of MDOT/MTA-Owned Sites at 17 Stations
\$6 - \$7B	\$600 - \$700M
\$5 - \$6B	\$500 - \$600M
15,400 - 18,700	1,300 - 1,600

Note: Fiscal impact figures represent the total tax revenue generated for local and state governments, inclusive of all associated property, personal income, and sales taxes. Permanent jobs represent employment generated and sustained by ongoing project operations. Estimates exclude any infrastructure investments or incentives that may be provided to support financial feasibility of development. Totals included within "All TOD Sites" are inclusive of joint development potential. Data on joint development sites is also shown separately to specify the potential impact from development on MDOT/MTA-owned land.



2

STATION EVALUATION

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OVERVIEW

To better understand how to most effectively advance TOD and joint development, what existing challenges must be overcome, and how to prioritize opportunities, MDOT conducted an evaluation of land across all stations. For TOD, the analysis included all applicable properties within a half mile of all 46 stations¹. For joint development, the analysis included the 17 stations where there is MDOT/MTA-owned land. The fundamental trigger towards achieving TOD and its benefits in any case is the alignment of land use planning and related zoning.

TOD Site Considerations:

(summary of all qualifying properties within a half mile of station)

- » Zoning
- » Market Readiness
- » Pedestrian Connectivity
- » Current Land Use

Joint Development Site Considerations:

(only MDOT/MTA-owned property adjacent to station)

- » Zoning
- » Market Readiness
- » Transportation Infrastructure Needs

For each analysis, MDOT developed a scoring framework to evaluate the type of opportunity present at each station for joint development and TOD. MDOT also compiled all criteria into an overall composite score. Stations were classified as A, B, or C, reflecting hurdles that must be overcome to realize new development.



Image of Odenton Station | Image Provided Courtesy of MDOT

¹The BWI Airport station is excluded from this station evaluation analysis since all property in the station area is occupied by airport uses and there is not opportunity for TOD.

Transit-Oriented Development

Joint Development

ZONING

Establishing zoning that enables meaningful density supports transit ridership and maximizes access to connectivity across the region. TOD-supportive zoning also lowers barriers for development and reduces pre-development costs, signaling a clear public commitment to TOD and joint development that encourages private sector investment. MDOT is prioritizing working with local jurisdictions to ensure zoning for appropriate height, density, and allowable uses are in place for any location where it focuses its TOD resources.

MARKET READINESS

Real estate market conditions—such as rental pricing, vacancy rates, market demand, and construction costs—often dictate whether a site will be able to attract private investment from developers and investors. While MDOT has limited influence over broader market dynamics, it can collaborate with local jurisdictions and other state and federal agencies to deploy tools and resources that address perceived market challenges.

CURRENT LAND USE

The existing use of a site significantly influences its potential for development or redevelopment. Vacant or underutilized sites offer the greatest near-term opportunity for TOD. Sites occupied by existing buildings that contribute to the fabric of their neighborhood are less of a focus for near-term TOD opportunity. Additionally, other land uses that are not a target for new private investment—such as community facilities, institutional buildings, parks, and single-family residential buildings—are excluded from MDOT's analysis.

PEDESTRIAN CONNECTIVITY

Increasing transit ridership through TOD requires a safe and comfortable connection between a TOD project and the station. Sites with adequate pedestrian infrastructure—such as continuous sidewalks, safe crossings, and direct station access—are better positioned to support walkable, mixed-use environments. Conversely, sites with limited pedestrian connectivity require targeted investments to improve connectivity, which influences both project feasibility and development timelines.

TRANSPORTATION INFRASTRUCTURE NEEDS

Joint development projects typically require replacement of existing transportation infrastructure—such as bus facilities, commuter parking, or pick up/drop off zones—as well as other site improvements that make a property ready for private development. The cost of these infrastructure improvements add to a total project cost and can challenge the financial feasibility of projects. MDOT developed preliminary estimates of anticipated infrastructure costs at each station as a first step in determining the impact to joint development. Any infrastructure costs must be offset by the value of private development.

TRANSIT-ORIENTED DEVELOPMENT

Stations in and around Downtown Baltimore consistently emerge as the best positioned today to support TOD given existing infrastructure, land use, and market conditions that are conducive for TOD. However, several station areas outside of Downtown also demonstrate potential and merit targeted investment to help build a more fully integrated network with active nodes throughout the system. The maps on the following pages detail each of the individual criteria assessed as part of this overall score—zoning, pedestrian connectivity, current land use and market readiness—highlighting the specific strengths and challenges of each station and the half-mile station area around it. These insights will help MDOT and local jurisdictions tailor their approach to advance TOD across Baltimore in a way that is responsive to each station’s specific context and needs.



Owings Mills Courtyard | Image provided courtesy of MDOT



Group A includes stations with the fewest development constraints and highest opportunity for near-term TOD investment.

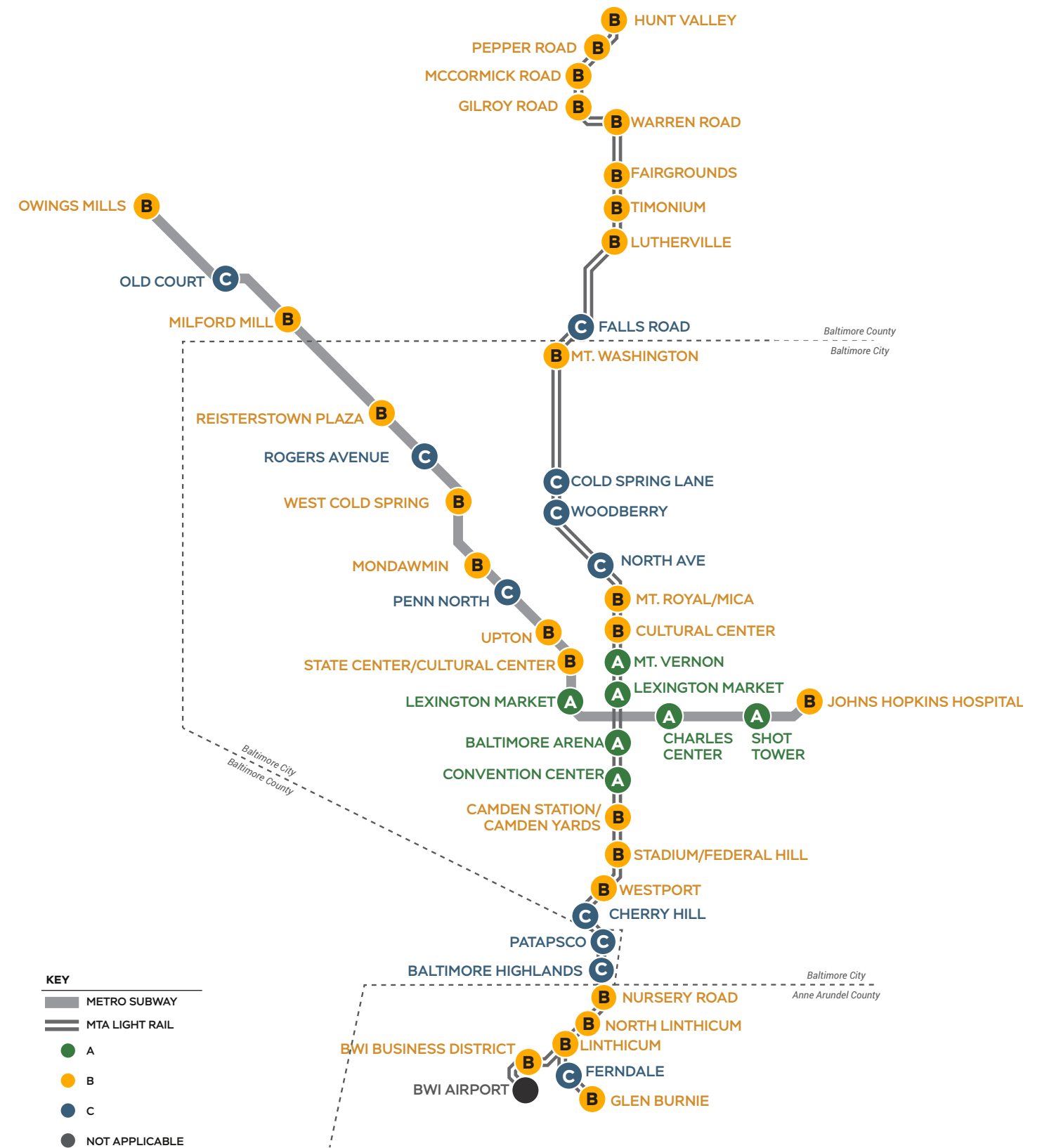


Group B includes stations with additional opportunity for TOD investment, though with some moderate barriers that must be addressed to best support TOD.



Group C identifies locations requiring additional action from MDOT and local jurisdictional partners to realize TOD, which may include zoning updates, enhancing pedestrian connectivity to stations, or strengthening the market opportunity.

STATION AREA OVERALL RATING | TOD²



²Overall station scores for TOD and joint development are not directly comparable: TOD scores reflect all qualifying properties within the half-mile station area. Joint development properties, which are shown beginning on page 34, are specific to the MDOT/MTA-owned property at each station.

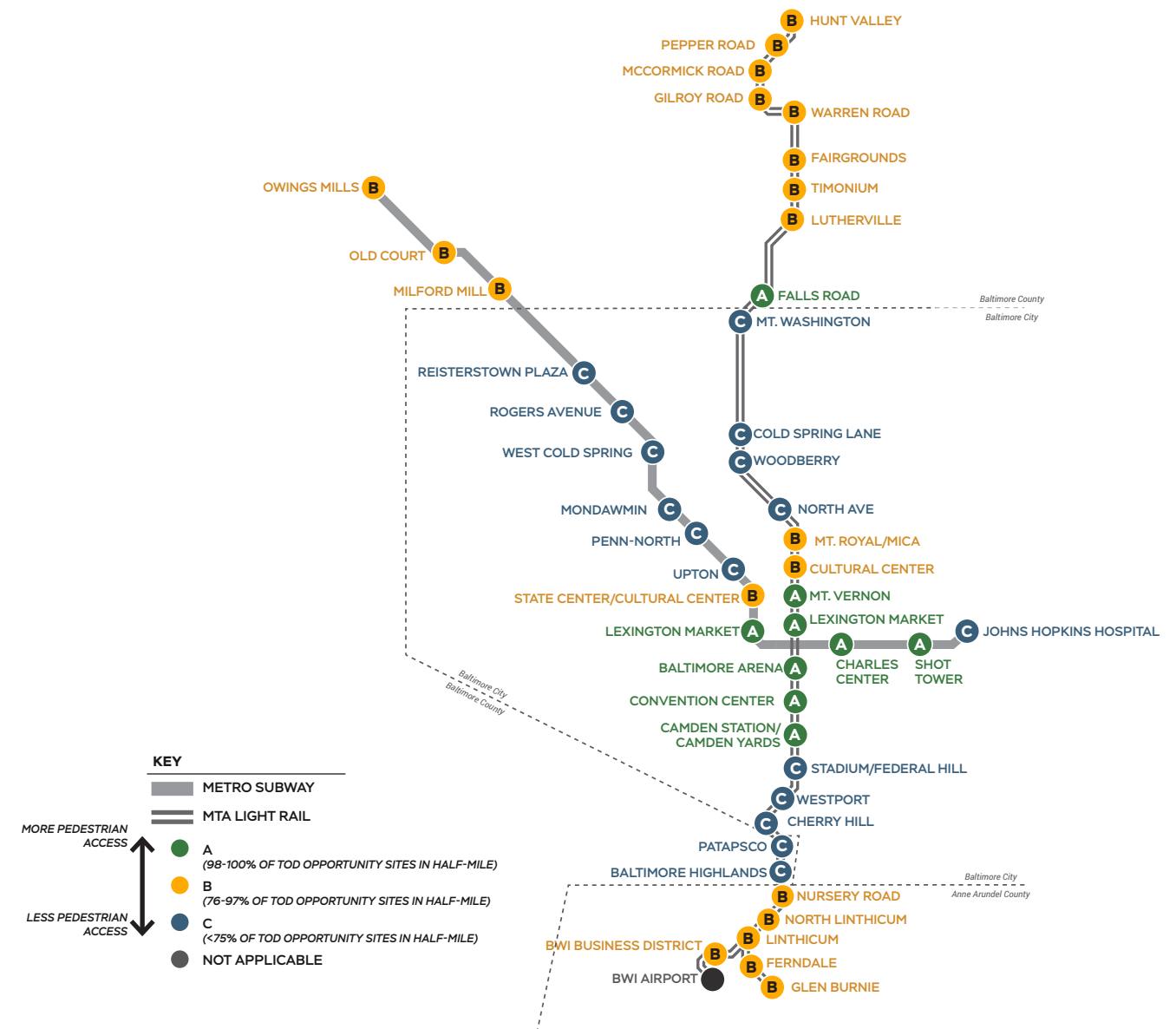
VACANT AND UNDERUTILIZED LAND | TOD



- » **Vacant sites**
There is no building on the site OR the building on site is marked as vacant by the jurisdiction
- » **Underutilized**
The assessed land value of the property is greater than 40% of the total property value

Additionally, sites currently in active use for community, religious, and institutional uses, as well as parks and single-family properties were excluded from MDOT's analysis, as these sites are generally not in a position for new development.

PEDESTRIAN CONNECTIVITY | TOD



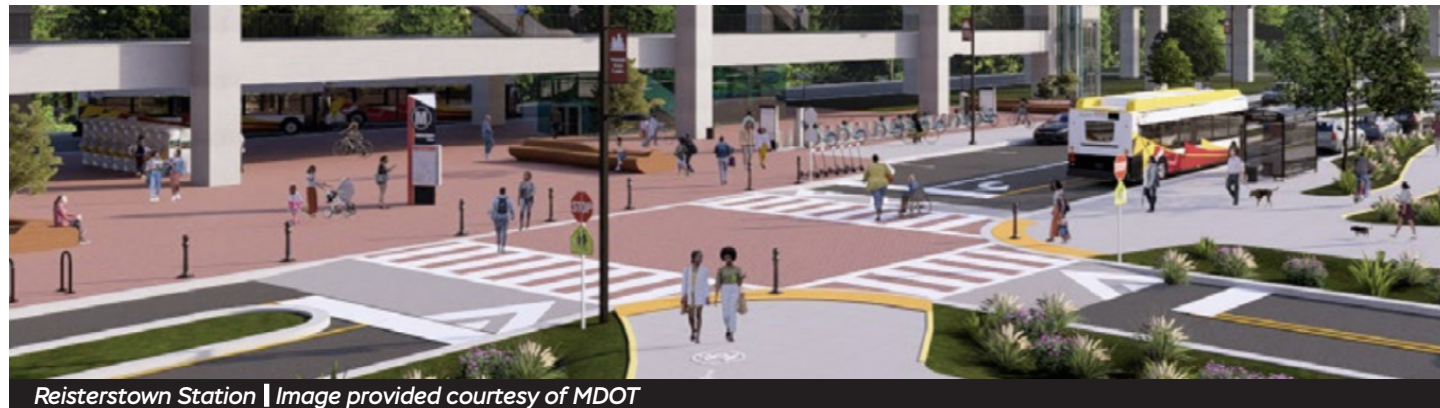
PEDESTRIAN CONNECTIVITY
Research shows that residents and workers within a half-mile of a transit station are significantly more likely to use transit regularly. As such, MDOT's analysis considered the half-mile walkshed, which is based on existing pedestrian and bicycle infrastructure such as sidewalks and crosswalks, in understanding how well station areas are positioned to support TOD. Stations with a higher share of surrounding properties within the walkshed scored higher. Stations with a lower share of surrounding properties scored lower and require infrastructure updates to more fully support transit connectivity in their station areas.



JOINT DEVELOPMENT

On property that it owns, MDOT is uniquely positioned to support TOD through high-quality joint development, as it has more control over initiating the development process. However, to successfully advance TOD, these sites still must have appropriate land use and zoning in place and development must also be financially feasible. **By advancing joint development, MDOT has the opportunity to catalyze additional TOD and "make the market" for quality development throughout the Baltimore region.**

This joint development analysis focuses specifically on the 17 stations where MDOT owns property adjacent to stations⁴. Like the station area evaluation, MDOT categorized MDOT/MTA-owned sites into three different types of opportunities: Group A, B and C. Because the sites are individual properties, MDOT's analysis could be more specific in evaluating the site-specific development opportunity based on zoning, market readiness, and transportation infrastructure needs.



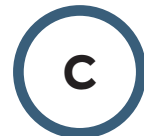
Reisterstown Station | Image provided courtesy of MDOT



MDOT/MTA-owned land in Group A represents pure market opportunities, as they are in a strong real estate market and sites are suitable for TOD. These sites are considered prime candidates for joint development. However, stations may not have supportive zoning in place, which is a prerequisite for MDOT focusing resources on advancing joint development.



MDOT/MTA-owned land in Group B represents catalytic opportunities, as the site is suitable for TOD and may have supportive zoning in place. However, real estate market conditions may limit private market investment interest. These stations are positioned to attract non-market driven opportunities, such as institutional uses or workforce housing, that establish community anchors and help to accelerate investment in additional TOD in the station area.



MDOT/MTA-owned land in Group C represents a site-constrained opportunity, as the site is likely challenging or less suitable for development due to specific site conditions such as size, location, environmental hazards, etc. These stations would require significant investment to acquire adjacent land or rectify identified site challenges in order to support joint development.

⁴For the purposes of this study, Penn Station and State Center were excluded from the joint development station evaluation analysis given separate planning efforts underway in those locations for supporting new transit-oriented development. State Center is excluded from the joint development station evaluation analysis given separate planning efforts underway. State Center is a former State employment facility owned by the Maryland Department of General Services (DGS) and is adjacent to the State Center Metro Station, Cultural Center Light Rail Station, and numerous CityLink bus routes. DGS, MDOT, and the State-City Working Group convened by Governor Moore are collaborating on a redevelopment for that site as a transit-oriented development. Under a 2024 study led by Baltimore City, a redeveloped State Center site could yield 1,500-1,600 housing units in addition to commercial uses and open space.

OVERALL RATING | JOINT DEVELOPMENT



- KEY**
- METRO SUBWAY
 - MTA LIGHT RAIL
 - A (PURE-MARKET OPPORTUNITIES)
 - B (CATALYTIC OPPORTUNITIES)
 - C (SITE CONSTRAINED OPPORTUNITIES)
 - NON-TOD CONDUCIVE ZONING
 - ZONING PERMITS MID-RISE DEVELOPMENT (4-7 STORIES)
 - ZONING PERMITS HIGH-RISE DEVELOPMENT (8+ STORIES)

As noted earlier in this section, overall station categorization for joint development and TOD are not directly comparable, as joint development analysis is focused specifically on the MDOT/MTA-owned land at each station, while the TOD analysis encompasses all qualifying properties within the half-mile station area.

MARKET READINESS | JOINT DEVELOPMENT



MARKET READINESS

Market conditions dictate the type of development uses and the building density that are financially feasible to construct. Due to rising construction costs and current financing markets, stations that support the higher cost of mid-rise development (4-7 stories), which is typically targeted as a minimum threshold for joint development, are only financially feasible without subsidy at a select number of stations. There are no stations where high-rise development of 8+ stories is currently feasible.

Market conditions are continually evolving and MDOT recognizes the need to evaluate changes over time that may impact the feasibility of supporting meaningful density at station sites. Additionally, local and state government actions can help bolster a market and catalyze investment where market conditions may not otherwise support it. For stations where mid-rise development is not currently feasible, real estate and economic development tools identified in the Tools to Support TOD section of this report provide resources to help achieve feasibility.

ZONING | JOINT DEVELOPMENT



ZONING

To align with the assessment of feasibility by building type used in the market readiness analysis, MDOT assessed existing zoning of joint development sites to determine ability to support high-rise (8+ stories) and mid-rise (4-7 stories) development. Despite the opportunity provided by proximity to transit, the land surrounding many stations is not zoned for

the height or density that support TOD. Since local jurisdictions have zoning control, including for MDOT/MTA-owned properties, they will need to update the zoning to TOD-supportive uses where it does not exist currently in order to fully realize the joint development opportunity across the system.

TRANSPORTATION INFRASTRUCTURE NEEDS

Investments in transportation infrastructure are needed to fully unlock development potential near key transit nodes. Replacement or consolidation of Park & Ride spaces into garages, redesign of pick up/drop off (PUDO) areas, and reconfiguration of bus bays are essential to preparing MDOT/MTA-owned sites to support higher-density, mixed-use projects that align with TOD goals.

When there is a need for transportation improvements on a site, MDOT typically uses the land value generated by joint development to support the cost of new infrastructure. However, in many instances, the cost of transportation infrastructure upgrades is greater than the land value of development.

When this occurs, MDOT works with local jurisdictions to identify local, state, and federal sources to help close the funding gap.

MDOT's initial estimate of transportation infrastructure costs at each site are preliminary based on a high-level understanding of needs at each station. The estimate includes costs to consolidate Park & Ride spaces, update pick up/drop off areas, and reconfigure bus facilities, but excludes any non-transportation site infrastructure (e.g., utilities, stormwater management) and any off-site traffic improvements. As individual sites are advanced for joint development and MDOT conducts station planning efforts, transportation infrastructure cost numbers will be refined.

INFRASTRUCTURE COST ESTIMATES | JOINT DEVELOPMENT

ANNE ARUNDEL COUNTY

Glen Burnie	\$10.4 M	A
North Linthicum	\$6.3 M	C
Nursery Road	\$1.8 M	C

BALTIMORE CITY

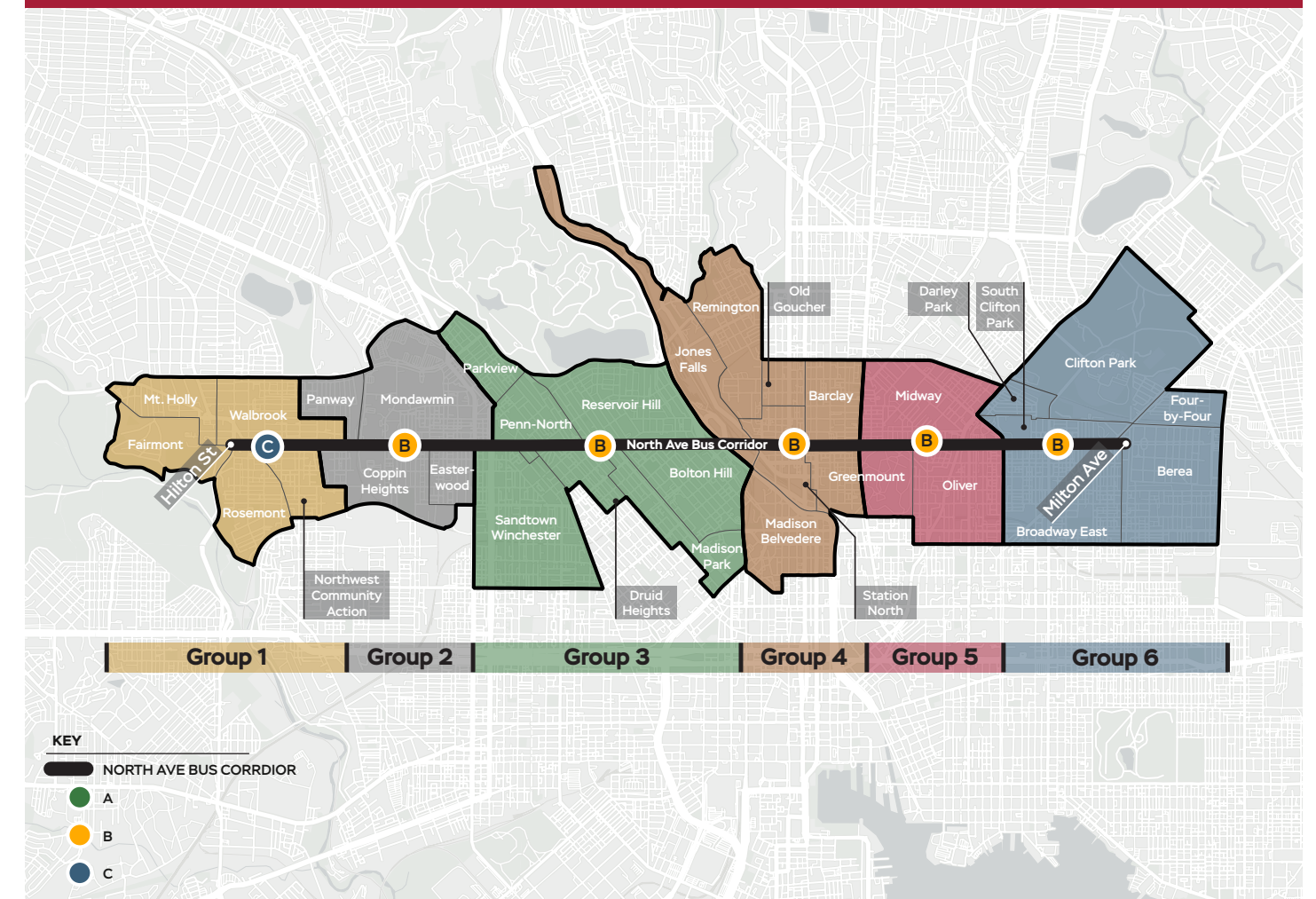
Mondawmin	\$12.6 M	B
Reisterstown Plaza	\$13.8 M	B
Rogers Avenue	\$11.5 M	B
West Cold Spring	\$11 M	B
Mt. Royal/MICA	\$0	C
North Avenue	\$2.4 M	C

BALTIMORE COUNTY

Milford Mill	\$37.9 M	A
Old Court	\$25.7 M	A
Timonium	\$19.4 M	A
Warren Road	\$2.8 M	A
Patapsco	\$6.3 M	B
Falls Road	\$7.5 M	C
Hunt Valley	\$2.4 M	C

GROUP A
GROUP B
GROUP C

NORTH AVENUE AS A CASE STUDY FOR BUS TOD



Like rail service, high-capacity bus service presents an opportunity to leverage transportation infrastructure investments to support TOD. North Avenue Rising was a \$27.3 million initiative led by MTA and Baltimore City to improve mobility and streetscape conditions along a 4.8-mile stretch of North Avenue in Baltimore.

Completed in June of 2022, the project delivered dedicated bus lanes, transit signal priority, upgraded stops, bike infrastructure, and pedestrian safety enhancements to support transit access and corridor revitalization.

To identify opportunities for TOD along North Avenue, and to establish a framing for considering TOD around high-capacity bus service more broadly in the Baltimore region, MDOT replicated the TOD analysis completed for Metro and Light Rail. MDOT analyzed each parcel in the corridor using four key criteria: current land use and level of utilization (e.g., vacant or underutilized parcels), existing zoning, pedestrian

connectivity, and market readiness. The results of this analysis were organized into six neighborhood groups. As other bus corridors in the region with similar invested and dedicated service emerge, MDOT will pursue similar analysis and action.

Key findings

- » Across the corridor, there are 138 acres of land that are well positioned to support new TOD development. Improvements to TOD-supportive conditions will increase the amount of land well positioned for TOD.
- » 90% of properties in the corridor are within a ½-mile walk of a bus stop, rail, or subway station—indicating strong transit connectivity.
- » The most significant barriers to development are market constraints and land availability. These challenges point to the need for targeted financial tools and strategic activation of vacant or underutilized parcels to unlock TOD potential along the corridor.



3

PORTFOLIO STRATEGIES

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Update Land Use and Planning to Support TOD
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Implement Tools to Address Financial Feasibility Barriers
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Forge Strategic Partnerships
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Increase Development Readiness of MDOT/MTA-Owned Sites

OVERVIEW

Supporting TOD and joint development across the Baltimore region will require swift, coordinated action among a diverse set of stakeholders. Each group plays a critical role: local jurisdictions hold the most powerful land use and financial tools to support development, while MDOT and other state and federal agencies—such as the Maryland Department of Commerce (Commerce) and the Maryland Department of Housing and Community Development (DHCD)—can enhance project feasibility through wraparound policies and incentives that help attract private investment.

Lead	Strategy	Action Item
Local Jurisdictions	1 Update Land Use and Planning to Support TOD	1.1 Develop priority stations and corridors for TOD
		1.2 Pursue Maryland TOD Designations
MDOT	2 Implement Tools to Overcome Financial Feasibility Barriers	2.1 Leverage local tools
		3 Forge Strategic Partnerships
	4 Increase Development Readiness of MDOT/MTA-Owned Sites	3.1 Support local jurisdiction's TOD efforts
		3.2 Strengthen state agency agreements
		3.2 Secure corporate and institutional partnerships
		4.1 Conduct TOD Site Strategy studies
4.2 Align infrastructure improvement efforts with MTA and SHA		
4.3 Prioritize sites with TOD-Supportive Zoning		
4.4 Accelerate joint development solicitation		
4.5 Pursue TOD funding in Capital Plan		

CASE STUDY REISTERSTOWN

MDOT, in partnership with MTA, Wabash Development Partners, Baltimore City and DHCD is planning more than 900,000 square feet of new development, including more than 850 housing units, across 26 acres of MDOT/MTA-owned land at the Reisterstown Plaza Metro Station. The project is representative of the renewed focus on TOD in the state and serves as a precedent for supporting housing opportunities and increasing density at stations across the region. Plans envision a dynamic, mixed-use community anchored by residential multifamily, senior housing, townhomes, and 53,000 square feet of ground floor

retail. The site will include a central park green space and improved pedestrian and bicycle access along Wabash Avenue. Funds for development planning are supported through a \$4.6 million transportation grant through the federal Better Utilizing Investments to Leverage Development (BUILD) grant program. Additionally, this development will require financial tool support from the City of Baltimore and State DHCD. Once completed, joint development at Reisterstown will generate more than \$11 million annually in new tax revenue for the City of Baltimore and increase transit ridership and revenue for MTA.



Image provided courtesy of MDOT

STRATEGY 1:

UPDATE LAND USE AND PLANNING TO SUPPORT TOD

TOD success depends on land use policies that support walkable development patterns and building types that maximize density and community benefits. To be most efficient, MDOT must focus its TOD resources on locations with appropriate zoning. Local jurisdictions control land use policy and will work in coordination with the State to ensure TOD-supportive environments.

1.1 | DEVELOP PRIORITY STATION AREAS AND CORRIDORS FOR TOD

Local jurisdictions will build on MDOT's existing research—summarized in this report and its appendices—in combination with their own planning goals to identify priority station areas and transit corridors for TOD. **To guide this process, local jurisdictions will develop station area plans, corridor plans, or other strategies that establish a coordinated planning framework for supporting TOD in their jurisdiction.**

These documents will include:

- » Coordinated rezoning and long-term land use to support TOD-appropriate densities and uses;
- » Identification of infrastructure investments to improve accessibility to stations, including pedestrian, bicycle, and first/last mile connections;
- » Anticipated character for different station area nodes (e.g., government center, educational campus, mixed-use residential and shopping) that builds on existing uses, anticipates variation in uses along the transit system, and signals investment interests to the private market; and
- » Implementation plan that includes financial tools to support financially viable development.

These plans will also integrate near-term opportunities and actions that support a long-term vision. This dual-track approach—prioritizing early wins while preparing long-term opportunities—enables more efficient resource allocation, clearer coordination across agencies, and a balanced TOD strategy that leverages current opportunities while laying the groundwork for future growth.

1.2 | PURSUE MARYLAND TOD DESIGNATIONS

Securing a Maryland TOD designation, which is coordinated through MDOT, serves as a signal of public commitment and unlocks access to state-level resources to accelerate planning, investment, and implementation. Designated TOD sites benefit from enhanced visibility, streamlined interagency coordination, and eligibility for targeted funding and technical assistance. Local jurisdictions will work closely with MDOT to pursue TOD designations for priority stations areas identified in Strategy 1.1. To maximize the impact of TOD designations, jurisdictions will ensure that applications are supported by a clear planning framework; completed rezonings supportive of TOD uses, where applicable; and commitments to infrastructure improvements that enhance connectivity to stations (e.g., sidewalks, bike lanes).

STRATEGY 2:

IMPLEMENT TOOLS TO ADDRESS FINANCIAL FEASIBILITY BARRIERS

While MDOT and local jurisdictions have limited direct control over conditions that dictate private development feasibility, they do possess tools for overcoming financial barriers to TOD. Local jurisdictions in particular have the strongest set of tools for attracting private investment.

2.1 | LEVERAGE LOCAL TOOLS

To support TOD, local jurisdictions will leverage and streamline the use of tools that address financial barriers for development. While there are a broad range of available tools and this report is not intended to be exhaustive, the below tools are of particular focus in the Baltimore region. The “Tools to Support TOD” section provides additional detail on each of the identified tools.

» Tax Increment Financing (TIF)

Local jurisdictions are responsible for establishing and managing TIF districts, which can be used to fund public infrastructure and utilities that support new development. Recognizing the benefit TIF provides when structured strategically in the right locations, such as for infill development near transit, local jurisdictions will establish a framework for considering TIF in support of TOD projects where the benefit case to the local jurisdiction is clear and documented.

» Tax Abatement / Payment in Lieu of Taxes (PILOT)

Local jurisdictions are responsible for negotiating and approving PILOT agreements, which are the primary structure used in Maryland to abate property taxes and support development. Local jurisdictions will evaluate their approach to development incentives and assess opportunities to prioritize financial incentives, to the extent they are made available, to favor development of multifamily residential, offices, and retail near transit.

» Public uses anchoring TOD sites

Local jurisdictions oversee the location of local public facilities such as government offices and libraries that can serve as an anchor for TOD and support a sense of place around stations. Local jurisdictions will establish economic development guidelines that prioritize the location of new public facilities near transit and coordinate with MDOT to locate as part of joint development projects, where appropriate. Additionally, MDOT will engage state agency partners on locating appropriate facilities accessible to transit.

» Opportunity Zones

States are responsible for nominating census tracts to be designated as Opportunity Zones. Local jurisdictions and MDOT will work together to engage state officials on aligning Opportunity Zone designations with qualifying TOD locations as part of the redesignation of eligible parcels in 2026.

» Enterprise Zones

Enterprise Zones are jointly administered by state and local jurisdictions. Enterprise zones should be used as a tool for TOD in supporting commercial and job generating uses near transit.

» MEDCO Strategic Infrastructure Loan Fund

MEDCO is the lead agency responsible for managing and deploying the Strategic Infrastructure Loan Fund. Local jurisdictions and MDOT play a key role in connecting developers to this resource and will coordinate with MEDCO to strengthen deployment of funds to eligible TOD sites.

STRATEGY 3:

FORGE STRATEGIC PARTNERSHIPS

Forging strategic partnerships is essential for advancing TOD and joint development. By aligning interests across shared goals, MDOT will channel increased resources to station areas while simultaneously supporting the goals of local jurisdictional partners, other state agencies, and institutional and investment partners.

3.1 | SUPPORT LOCAL JURISDICTION'S TOD EFFORTS

Strategies 1 and 2 in this report focus on actions local jurisdictional partners will take to support TOD. MDOT recognizes it must also be an active partner in coordinating and aligning efforts with state TOD resources and priorities. MDOT will work with local jurisdictions to support their TOD efforts by focusing its resources where they have the greatest impact.

» **TOD Capital Grant and Revolving Loan Fund**

The MDOT TOD Capital Grant and Revolving Loan Fund was established in 2023 to address points in the development process where financial gaps are most frequent. Local jurisdictions can access the fund to support design planning/site readiness and implement public infrastructure improvements. Local developers (non-profit or private) can also use the fund for loans providing gap financing for project construction. MDOT will coordinate with local jurisdictional partners and developers to deploy funding that advances local TOD initiatives.

3.2 | STRENGTHEN STATE AGENCY AGREEMENTS

In 2024, MDOT entered a Memorandum of Understanding with the Maryland Department of Housing and Community Development (DHCD) to better focus resources for affordable housing investment near transit. Building on this, MDOT will strengthen formal agreements with key state agencies by identifying shared priorities and aligning resources to focus on TOD locations.

» **DHCD**

MDOT and DHCD are focused on executing against their 2024 agreement and drive affordable housing investments with transit-oriented development to increase the production of a diverse supply of transit-accessible housing.

» **Department of Commerce (Commerce)**

MDOT will coordinate with Commerce to prioritize and support business attraction, job creation, and economic development near transit. Joint development efforts will focus on identifying sites with commercial potential and aligning incentives to attract private investment.

» **MEDCO**

MDOT will engage MEDCO to define a partnership framework that supports TOD financing through MEDCO's Strategic Infrastructure Revolving Loan Program and Fund, which unlocks flexible, low-cost financing for infrastructure and site readiness.

3.3 | SECURE INSTITUTIONAL AND CORPORATE PARTNERSHIPS

MDOT will proactively engage major employers, anchor institutions, and real estate stakeholders to build a coalition supporting TOD and investment near transit. These partnerships unlock co-investment in TOD locations, activate underutilized land, and align transit planning with workforce and innovation goals. Key actions include

- » **Identifying strategic partners**, which may include financial institutions, corporate campuses, hospitals, universities, and logistics hubs located near transit corridors.
- » **Developing a value proposition** that articulates shared interests and how TOD supports institutional goals—such as talent attraction, sustainability, community engagement, and connectivity.
- » **Leveraging funding and incentives** to align public programs, such as Opportunity Zones, with partnership investments.

As an initial step, MDOT will convene a working group of education and healthcare institutions (“Eds and Meds”) to align the planning efforts and space needs of these important Maryland employers with TOD opportunities. The education and healthcare sectors are rapidly growing, making up 30% of all job growth in Maryland between 2015 and 2025. Within Baltimore, as anchor institutions such as Johns Hopkins University, the University of Maryland, and others grow their footprint, transit adjacency of new facilities will support their mission by providing equitable access to students and employees while also supporting community development and economic development goals.

CASE STUDY

METRO CENTRE AT OWINGS MILLS

Owings Mills Metro Centre is one of the Baltimore region's most significant examples of transit-oriented development, transforming a former park-and-ride commuter parking lot into a dynamic mixed-use hub. Realizing the project required close coordination between Baltimore County, MEDCO, MDOT and a range of other stakeholders. MEDCO issued \$32.3 million in TIF-backed bonds to fund foundational improvements such as a multi-level parking garage, upgraded utilities, and new roadways. By retaining ownership of the garage and leveraging future property tax revenues to repay the bonds, MEDCO created a mechanism that allowed the County to avoid direct debt obligations while still enabling large-scale development. Baltimore County adopted TOD-friendly zoning to permit higher-density, mixed-use development and invested in civic anchors like a public library and a community college campus.

The project demonstrates how coordinated partnership that combines innovative financing, supportive zoning, and strategic public investment can deliver transformative TOD projects.



Image provided courtesy of MDOT/ Design Collective

STRATEGY 4:

INCREASE DEVELOPMENT READINESS OF MDOT/MTA-OWNED SITES

MDOT/MTA-owned sites near transit are one of MDOT's most powerful levers to catalyze TOD through joint development. Increasing their development readiness will position MDOT to attract private investment, deliver public benefits, and strengthen active, walkable environments around stations.

4.1 | CONDUCT TOD SITE STRATEGY STUDIES

MDOT will lead targeted planning efforts for MDOT/MTA-owned property to ensure a viable development opportunity, identify potential risks prior to engaging a development partner, and position sites for joint development. This TOD Site Strategy work includes affirming permitted zoning, determining transportation infrastructure replacement needs, developing site development concepts, and assessing financial feasibility. Where appropriate, MDOT will also evaluate TOD opportunities within the broader half-mile station area to assess TOD potential and ability of MDOT/MTA-owned sites to catalyze additional TOD investment on nearby properties. In addition to advancing joint development, these efforts will support local planning efforts and visioning for transit corridors.

4.2 | ALIGN INFRASTRUCTURE IMPROVEMENT EFFORTS WITH MTA AND SHA

Coordinated infrastructure investment is essential to creating station environments that support joint development and fully unlock development opportunities. MDOT will work closely with MTA and SHA to synchronize capital projects, identify shared funding opportunities, determine transit and traffic infrastructure improvements prior to solicitation, and ensure infrastructure supports walkability and safety.

4.3 | PRIORITIZE SITES WITH TOD-SUPPORTIVE ZONING

Sites with TOD-supportive zoning reflect previous policy actions taken by local jurisdictions to encourage TOD. These sites face fewer regulatory barriers to development and move more quickly through the development planning process. While MDOT does not have zoning authority over MDOT/MTA-owned land, its near-term focus for advancing joint development will prioritize sites that are already zoned by the local jurisdiction for TOD-supportive uses. This will ensure that public resources are directed toward locations with the most potential impact.

4.4 | ACCELERATE JOINT DEVELOPMENT SOLICITATIONS

Increasing the pace and scale of joint development activity will support more active and walkable station environments and, as an anchor of new investment, will help catalyze further development activity around stations. MDOT will build on its ongoing joint development efforts at Reisterstown, Odenton, and Bowie State to accelerate joint development solicitations and executing Master Development Agreements with private developers in the Baltimore region.

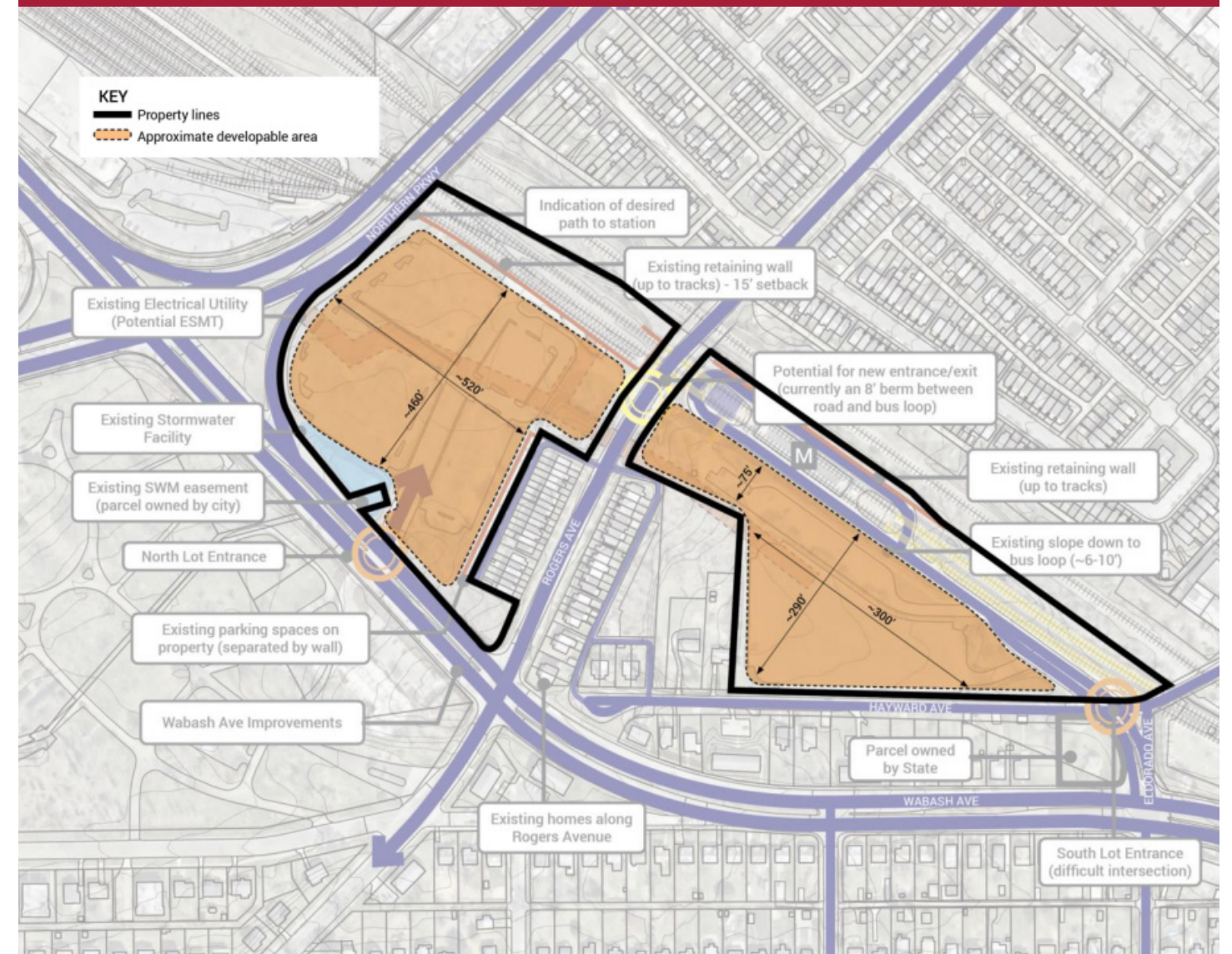
4.5 | PURSUE TOD FUNDING IN CAPITAL PLAN

Supporting TOD in MDOT's Capital Plan underscores the state's commitment to joint development. MDOT will pursue TOD funding in its Capital Plan to support the execution of strategies in this report and implementation of joint development. In particular, as there are joint development sites with TOD-supportive zoning that have identified transportation infrastructure needs, MDOT will seek infrastructure funding to advance development at those sites.

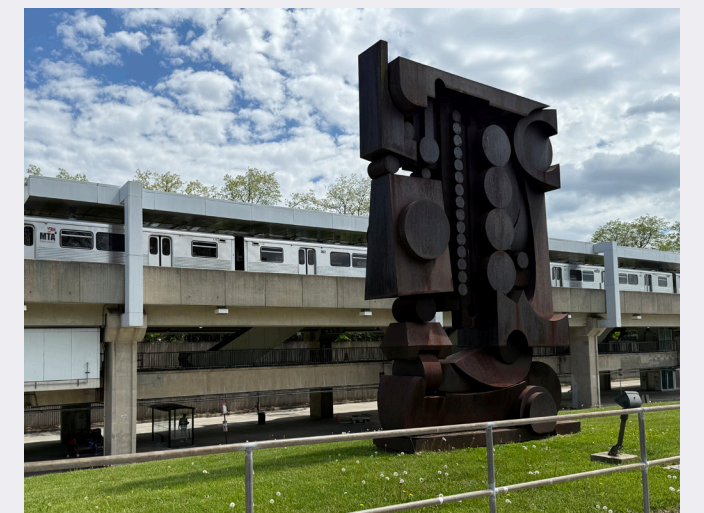
4.6 | CONTRIBUTE LAND VALUE TO SUPPORT FINANCIAL FEASIBILITY OF JOINT DEVELOPMENT

For joint development projects, which occur on MDOT/MTA-owned land, MDOT is open to leveraging its land value to achieve the goals, objectives, and principles of the joint development project or to offset the costs of transit infrastructure improvements, as needed, on a case-by-case basis.

CASE STUDY ROGERS AVENUE



MDOT is leading a station area planning study for the Rogers Avenue Metro Station for advancing joint development in Northwest Baltimore. MDOT owns approximately seven acres, which is divided by North Rogers Avenue. A conceptual site plan, developed for illustrative purposes, identified the ability to maintain bus capacity and consolidate Park & Ride spaces into a garage that would allow for development of four buildings totaling more than 700 residential units. Additionally, joint development would support site infrastructure upgrades and improved pedestrian connectivity between the station and the surrounding area. The study positions Rogers Avenue as a catalytic site for transit-integrated housing development in Baltimore that offers housing at a range of price points.



Images provided courtesy of MDOT



4

**STATION ACTION
PLANS FOR JOINT
DEVELOPMENT**

Overview

OVERVIEW

MDOT and its state agency and local jurisdictional partners are committed to advancing specific actions to support joint development during the next three years. The following tables are action plans for joint development property organized by the station where it is located. The highest-priority opportunities are station sites with TOD-supportive zoning. The remainder of station sites are organized by their station evaluation grouping.

MDOT recognizes that conditions will continue to evolve that may impact the identified action plans for each property or the prioritization of properties. For example, if a site is rezoned for TOD-supportive uses, that would impact its prioritization and defined actions. MDOT will continually evaluate these action plans and update them, as needed. Updates will be included in future joint development progress reports from MDOT.

This report focuses on station-specific action plans for joint development sites since MDOT has a higher degree of control in initiating development there.

CASE STUDY ODENTON



MDOT, in partnership with Anne Arundel County and the Maryland Economic Development Corporation, is spearheading a \$270 million redevelopment of the Odenton MARC Station along the MARC Penn Line. The plan will transform 13 acres of underutilized MDOT/MTA-owned land into a vibrant, mixed-use district featuring more than 900 residential units, retail space, and enhanced pedestrian and bike infrastructure. The project aims to strengthen multimodal connectivity and support regional growth, particularly given Odenton's proximity to Fort Meade. The project is made possible by the construction of

a Park & Ride garage by Anne Arundel County that supports transportation infrastructure needs at the station while providing space for development of new housing. MDOT released a development solicitation in December 2024 to seek proposals from potential private development partners, with the goal of selecting a partner and entering into a development agreement in 2026. As one of the largest TOD investments in Maryland, the initiative reflects the state's commitment to leveraging transit assets for housing production and economic development.

Image provided courtesy of MDOT

PRIORITY OPPORTUNITIES

Sites that have TOD-Supportive Zoning in Place

Station	Action Plans (2026-2028)	Lead
Owings Mills	1) Advance refinement of the North Campus Development Plan due to changes in market conditions.	Developer and MDOT
	2) Advance remaining South Campus development opportunities.	Developer and MDOT
	3) Advance construction.	Developer
Reisterstown	1) Execute Master Development Agreement.	Developer and MDOT
	2) Advance project entitlements and approvals.	Developer and MDOT
	3) Advance Phase I construction.	Developer
Rogers Avenue	1) Issue joint development solicitation and select development partner for the North Parcel	MDOT
	2) Address funding needs for configuration of transportation facilities, including commuter garage on the South Parcel	Baltimore City and MDOT
	3) Advance design of the Development Plan and execute Master Development Agreement for the North Parcel	MDOT and Developer
	4) Secure financial resources to close financial feasibility gap for development of housing.	Maryland DHCD and Developer
	5) Advance project entitlements and approvals	Developer and Baltimore City
Glen Burnie	1) Conduct TOD Site Strategy for the MDOT/MTA-owned land.	MDOT
	2) Coordinate with MTA on the Light Rail Modernization Program. Confirm finalized plans for new maintenance facility and alignment with joint development opportunity.	MTA and MDOT
	3) Secure funding for changes to transportation infrastructure.	Anne Arundel County and MDOT
	4) Issue joint development solicitation and select development partner, subject to feasibility.	MDOT
West Cold Spring	1) Coordinate with Baltimore City to align planning coordination on MTA and City-owned properties.	Baltimore City and MDOT
	2) Conduct TOD Site Strategy, in collaboration with the City, to include MDOT/MTA-owned land and adjacent City-owned land.	Baltimore City and MDOT
Mondawmin	1) Complete ongoing MTA study on enhancing accessibility to the shopping center and bus transit plaza.	MTA
	2) Work with current or future site developers to ensure any shopping center redevelopment enhances transit connections and accessibility.	MDOT
	3) Conduct a TOD Site Strategy for the MDOT/MTA-owned land.	MDOT

GROUP A
Pure Market Opportunities

Station	Action Plans (2026-2028)	Lead
Fairgrounds	1) Rezone site to allow for TOD-supportive uses.	Baltimore County
	2) Update the Small Area Plan for Area 7 to include planning and economic development strategy supportive to joint development and TOD.	Baltimore County
	3) Conduct TOD Site Strategy to determine feasibility.	MDOT
Milford Mill	1) Rezone site to allow for TOD-supportive uses.	Baltimore County
	2) Update the Small Area Plans for Area 3 and Area 4 to include alignment of planning and economic development strategy supportive to joint development and TOD.	Baltimore County
	3) Conduct TOD Site Strategy to determine feasibility.	MDOT
	4) Enhance infrastructure connectivity to east side of the station.	MDOT
Old Court Metro	1) Rezone site to allow for TOD-supportive uses.	Baltimore County
	2) Update the Small Area Plan for Area 4 to include planning and economic development strategy supportive to joint development and TOD.	Baltimore County
	3) Conduct TOD Site Strategy to determine feasibility.	MDOT
Warren Road	1) Rezone site to allow for TOD-supportive uses.	Baltimore County
	2) Update the Small Area Plan for Area 7 to include planning and economic development strategy supportive to joint development and TOD.	Baltimore County
	3) Conduct TOD Site Strategy to determine feasibility.	MDOT

Note: Other "Near-Term Opportunities" stations with TOD-supportive zoning are included above in the "High-Priority Opportunities" table.

GROUP B
Catalytic Opportunities

Station	Action Plans (2026-2028)	Lead
Patapsco	1) Rezone site to allow for TOD-supportive uses.	Baltimore County
	2) Conduct initial market sounding to determine development viability.	MTA and MDOT

Note: Other "Non-Market-Driven Opportunities" stations with TOD-supportive zoning are included above in the "High-Priority Opportunities" table.

GROUP C
Site-Constrained Opportunities

Station	Action Plans (2026-2028)	Lead
Falls Road	1) Rezone site to allow for TOD-supportive uses.	Baltimore County
	2) Assess technical barriers (e.g. site conditions, vehicular access, environmental conditions, etc.) to determine long-term viability for supporting joint development.	MDOT
Hunt Valley	1) Complete ongoing MTA study on enhancing accessibility to the shopping center and bus transit plaza.	Baltimore County
Mt. Royal / MICA	1) Rezone site to allow for TOD-supportive uses (site is currently partially zoned for TOD-supportive uses).	Baltimore City
North Avenue	1) Rezone site to allow for TOD-supportive uses.	Baltimore City
North Linthicum	1) Rezone site to allow for TOD-supportive uses.	MDOT
	2) Conduct TOD Site Strategy to determine feasibility.	MDOT
Nursery Road	1) Rezone site to allow for TOD-supportive uses.	Anne Arundel County



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TOOLS TO SUPPORT TOD

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OVERVIEW

Realizing TOD opportunities requires more than vision—it requires the right set of tools to unlock development. To advance the strategies outlined in this report, MDOT and local jurisdictions will need targeted tools that directly address the land use constraints and financial challenges identified across station areas. These tools, as identified in Strategy 2.1 of this report, draw from best practices across the region and the country, and serve to reduce development risk, enhance project feasibility, and position sites to attract sustained private investment.

While this toolkit does not encompass all available resources for supporting TOD, it reflects MDOT’s initial focus on tools that directly address the land use and financial barriers most commonly impeding project advancement and with the most potential impact for the Baltimore region. The goal is to accelerate TOD and joint development activity by targeting the foundational challenges that matter most.

- ZONING**
- TAX ABATEMENT/ PILOT**
- TAX INCREMENT FINANCING**
- OPPORTUNITY ZONES**
- ENTERPRISE ZONES**
- PUBLIC USES ANCHORING TOD SITES**
- MEDCO STRATEGIC INFRASTRUCTURE LOAN FUND**

ZONING



Zoning is one of the most powerful tools for enabling TOD. Updating land use regulations, including comprehensive plans, to allow higher-density, mixed-use development near transit stations signals a public commitment to compact, transit-supportive growth. It also reduces pre-development costs by minimizing uncertainty in the entitlement process, making it easier for developers to move projects forward. However, zoning alone is not enough—market demand, infrastructure readiness, and access to financing must also be in place to realize development outcomes.

MDOT’s focus and efforts will prioritize sites that are already zoned for TOD-supportive uses, ensuring that public resources are directed toward locations with fewer regulatory barriers and greater readiness for development.

Benefits

- » Provides market signal for TOD goals
- » Reduces the need for future rezoning variance requests, saving time and money.
- » Reduces pre-development risk for developers

Potential Challenges

- » Rezoning alone does not guarantee development if market demand or financing is lacking
- » May face political or community resistance depending on location and scale
- » Requires coordination across agencies and jurisdictions to be effective

IMPLEMENTATION LEAD

Local jurisdictions are responsible for zoning and land use. For MDOT/MTA-owned sites adjacent to stations that are not currently zoned for TOD, local jurisdictions and MDOT will coordinate to update land use plans and zoning. For broader station areas, local jurisdictions will, as part of planning updates and the development of small area plans, advance implementation of TOD supportive zoning where appropriate.

ZONING CASE STUDY ST. PAUL GREEN LINE

Minneapolis-St. Paul, Minnesota

Metro Transit’s Green Line opened in 2014 to run between the central business districts of Minneapolis and St. Paul. To better connect the large investment in new infrastructure to economic development goals and land use, the City of St. Paul put in place Traditional Neighborhood (TN) zoning—a proactive move that reduced parking minimums, allowed buildings up to 75 feet, and established a minimum Floor Area Ratio (FAR) of 1.0 for development within a ¼-mile of stations. In aligning land use policy with transit investment, the City unlocked value in underused parcels and helped catalyze projects like the 171-unit Carton Place and the 220-unit Moda at Raymond, which introduced new housing options.



Image provided courtesy of MDOT

TAX ABATEMENT



Tax abatements in Maryland are primarily implemented through Payment in Lieu of Taxes (PILOT) agreements. These agreements allow local jurisdictions to reduce or eliminate property taxes for qualifying development projects for a period of time. By lowering the tax burden, PILOTs are a valuable tool to support TOD project feasibility and attract private investment.

PILOT agreements can be tailored to support developments that deliver specific public benefits such as affordable housing, transit-supportive density, or infrastructure improvements. When used effectively, they also help signal public commitment to TOD. However, long-term abatements may delay fiscal returns to local jurisdictions, requiring careful structuring to ensure short-term incentives do not outweigh long-term revenue goals.

Benefits

- » Helps attract private investment to areas targeted for TOD
- » Encourages faster project delivery by improving financial feasibility
- » Can be aligned with local planning goals to support strategic development

Potential Challenges

- » Long-term abatements may delay fiscal returns to local jurisdictions
- » Requires careful structuring to ensure public benefit and fiscal balance
- » May not have public support if perceived as overly generous to developers or of limited benefit to the surrounding community

IMPLEMENTATION LEAD

Local jurisdictions are responsible for negotiating and approving PILOT agreements, which are the primary structure used in Maryland to abate property taxes. Local jurisdictions will evaluate their approach to development incentives and assess opportunities to prioritize financial incentives, to the extent they are made available, to favor development of multifamily residential, offices, and retail near transit.

TAX ABATEMENT CASE STUDY

MORE HOUSING AT METRORAIL STATIONS ACT

Montgomery County, MD

In 2020, Montgomery County faced a challenge in its goal to maximize housing production near transit. While zoning at Metro stations supported high-density development, most planned projects were for lower density buildings because the higher cost of high-rise construction was not financially feasible. In response, the County enacted the **More Housing at Metro Act** to promote greater housing density near transit. The policy provides a 15-year property tax abatement for residential developments on Metro-owned land that exceed eight stories. The first project completed under the policy was Fivesquares Development's Strathmore Square, a 10-story, 220-unit residential building completed in 2024 at the Grosvenor-Strathmore Metro Station.



Image provided courtesy of MDOT

TAX INCREMENT FINANCING



Tax Increment Financing (TIF) is a flexible financial tool that allows jurisdictions to capture the future increase in property tax revenue generated by new development and invest it into the infrastructure and public improvements required to support that project. TIFs are used to fund critical improvements near transit stations, including transportation infrastructure, utility extensions, streetscape upgrades, and public amenities. By reinvesting future tax revenues into the project area, jurisdictions reduce upfront costs and move projects forward more quickly.

TIFs are highly effective when structured appropriately, namely for infill revitalization projects, and they have been successful across the country. However, they must be closely evaluated to ensure the future value generated will support current costs. TIFs carry more risk when used to support projects less likely to impact the value of existing properties, such as with greenfield development or projects disconnected from the urban boundary.

In Maryland, legislation passed in 2009 expanded the use of TIFs to support both capital costs and operations and maintenance (O&M) for TOD-related infrastructure. In select jurisdictions including Baltimore County and Anne Arundel County, alternative local taxes aside from property tax may also be collected to support TIF districts. While there is no local sales tax in Maryland, there are other taxes available to support TIFs.

Successful examples of past TIFs to support TOD in Maryland include projects at the Owings Mills, Savage, and Odenton stations. In each case, the funding generated through TIF enabled implementation and success of development near the station for projects that would not have occurred otherwise.

Benefits

- » Reduces upfront infrastructure costs and improves project feasibility
- » Maryland expanded TIF bonding capacity for TOD and provided flexibility near stations
- » Funding can be used for both capital and O&M costs for TOD-related infrastructure

Potential Challenges

- » Requires strong tax base growth to generate sufficient increment
- » Complex to structure, requiring financial and legal expertise
- » No local sales tax in Maryland, limiting alternative revenue source

IMPLEMENTATION LEAD

Local jurisdictions are responsible for establishing and managing TIF districts. Recognizing the benefit TIF provides when structured strategically in the right locations, such as for infill development near transit, local jurisdictions will establish a framework for considering TIF in support of TOD projects where the financial benefit to the local jurisdiction is clear and documented.

OPPORTUNITY ZONES



Opportunity Zones offer federal tax incentives designed to attract private investment to underserved areas. They unlock private capital for TOD projects by offering deferrals and reductions on capital gains taxes for investments made in designated areas. When applied strategically, Opportunity Zones support TOD by channeling capital into transit-adjacent neighborhoods. In 2026, states will have the opportunity to redesignate qualifying census tracts, a key opportunity to prioritize transit corridors and station areas for Opportunity Zone status.

Benefits

- » Funds can be used for a wide range of projects, including housing, retail, and infrastructure
- » When aligned with transit access and local planning, Opportunity Zones can move the needle on TOD feasibility

Potential Challenges

- » Navigating Opportunity Zone regulations and timelines can be challenging

IMPLEMENTATION LEAD

States, through their Governor, are responsible for nominating census tracts to be designated as Opportunity Zones. Local jurisdictions, MDOT, and DHCD will work together to engage state officials on aligning Opportunity Zone designations with qualifying TOD locations as part of the redesignation of eligible parcels in 2026.

PUBLIC USES ANCHORING TOD SITES



Public uses—such as civic spaces, libraries, cultural centers, and government facilities—play a catalytic role in anchoring Transit-Oriented Development (TOD). These uses enhance accessibility, activate station areas, generate foot traffic, and provide community-serving amenities that help define the character of a place. When strategically located near transit, public uses reduce perceived development risk, can attract additional private investment, and contribute to a cohesive, mixed-use environment.

Benefits

- » Serve as an economic development tools for public investments already planned to occur
- » Supports placemaking and creating destinations
- » Public investment reduces perceived development risk

Potential Challenges

- » High upfront costs for jurisdictions
- » Public uses alone may not guarantee private investment or sustained economic activity

IMPLEMENTATION LEAD

Local jurisdictions will establish economic development guidelines prioritizing the location of new public facilities near transit and coordinate with MDOT to locate as part of joint development projects, where appropriate. Additionally, MDOT will engage state agencies on locating appropriate state facilities accessible to transit.

ENTERPRISE ZONES



Maryland's Enterprise Zone program provides real property and income tax credits to businesses that invest and create jobs in designated economically distressed areas. These incentives reduce operating costs for businesses, improve development feasibility, and stimulate economic activity in underserved communities. When these zones are aligned with transit routes Enterprise Zone incentives support transit-accessible investment in commercial uses.

Benefits

- » Can be layered on with other tools and programs
- » Flexible and locally administered

Potential Challenges

- » Limited to designated areas
- » Enterprise Zones might not be sufficient to support TOD in distressed areas
- » Administratively complex

IMPLEMENTATION LEAD

Enterprise Zones are jointly administered by state and local jurisdictions. Local jurisdictions and the State should align Enterprise Zones to support commercial and job generating uses at TOD sites in the region.

MEDCO STRATEGIC INFRASTRUCTURE LOAN FUND



The **Strategic Infrastructure Loan Fund**, administered by MEDCO, provides flexible, low-interest loans to private developers to reduce financial barriers for development. While not exclusive to TOD sites, transit proximity is one criterion for meeting eligibility (alternatively, projects can qualify by being located in a Maryland Sustainable Community or Priority Funding Area). Eligible fund uses include property acquisition, design and development, and infrastructure construction. These funds are particularly beneficial for early-stage costs that can be difficult to finance through traditional sources. However, the fund is currently limited in scale—at \$10 million—and access is competitive. As the fund is more fully capitalized, its strategic deployment will further local and state TOD priorities.

Benefits

- » Offers low-interest, flexible loans
- » Covers key pre-development costs
- » Reduces risk for private developers

Potential Challenges

- » Needs to be more fully capitalized to increase impact; current funds are committed
- » Access is competitive and selective

IMPLEMENTATION LEAD

MEDCO is the lead agency responsible for managing and deploying the Strategic Infrastructure Loan Fund. However, local jurisdictions and MDOT play a key role in connecting developers to this resource and will coordinate with MEDCO to strengthen deployment of funds to eligible TOD sites.



**Baltimore Region Transit-Oriented
Development Strategy | 2026**

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