

# SITE SELECTION

January 2019



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tape for relocating companies has attracted a growing manufacturing and logistics base. Take this snapshot of West Henderson, where Fortune 5000 companies capitalize on the area's many competitive advantages.

### West Henderson Locations

- 1 Development Opportunity**  
Industry: Commercial, Office, Industrial  
Acres: 116
- 2 Development Opportunity**  
Industry: Commercial, Office, Industrial  
Acres: 21
- 3 Future Development - Matter Park**  
Industry: Commercial, Office, Industrial  
Acres: 38.3
- 4 Costco Anchored Retail Center**  
Industry: Retail  
Acres: 67.6
- 5 Raiders Practice Facility & Headquarters**  
Industry: Global Headquarters & Finance  
Acres: 55.5  
\$75 Million Capital Investment  
250 New Jobs
- 6 Turano Banking Company**  
Industry: Advanced Manufacturing & Logistics  
Acres: 32.9  
\$48 Million Capital Investment  
150 New Jobs
- 7 Future Development - Bruner Industrial Park**  
Industry: Commercial, Industrial  
Acres: 4.6
- 8 Future Development - Odyssey Industrial Park**  
Industry: Industrial, Flex  
Acres: 5
- 9 Airparc South**  
Industry: Industrial, Flex  
Acres: 13
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Industry: Mixed-Use, Residential, Retail, Entertainment  
Acres: 97
- 11 South 15 Airport Industrial Park**  
Industry: Industrial  
Acres: 8.4
- 12 Roberts Communication**  
Industry: Office, Warehouse, Broadcasting  
Acres: 10.2
- 13 Levi's Strauss & Co**  
Industry: Distribution  
Recently added 150 new jobs
- 14 Smiths Distribution Center**  
Industry: Distribution  
\$13.5 Million Capital Investment  
270 Full Time Jobs
- 15 FedEx Ground**  
Industry: Distribution
- 16 Development Opportunity**  
Industry: Commercial, Office, Industrial  
Acres: 279

#### Manufacturing Jobs

**24,679**

Up 31.4% since 2010, compared to 8.4% nationwide

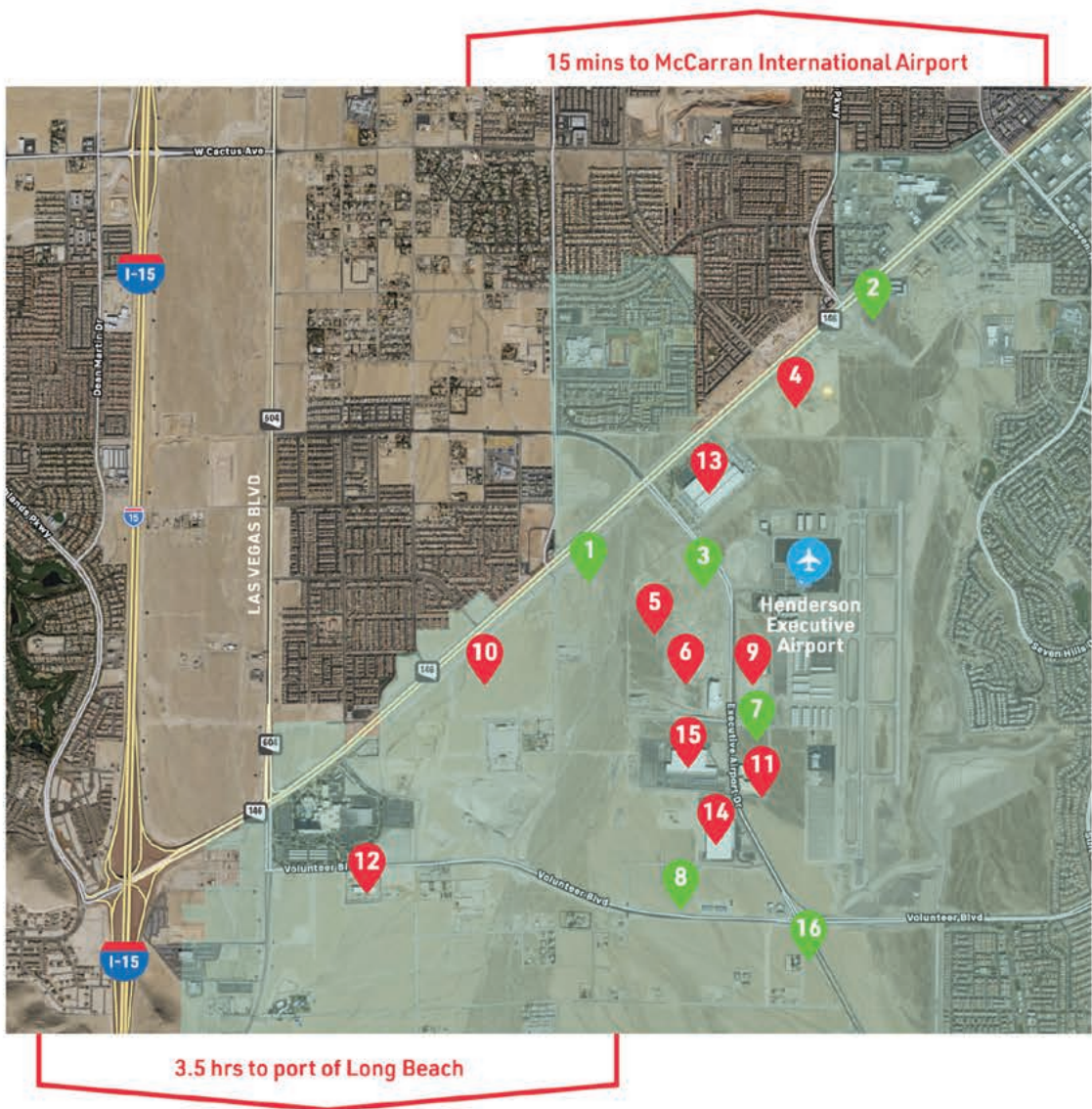
#### Logistics & Operations Jobs

**50,979**

Up 32.5% since 2010, compared to 14.6% nationwide







## West Henderson

In addition to welcoming the future Raiders' corporate headquarters and training facility, West Henderson is home to companies such as the Levi Strauss & Co. fulfillment center, FedEx Ground, Roberts Communications, Turano Baking Company, Smith's Food & Drug Distribution Center and a variety of others covering more than 1.5 million square feet of space centered around Henderson Executive Airport.

With more than 600 acres of land for employment uses in West Henderson, this area is a highly-coveted industrial

location conveniently situated minutes away from McCarran International Airport and on the I-15 corridor with the southernmost access in the valley, boasting an eight-hour turnaround time to Los Angeles ports and customers.

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Cover design Sean Scantland

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# Happy New Year to You, and Happy Birthday to Us



**W**e figured our 65th anniversary was a good time to celebrate the people who make this publication possible. You know what I look like, but now's your chance to meet the other editors, the designers, sales and other staff who work tirelessly to keep Site Selection and its parent company, Conway Inc., the most authoritative and dynamic publishing concern in the economic development field. Conway President Adam Jones-Kelley's overview of the last six-plus decades, and a look back at some past Site Selection covers – the winners and the really bad ones – will round out the nostalgic trip unique to this first issue of 2019.

You'll find familiar January issue content, too – our regional workforce development rankings and annual State of the States section with recent legislative activity and the latest demographic and economic data available for each state, for example.

Oh, there's coverage of HQ2 as well. Lots of it. But you would expect that from a magazine called Site Selection. And you'd expect the kind of reporting and analysis of it that only Site Selection delivers.

To be honest, the topic was getting old. It's not unlike the wall-to-wall coverage of Y2K in the late 1990s, when the world's computers were going to grind to a halt at the stroke of midnight on January 1, 2000. Remember? Y2K. HQ2. These codewords seem to require a "2."

But rather than the end of HQ2 coverage, it's really the beginning. The New York City and Crystal City/Northern Virginia areas are in for quite a ride in the months and years ahead. So is Nashville, the winner of a key operations center and beneficiary of 5,000 new jobs in the coming years. That's covered extensively in this issue, too.

Instead of endless speculation about which of the 20 finalist metros would get the nod, which metros suddenly found bajillions of public dollars with which to craft incentive proposals and the merits or motives behind so public a city search, now there's new material to plumb: How will the already-very-built-up Crystal and Long Island Cities – and their transit systems – accommodate the tens of thousands of new workers coming to town, for example? Ramifications of the split HQ2 decision are not even known yet. Positive or negative, we look forward to sorting them out in these pages so that future investors in projects large and small, and the areas hoping to host them, are wiser for it.

We plan to keep doing that for at least 65 more years.

Till next time,

Mark Arend, Editor in Chief



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**Cornerstone Streamlines Member-to-Member Information Sharing**

In this letter I'd like to highlight robust information sharing and research resources available to IAMC members.

In 2009, a member with a large U.S.-based chemicals company suggested IAMC create a process for quickly communicating with the Corporate Active members about urgent, late-breaking corporate real estate (CRE) business issues. The member modeled the idea after a method her company used to quickly brief hundreds of middle managers about important news. The company called these sessions "flash calls," and IAMC adopted the same name for conference calls dedicated to getting fast answers to Corporate Active members' questions.

Most professional associations support their members by providing technical, management and market information. But early in IAMC's existence it was not obvious to its leaders how to approach this challenge. After all, the commercial real estate industry already published tons of data. But soon it became clear what the Corporate Actives needed was trusted advice and input from fellow CRE professionals. Often, they did not know whom to ask and who could be trusted. So, IAMC's leaders set out a code of conduct emphasizing ethical standards and behavior. Over time, the Corporate Active membership has become a community whose members share information with a high degree of confidence.

Flash Calls were IAMC's first foray to help the Corporate Actives work better by sharing advice, ideas and methods. The next iteration in this process was a service we call IAMC Special Information Requests. These dispensed with the conference call that characterized the Flash Calls. IAMC staff emailed the questions to the Corporate Actives, tallied responses and forwarded

these to the question originators along with the names of the respondents. This worked well, and demand for the service quickly expanded.

Next, to simplify the process and reduce the time required to deliver responses, IAMC invested to enhance its online member-to-member service. The new capability, called Cornerstone, is an online digital discussion board that enables all members to seek information and provide their own input to others' questions. The service is flexible, allowing a question poster to define the member group to which the question will go.

Today, when members have specialized questions, we can offer them three tools: Flash Calls, Special Information Requests and Cornerstone. But Cornerstone gets the most use because it's easy to use and the responses come fast. To access it, go to IAMC's website and click the button at the top.

And let's not forget another way we share information: IAMC's official publication Site Selection magazine, which has reached a notable milestone with this 65th anniversary issue. Congratulations to Site Selection on its impressive service to its market and longevity. The publication's relationship with IAMC began in 2002, the year the organization was founded. The alliance has created positive value for both IAMC and Site Selection.

Lastly, the Santa Barbara Forum is coming up May 4-8. Register now if you have not already done so. We'll provide strong CRE professional development workshops and top-notch speakers, notably including Steve Forbes. I know you'll enjoy the city and its surroundings. To register, go to [www.iamc.org](http://www.iamc.org).



**Charles Waltz**

Best regards,  
**Charles Waltz**  
Chair, IAMC Board of Directors



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# Corporate Real Estate Implications of Common Supply Chain Models

*Editor's Note: This article is excerpted from the Sept. 16, 2018, Philadelphia Professional Forum Business Impacts Interest Group session. The program was presented by Blaine Kelley, Senior Vice President, Advisory & Transaction Services, CBRE, and Richard Lawless, Director, Georgia Pacific Co.*

## Context

Blaine Kelley provided a high-level overview of the supply chain and discussed how supply chain decisions affect real estate decisions. Richard Lawless reviewed Georgia Pacific's different businesses and provided an overview of the supply chain for each business. Interest Group participants shared their observations about the intersection between supply chain and real estate, and offered observations about supply chain trends impacting real estate.

## Key Takeaways

***Common supply chain models are “make to stock” and “make to order.”***

The Council of Supply Chain Management Professionals (CSCMP) defines the common supply chain models as the Efficient Supply Chain and the Responsive Supply Chain.



Philadelphia Professional Forum Business Impacts Interest Group session

- **Efficient Supply Chain.** CBRE thinks of the efficient supply chain as one that “makes to stock.” This is the traditional supply chain model used by most industrial companies. In this model, products are made and sent through a distribution channel. Areas of focus are costs and network efficiency.
- **Responsive Supply Chain.** These are supply chains for products that are “made to order.” They tend to be highly sophisticated, agile,

**“Supply chain strategy defines the connection and combination of activities and functions throughout the value chain in order to fulfill the business value proposal to customers in a marketplace.”**

— Blaine Kelley, citing Michael Porter of Harvard Business School

flexible, and adept at customizing products. Boeing airplanes and Dell computers are made to order. In today's e-commerce world, the general trend is toward more make-to-order supply chains where products are made and/or customized close to the customer.

Among the Interest Group participants, most have make-to-stock supply chains, but every company's supply chain is unique. Some have hybrids that combine make-to-stock and make-to-order. The general trend is that companies are moving closer to make-to-order, but doing so is hard and requires investment.

***Every supply chain must balance cost and service.***

In creating and operating their supply chain, companies face a tradeoff between cost and service. A low-cost position comes with lower service, and a high-service position means incurring higher costs. Companies must pick where on the parabola they want to be. (Many companies want to be high service and low cost, which is often not possible.)

While the real estate group focuses a great deal on rent, in many industries rent is a small percentage of total supply chain costs. Other factors such as labor, transportation and inventory are more significant.





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Important questions to ask are:

- What is the company's strategy for the future?
- What type of supply chain model is needed to support the future strategy?
- Where is the company today on the parabola, and where does the company want to go?

The answers to these questions will affect the real estate strategy.



A Business Impacts Interest Group participant

***Georgia Pacific has different supply chains for its different businesses.***

Georgia Pacific's business units and their supply chains are briefly described below:

- **Building products.** Products include plywood, lumber, gypsum products, and chemicals. Most of these are made to stock. The company produces products in plants and immediately puts them on trucks or rail, with few warehouses.
- **Consumer products.** This includes products such as paper plates, paper towels, bath tissue and various institutional paper goods. These are made to stock, and after they are produced are stored in 10 to 12 large distribution centers across the country. These products are stored close to customers, and the company keeps inventory on hand to provide high levels of service.
- **Packaging and cellulose.** This includes packaging materials such as corrugated boxes as well as bleached board, which is often customized for customers with printed information and is a made-to-order supply chain. The customized products are produced in advance, are transported to a warehouse close to the customer, and are stored until needed by the customer.
- **Harmon Recycling.** This business unit, which was acquired by GP, brings in waste paper, recycles it and acts as a broker. The company has labor-intensive facilities that take in paper, sort it, clean it, and ship it to end customers.

**Group Discussion**

The program participants offered comments on supply chain trends and the implications for real estate.

- **E-commerce is disrupting everything.** Companies in many industries — particularly retail — want to be closer to the customer and want to be able to customize products at the last minute. The growth of e-commerce businesses, especially Amazon, is increasing demand for warehouse space across the country.

- **Companies with labor-intensive operations are looking into automation.** Several companies have labor challenges that include finding enough labor to staff distribution centers, retaining employees and getting consistent performance. Automation can help address these issues. Corporate end users don't see distribution centers going from 100 to zero employees, but could see them going from 100 to 50, supported by robotics and automation.
- **Have logistics determine location.** One participant felt strongly that too often companies first make a location decision and then deal with logistical decisions. He suggested first doing a logistics analysis and using that analysis to drive location decisions. By using a logistics analysis, a company can draw a large circle on a map where a site can be located. Then other factors can be considered to determine the exact site.
- **Companies are thinking hard about lease versus own.** Because capital costs are so low and because leasing is often a long-term commitment of 10 or 20 years, many companies are thinking seriously about owning. However, even with a low cost of capital there is still internal competition for capital, and owning distribution centers is not seen as an attractive use of capital. As one participant said, "No one wants to buy a warehouse."
- **Tariffs caused the C-level to tap the brakes.** Tariffs were extremely disruptive for many companies because they created uncertainty and delayed major decisions.
- **The desire to be close to the customer is causing companies to bring some manufacturing back to the United States.** Some companies (particularly apparel companies) have had supply chains that involved sending raw materials to Asia, because the labor costs there were so low. Production would occur in Asia and the finished goods would be shipped back to the United States. But due to an increased desire for last-minute modifications, some production has been shifted back to the U.S. because the previous supply chain was taking too long.





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by ADAM BRUNS  
adam.bruns@siteselection.com

**T**he Industrial Technical Learning Center (InTech) at Chaffey College in Fontana, California, is the kind of place where individual dreams and company goals can both be realized. Launched in 2014 with a \$14.9-million TAACCCT [Trade Adjustment Assistance Community College and Career Training] grant, and with backing from companies and the region's 12 community colleges, the center is blazing new trails.

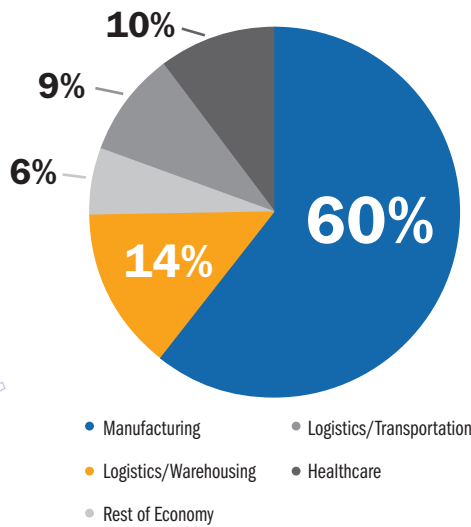
"The InTech partnership between California Steel and Chaffey College is an exemplary Apprenticeship model that aligns academic

learning with hands-on, practical on-the-job learning," says Gino DiCaro, vice president of communications for the California Manufacturers & Technology Association. "Employers and community colleges up and down the state can learn from this highly successful apprenticeship program."

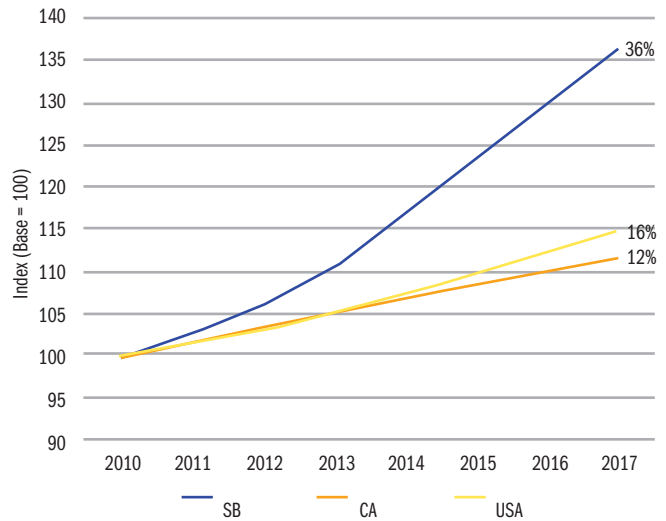
They can, and they should.

"The U.S manufacturing sector is advancing rapidly, and the pathways to developing and acquiring talent must change to keep pace," DiCaro says. "Secondary education must reflect current employment needs by offering a wider

### San Bernardino County Job Clusters



### Combined Growth of San Bernardino County Primary Clusters 2010-2017



variety of training options for career choices, including apprenticeships that take the place of typical school programs for technical-style work.”

Across-the-board buy-in is taking place in San Bernardino County in Southern California — with full support from the California Apprenticeship Initiative. The training option derives from innovation and necessity, considering the expected jobs growth. If the Inland Empire were a state, it would be the 40th largest by area and the 26th largest by population. Moreover, it’s a region projected to add 157,860 jobs between 2017 to 2022 — a 10-percent jump.

A number of colleges and high schools in

“This collaborative effort combines resources and engages our regional business community to develop a workforce tailored to the needs of the county’s economy.”

The Inland Empire/Desert Regional Consortium Strong Workforce Program Regional Plan draft, expected to be finalized in January 2019, identifies six target sectors offering the most promise for opportunity in coming years: advanced manufacturing; advanced transportation and logistics; energy, construction and utilities; health; ICT and digital media; and business and entrepreneurship.

“While the concept of an apprentice has



**If I were a company trying to get a foothold in California, even with low unemployment, there is a great talent pool out here.”**

— Rod Hoover, Human Resources Manager, California Steel Industries, Inc., on the quality of the workforce in San Bernardino County

San Bernardino County are working through a system-wide agreement that will offer apprenticeship pathways in every local area and industry sector.

“An apprenticeship is a highly effective way for a business to get new talent into their company, teach applicable skills and techniques and further develop their existing employees,” says Stephanie Murillo, administrative supervisor, San Bernardino County Workforce Development Board, which runs three Americas Jobs Centers.

been around for some time, it is a model used historically by the building trades and military,” Murillo says. “Now it’s back in vogue as more companies, educators, policy makers and non-profit groups come together to reduce the skills deficit.

#### Expertise Begins With Listening

Rod Hoover’s known the power of apprentices for some time. The human resources manager for California Steel Industries, Inc. (CSI) has worked



at the location in Fontana since it was Kaiser Steel back in the early 1980s, and will retire next year. “We’re one of the largest non-union steel manufacturing facilities in the country,” he says, “and part of my function is to keep it staffed with qualified people.”

His work championing apprenticeship and certifications will be part of his legacy to CSI and to the region.

“We have developed over 120 craft people since 1999, and we have 30 in training right now,” he says, noting that CSI’s capability to turn out a journey-level industrial maintenance specialist, electrician or mechanic in two years instead of the usual apprentice track of four to five years can save a company up to \$150,000. One big reason for that efficiency? The program — now certified by the state — is skills-based, not time-based. CSI is front and center in championing the program, but accounts for just a small portion of the 1,700

enthusiastic. Nestle Waters is incorporating the industrial mechanic apprenticeship into its long-term sustainability plan for its San Bernardino County facility. General Atomics Aeronautical System’s (GA-ASI’s) Field Avionics Department in Adelanto has been working with the State of California Department of Apprenticeship Standards (DAS), Victor Valley College (VVC), and the Victor Valley College Foundation to create the GA-ASI Electronics Technician Apprenticeship program.

The primary goal of the program is to produce 60 Field Avionics Technicians a year to accommodate General Atomics’ business needs. The program will consist of 480 hours of classroom training and 3,040 hours of On-the-Job (OJT) training. Classroom training will be delivered via contract education through VVC in the form of five for-credit classes. GA-ASI is currently in the process of securing a facility at the



## Apprenticeship is back in vogue as more companies, educators, policy makers and non-profit groups come together to reduce the skills deficit.”

— Stephanie Murillo, Administrative Supervisor, San Bernardino County Workforce Development Board

apprentices in the county who have graduated.

“Companies find apprentices learn quickly,” says Norco College Apprenticeship Director Charles Henkels. “In turn we can learn and respond more quickly to what industry needs because when someone’s an apprentice, they’re also a student in the community college providing us more feedback.”

“We’re dialed in to the voice of the business,” says Sandra Sisco, director, economic development, for the TAACCCT Grant & InTech Learning Center at Chaffey College, noting the importance of two registered apprentice occupations in particular: industrial maintenance electrical technician and industrial maintenance mechanic. It’s not just manufacturers who need them.

“Hospitals and logistics operations need those two occupations because they both have industrial equipment,” she says. “That’s where the shortage in the workforce is, not just in California, but around the world. So we feel very blessed to be able to create this pipeline of skilled workers.”

The response from employers has been

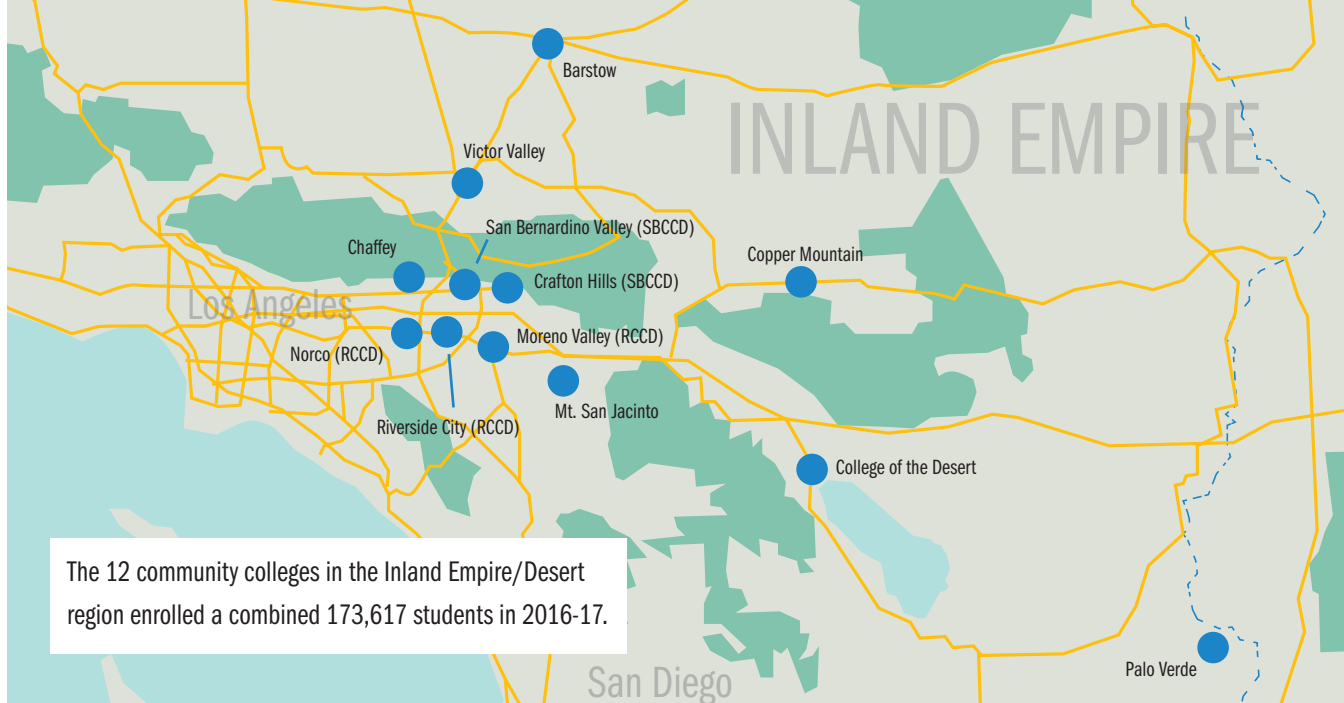
Southern California Logistics Airport (SCLA) in Victorville for these classes through a partnership with the San Bernardino County Workforce Development Board (WDB) and Stirling Development. OJT training will take place between the facility at SCLA and GA-ASI’s Flight Operations Facilities in the high desert. A Pre-Apprenticeship program is also being assembled for individuals who are not initially selected but have demonstrated the potential for success in the program.

Hoover says a recent meeting featured around 25 more manufacturers wanting to get on board. They’re part of a manufacturing cluster in the region that numbered around 4,500 firms a few years ago. They employed 90,000 then, but that number has now grown to 120,000.

### Grow Your Own

CSI employs around 1,000 at its operation, with about 15 active apprentices at any given time.

“If I were a company trying to get a foothold in California, even with low unemployment, there is a great talent pool out here,” Hoover



The 12 community colleges in the Inland Empire/Desert region enrolled a combined 173,617 students in 2016-17.

says. Typically, around 80 apply for the slots at CSI, coming out of training programs or by word of mouth.

The talent base is good for those growing warehouse operators too, even as automation grows. If a job is displaced by technology, “then the money is in the maintenance of that equipment,” Hoover says. “Those are good-paying jobs, in demand well into the future.” Norco College, the host college for the National Center for Supply Chain Automation, has created a national template for a registered apprenticeship program.

How good is the ultimate pay? At CSI, with shift differentials, overtime and profit sharing, electricians can make between \$90,000 and \$100,000 “easily,” and mechanics anywhere from \$80,000 up to \$95,000, before benefits, says Hoover. That level of pay still goes a long way in a region with a cost of living around 60 percent that of Los Angeles.

### Creating Career Pathways

Training through apprenticeships is just one aspect of the county’s commitment to support development of a strong workforce.

Career pathway programs, designed to help students and young adults throughout San Bernardino County prepare for opportunities in growth industries, will receive a boost under an innovative new effort.

The San Bernardino County Career Pathways Compact is a framework for a formal pathways network that helps youth attain the knowledge, skills and experience required for productive, sustainable careers. Among the goals of the Compact is assuring that graduating high school

students are able to enter their career field, gain acceptance into college or a vocational program, or become a registered apprentice. Participating students are co-enrolled in community college and earn college credits when they graduate.

This compact, which started with the San Bernardino Unified School District, San Bernardino Community College District and the WDB, will be scaled up to all 33 school districts across the county and its community colleges, serving upwards of 30,000 high school students each year.

“Many of these students are being exposed to career opportunities they never imagined possible, and in the process are receiving hands-on training and certification they can use to obtain employment. It’s a win for them and for businesses,” says Murillo.

Career pathways are a pillar of WDB’s GenerationGo!, a work-based learning initiative. Recently, 14 students from San Bernardino’s Cajon High School completed 120 hours of clinical practice in a GenerationGo! pilot program with Arrowhead Regional Medical Center, learning about a variety of career opportunities while being further propelled along a valuable career path.

With the buy-in of companies, institutions, students, parents and area leaders, these programs, along with the focus on re-engaging apprenticeship training, are making the county’s talent pool deeper.

For companies looking to do business in San Bernardino County, these programs underscore the county’s commitment to collaborate with every business sector to provide for skilled talent now and into the future. ▼

This Investment Profile was prepared under the auspices of San Bernardino County government. Employers interested in San Bernardino County Workforce Development Board programs may call (800) 451-JOBS or visit [www.sbcounty.gov/workforce](http://www.sbcounty.gov/workforce). For more information, contact the county Economic Development Agency at 909-387-4700. On the web, go to [www.sbcountyadvantage.com](http://www.sbcountyadvantage.com).





# INTERNATIONAL FDI SUMMIT

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## Mobility Solutions for the

# MASSSES



## Multiple projects show why Asia is a key growth location for Bombardier's rail systems business.

**B**ombardier Transportation announced in October that Bangkok Mass Transit System Public Co. Ltd. (BTSC) had signed a \$287-million contract earlier in the year for 20 years of maintenance services for the company's INNOVIA monorail 300 systems scheduled to be put in place on Thailand's first two monorail lines: the Bangkok pink and yellow lines.

"We are very pleased to continue our over-a-decade-long partnership with BTSC and to continue to contribute to Bangkok's urban development," said Gregory Enjalbert, managing director Thailand for Bombardier Transportation. The project, however, was just one among many pieces of Bombardier business in the Asia Pacific that simultaneously boost company growth while also boosting regional "smart city" economic development.

Since 1997, Bombardier Transportation (a Berlin-based business unit of the Quebec company) has expanded its Bangkok team to over

620 engineers and employees, "providing full life-cycle rail system support for customers across Asia Pacific," says the company. In December, as the leader in a consortium, Bombardier delivered the turnkey wayside rail system that is operating on the latest extension to Bangkok's rapid transit Skytrain. The new 13-km. (8-mile) Bearing-Samut Prakam section of the Sukhumvit Line is expected to enable up to 100,000 more journeys on the Skytrain, which regularly carries over

750,000 passengers per day. "It is exciting to witness the opening of a new rail link that is extending

connectivity to new parts of the Thai capital and will significantly improve the travel experience for commuters," said Enjalbert when the line was inaugurated by Thailand Prime Minister Prayut Chan-o-cha at a special event also attended by Canadian Ambassador to Thailand Donica Pottie.

by ADAM BRUNS

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### Singapore Service, Malaysian Talent

In November, Bombardier Transportation

Bombardier Transportation's INNOVIA monorail.

Photo courtesy of Bombardier



and ST Engineering's Land Systems arm announced a new strategic partnership to build a Singapore Service Center that will combine their respective strengths in transportation design; manufacturing; engineering knowledge; and maintenance, repair and overhaul (MRO) expertise to drive cost-effective localized component repair capabilities for customers in Singapore, as well as regionally.

Over the past 20 years, Bombardier has delivered 276 driverless MOVIA metro cars for Singapore's Downtown Line and 13 INNOVIA APM 100 automated people mover cars for the Bukit Panjang Light Rail Transit (LRT) system. Earlier this year, a new asset replacement contract was awarded to supply 19 new INNOVIA APM 300 cars, to retrofit 13 existing APM 100 cars, as well as to deliver a signaling system upgrade for 13 stops on the Bukit Panjang LRT Line.

A new \$607-million contract was awarded in July 2018 to supply 396 MOVIA metro cars for the high-capacity North-South (NSL) and East-West (EWL) Mass Rapid Transit (MRT)

past four years, we believe these initiatives will drive productivity, increase performance and improve competitiveness — ultimately raising rail industry performance regionally as well as globally," said Jayaram Naidu, vice president of Southeast Asia for Bombardier Transportation. Bombardier's presence in Malaysia began in 1992 as lead supplier for the 27-km. Kuala Lumpur Sri Petaling and Ampang Line. Since then, several Bombardier transit systems have been delivered for the Kuala Lumpur International Airport and the Kelana Jaya LRT, linking the western and eastern suburbs with Kuala Lumpur's downtown core. In 2017, the Kelana Jaya LRT network became the city's busiest line, moving up to 255,000 passengers daily.

#### **China Juggernaut**

As with many endeavors, other countries' rail investments pale in comparison to the scale found in China. In October, the latest \$324-million contract awarded to Chinese joint venture Bombardier Sifang (Qingdao) Transportation Ltd. (BST) by China Railway Corp. (CRC) was

## **In China, high-speed trains have changed people's life dramatically."**

— Jianwei Zhang, *President, Bombardier Transportation China*

lines. Combined, the two lines total 102 km. (63 miles) in length and serve 61 stations, with an average daily combined ridership of more than 1.8 million. The new order brings the number of MOVIA vehicles in Singapore to 672 — one of Bombardier's largest metro fleets in the world.

In September, Bombardier Transportation signed an MOU with the Malaysian Industry Government Group for High Technology (MIGHT) outlining their collaboration on developing home-grown rail industry expertise. The company has been actively implementing a graduate program over the last two years along with university associations to prepare young talent as well as expand their capabilities in the rail industry, driven in part by a Rail Industry Development Blueprint developed by MIGHT in 2012.

"With several significant collaboration milestones in Thailand, Singapore and Malaysia focused on to developing local talent over the

for 120 CR400AF new high-speed train cars for China's evolving high-speed rail network, where cars operate at 350 kmh (217 mph).

"In China, high-speed trains have changed people's life dramatically," said Jianwei Zhang, president of Bombardier Transportation China, noting that they help to "close the distance between villages and cities," bridge the gaps between rural and urban, and speed up economic growth.

BST in early December celebrated the 20th anniversary of its factory. A few days later, another order came from CRC for 168 more high-speed train cars. Bombardier Transportation in China has six joint ventures, seven wholly foreign-owned enterprises, and more than 7,000 employees who altogether have delivered more than 4,000 railway passenger cars, 580 electric locomotives and over 2,500 metro cars, Monorail, APM (Automated People Mover), and trams to China's growing urban mass transit markets. ▼

Location,

Location,

# Changxing



Not far from Shanghai lies a Chinese county, and a development, that are quickly becoming magnets for foreign direct investment.

With a population of 640,000, Changxing boasts many of the attributes so common in booming Chinese industrial areas: airports, high-speed rail, an intricate highway system, waterways and international ports. What, then, makes Changxing special?

Well, everything.

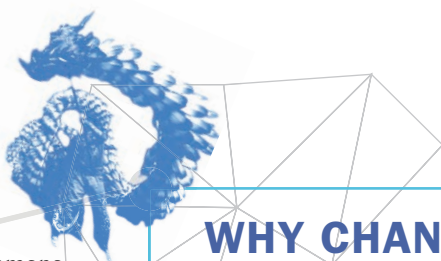
The well-known real estate adage states the three most important factors in site selection are location, location, location. Changxing has that in droves.

Situated in the heart of the Yangtze River Delta on the border of Lake Taihu, Changxing lies within a 90-mile (150-km.) radius of over 50 large and medium size cities, including Shanghai, Hangzhou, Nanjing, Ningbo, Suzhou, Wuxi and Wuhu, with a combined population of more than 80 million people. Changxing, says one American businessman, “is in the middle of everywhere.”

Established in 1992, Changxing Economic and Technological Development Zone is a state-level opportunity zone with a total area of 18 sq. miles (47.5 sq. km.), conceived to attract foreign investments, advanced manufacturing and independent innovation. Since 2003, it

by GARY DAUGHTERS  
gary.daughters@siteselection.com





## WHY CHANGXING?

has ranked among the Top 10 Zones in Zhejiang Province seven times, and has twice been awarded as the zone with the best investment value in the Yangtze Delta.

More than 400 companies, including Fortune 500 enterprises and international investors from Germany, the U.S., France, Italy, Canada, Australia, Turkey,

Japan and South Korea, have set up shop in the zone. Some of the best-known companies include General Electric, Johnson Controls, Takata, Hisense, Noblift and Key Safety Systems. Changxing Economic and Technological Development Zone has three major target industries.

### **New Energies and Electric Mobility:**

Changxing is a major production hub for batteries, electric cars and photovoltaics. In 2016, it became the Electric Vehicle Industrial Base of Zhejiang Province. Tianneng Group and Chilwee Group, two of China's largest battery manufacturers, have their headquarters within the zone. In one of the region's top investments, China's Geely Auto is sinking \$4.7 billion into its New Energy Automobile Investment Project, which consists of an assembly plant, headquarters and industrial park.

### **Intelligent Machinery and Equipment:**

Changxing is a leading base for high-end equipment manufacturing with a focus on warehouse equipment such as pallet jacks, scissor lifts and forklifts, as well as intelligent logistics solutions including automated transport systems and mechanical parking equipment. In addition, firms within the zone produce PET injection molding machines for bottle packaging, food packing machines and other machinery components such as dies and molds.

**Healthcare:** In recent years the healthcare sector has witnessed rapid development. Biomedicine, functional health foods and medical equipment are key components of Changxing's emerging healthcare cluster. Major firms within the cluster include Clover Biopharmaceuticals, Changxing Pharmaceuticals, AGSW

- Population of 80 million within 90 miles
- Abundant transportation links
- Lower costs than megacities
- Comprehensive infrastructure built to western standards
- Support options and incentives
- Easy, fast procurement of licenses and permits
- Workforce training
- Intellectual property rights
- Full support of local government

Biopharmaceuticals and Jinbakai.

Located with the zone, Changxing International Industrial Park focuses on small and medium-sized enterprises from North America and Europe, with an emphasis on German-speaking countries. With full buildout projected at 1,235 acres (500 hectares), a pilot area of 25 acres (10 hectares) is

currently under construction to Euro-American standards.

The park's infrastructure, fully developed already, includes roads, parking lots, utilities and internet service. Abundant green space is planned for the park, which will also include a media center, gymnasium, food catering and a bar complete with German beer. Target sectors for the park include new energies, automotive, electric mobility, batteries, robotics, electrical engineering and HVAC.

Thanks to vocational schools and technical colleges such as Changxing Vocational and Technical Education Center, Changxing Technical College and Qunying Technical School, Changxing has emerged as a major training center for skilled workers.

"Hiring is not an issue for us or our clients," says Jason Lee of Eastern American, a Boston-based design-build contractor in Changxing. "Local officials were able to assist us in reaching out to multiple local academies and vocational schools. We were amazed."

Through partnerships with vocational centers in the German cities of Fulda and Offenbach, Changxing has implemented the German "dual training" system, whereby trainees spend part of each week at a vocational school and the rest of the week at a company. Zhejiang University of Science and Technology has established a Sino-German Engineering College with 5,000 students. Enrollment at vocational and technical schools totals some 20,000 students.

"Changxing," says Lee, "has the resources, location, people and services that a multinational company like us would look for. It's been the best experience we've had in China." ▼



This Investment Profile was prepared under the auspices of the Administrative Committee of National Level Changxing Economic and Technical Development Zone. For more information, call 86-572-6050093 or e-mail [cxkfq@foxmail.com](mailto:cxkfq@foxmail.com). On the web, go to [www.cxetdz.com](http://www.cxetdz.com).

by GARY DAUGHTERS  
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## 1 A Gift for the Holidays

The biggest gift of the holiday season may have gone to Austin, Texas. **Apple**, in mid-December, announced plans to build a \$1-billion campus in the Texas capital, where the company already enjoys a robust presence. The 133-acre (54-hectare) campus is to initially accommodate 5,000 additional employees, with the capacity to grow to 15,000. As part of Apple's blockbuster announcement, the company said it would add more than 1,000 employees over the next three years to its operations in Seattle, San Diego and Culver City, California, while adding hundreds of workers in Pittsburgh, New York, Boulder, Boston and Portland, Oregon.



Photo courtesy of Apple

## 2 New Options for Tech Talent







Photo courtesy of CP Images

## Toronto's New Technology Hubs

**A**ccenture, the global professional services firm, opened its 10th North American innovation hub on Nov. 27 in Toronto. Accenture says the hub, with more than 300 designers and data scientists, was conceived for side-by-side collaboration with clients. Accenture plans to add 800 new technology jobs in Canada by the end of 2020 while expanding its apprenticeship program, which is geared toward recruitment among under-represented communities. In mid-December, **Amazon** announced its own 600-job tech hub expansion in the city, where it already employs 800 corporate staff.



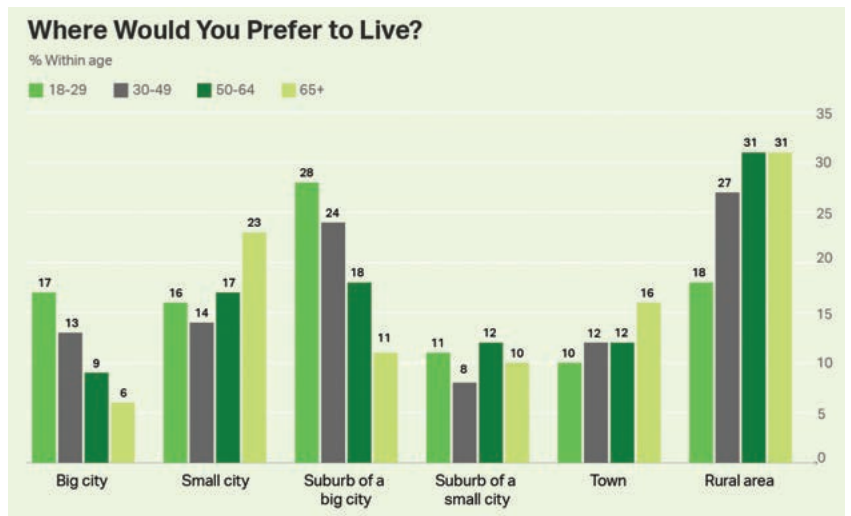
## Bains Announces AI Funding

**C**anada's **Element AI**, a leader in the field of artificial intelligence, intends to create 900 new jobs through a \$5-million repayable loan from the Canadian government. The loan is part of a package of \$6.3 million in funding for six Montreal AI firms announced December 5 by Navdeep Bains (pictured), Canada's Minister of Innovation, Science and Economic Development. "Artificial intelligence is transforming all industries and sectors, opening up more opportunities for Canadians," Bains said. Investments totaling \$1.3 million are expected to create 77 jobs at Montreal's Imagia, Keatext, Inc., ARA Robotics, Inc., C2RO Robotics Inc. and Roof Ai. The investments are being administered through the Quebec Economic Development Program.



## 5 The Lure of the Country

**A** new **Gallup poll** finds that if Americans could sort themselves geographically according to their desires, the nation would see an out-migration from big cities and, to some degree, from small cities and towns, and a substantial movement into rural regions.



by GARY DAUGHTERS  
gary.daughters@siteselection.com

# 1 Ready When You Are

**T**algo, a family-owned company based in Spain, announced plans to hire 1,000 people for a projected 753,000-sq.-ft. (70,000-sq.-m.) factory in Longannet, Scotland, to make high-speed railcars. A second site, the former Hartington Colliery in Chesterfield, Derbyshire, will serve as an Innovation Center, and part of Talgo's plans to develop an "All Britain" strategy. The projects are initially focused on the UK market, but will eventually be geared toward export. Talgo says it is seeking an "anchor client" before launching construction.

Photo courtesy of Talgo



3

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4

Real estate capitalization rates and yields are leveling off and rents are **growing in most markets**. We expect advanced economies to slow in 2019, but still remain in growth mode.”

— UBS Real Estate and Private Markets Real Estate Summary 2018

# 2 Ode to Oodi

**A**s public libraries worldwide face budget cuts and closures, Helsinki has sunk \$110 million into **Oodi**. Finnish for "Ode," the city's new central library was dedicated December 5, the eve of Finland's Independence Day, and feted as a gift to the Finnish people. Located adjacent to the Finnish Parliament in Helsinki's Kansalaistori Square, the 17,250-sq.-ft. (1,600-sq.-m.) space features book-sorting robots, a restaurant and café, audio-visual recording studios and a "makerspace" with 3D printers. Finns are some of the world's most literate people, and Finnish libraries are popular gathering spots during the frigid Scandinavian winter.



Images courtesy of Helsinki Marketing



# 3 Going Digging in Greenland

Greenland has doubled its number of active mines – to two – with the recent commissioning of the **White Mountain anorthosite (calcium feldspar) quarry**.

Canada's Hudson Resources, which has a 50-year license to operate the mine, expects to deliver its first shipment of processed anorthosite to Owens Corning in the U.S. in early 2019. Also found on the moon, anorthosite is primarily used in fiberglass. Greenland, whose economy is nearly totally reliant on fishing, has hopes of developing two more mines by 2022 in an effort to add new revenue streams.



Photo courtesy of Hudson Resources

2

5

# 5 Up, Up and Away

At 11 stories and 1.8 million sq. ft. (167,225 sq. m.), **Facebook's** first data center in Singapore will be one of the largest such structures in the world. Singapore's scarcity of available land dictated the vertical design of the \$1-billion project, scheduled for completion in 2022. Google operates a five-story data center in Singapore, its tallest data center anywhere in the world. A novel liquid cooling system allows for reduced water consumption in Singapore's hot, humid climate.

Image courtesy of Facebook



Image courtesy of Siemens



# Siemens Returns to its Roots

Manufacturing giant **Siemens** announced plans for **Siemensstadt (Siemens City) 2.0**, a \$681-million industrial and technology hub in Berlin, where its predecessor company set up factories at the end of the 19th century. The company says the 173-acre (70-hectare) project in the German capital's Spandau district is to transform a large industrial area into a modern, urban district of the future to promote innovation and collaboration in fields such as distributed energy systems and energy management, electric vehicle technology, machine learning, artificial intelligence and blockchain.

# Show Me the Workforce

Site Selectors say job skillsets are the driving factor in location decisions.



by RON STARNER  
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**T**hink your workforce challenges are growing? You're not alone. Site consultants surveyed by Site Selection magazine in October say that workforce is the No. 1 factor driving expansion or greenfield location decisions for their corporate clients today.

Outpacing No. 2 factor transportation infrastructure and third-place available buildings and sites, workforce is now the location variable dictating where projects are going.

This theme has been constant for several years now, as consultants increasingly say they are struggling to identify critical skillsets in sufficient numbers for their corporate clients. As a result, workforce training and development incentives are increasing in importance as well.

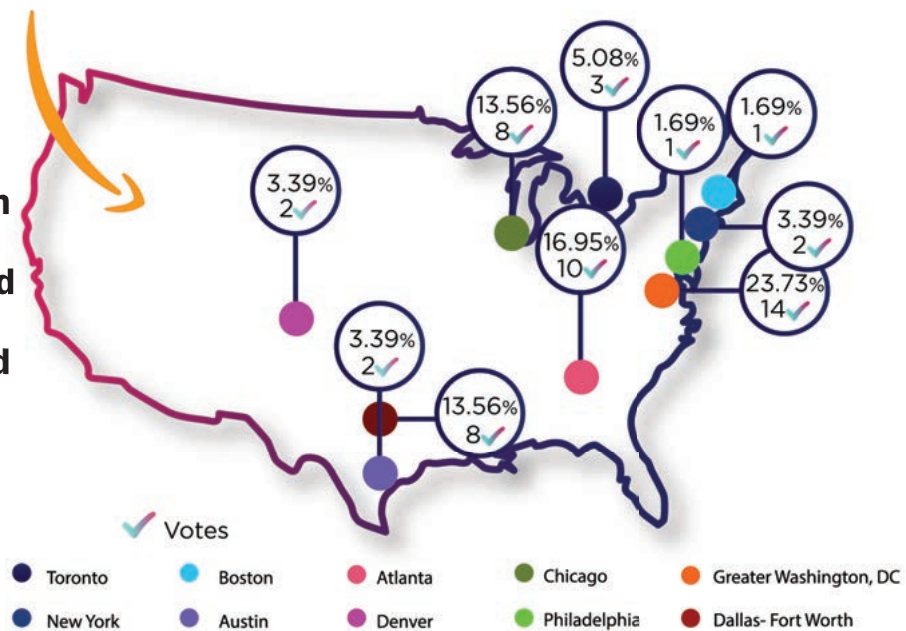
State and local tax structure now ranks as the fourth most important location factor, just ahead of regulatory environment and incentives. Utilities check in at No. 7, followed by university and college resources at No. 8 and cost of real estate at No. 9.

The 60 responding site consultants also noted that:

- Headquarters and back-office operations tied with advanced manufacturing as the most active project sector, just ahead of logistics projects.
- They are increasingly turning to various online resources, industry publications and professional associations for information in their field. Their peers came in fourth, just



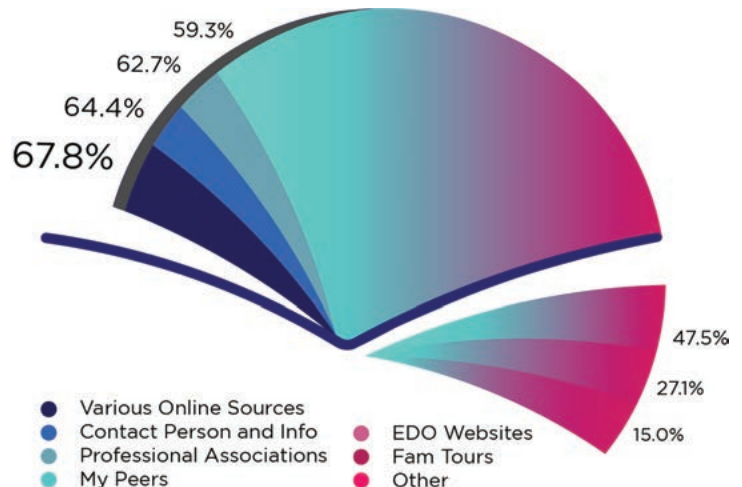
**If you were advising Amazon on where to locate its second headquarters, which city would you select?**



- ahead of economic development websites.
- The No. 1 deal-killer was politics or lack of responsiveness, followed by lack of available qualified labor.
  - Adopting better incentives is the policy change they most recommend, followed by improving education and the workforce.
  - Accurate and up-to-date data is the resource they most want to find on an EDO website, followed by a contact name and information.
  - Greater Washington, D.C., was far and away the leading vote-getter as the top choice for Amazon's HQ2, getting 14 nods, while New York City garnered only two votes. Atlanta received 10 votes, while Chicago and Dallas each got 8.

The consultants also shared some interesting views on locations and their competitiveness. When asked to name the state that had done the most to improve its overall attractiveness to business and industry over the last 5 years, Texas garnered the most votes, with 12. North Carolina finished second with 5 votes, followed by Ohio and South Carolina with 4 votes each. Georgia, Michigan, Indiana, Nevada and Wisconsin each secured 3 votes.

### Where site selection consultants turn for information





# Why Executives Love

# COLUMBUS

If you want to know how the Columbus Region works as a business destination, the best place to turn is the business community itself. The following are the actual words of business leaders who have made a habit of doing business in Greater Columbus:

- “Columbus provided Jifiti with an ideal breeding ground for our retail technology business. We found the Columbus community to be both empowering and supportive during the critical stage of startup mode. It is this environment that enabled and propelled us to achieve that which we have thus far, and for that we are eternally grateful.” – *Yaacov M. Martin, Co-Founder and CEO, Jifiti, an online gift registry platform that chose Columbus as its U.S. startup hub and has since taken the global retail gift registry world by storm*



Photos of Columbus, Ohio courtesy of Getty Images

- “What strikes me most about Columbus is the diversity of its economy, housing industry leaders in retail like L Brands, Abercrombie & Fitch, Express, DSW, in banking like Huntington and JP Morgan Chase, in insurance like Nationwide and most recently logistics, a booming sector, and where Boyd e-commerce client Gwynnie Bee operates one of its most successful fulfillment centers in the popular Columbus submarket of Groveport. Gwynnie Bee leverages the logistics advantage

for Columbus being that it is within a 10-hour drive of about half of the U.S. population. Our client JP Morgan Chase has put its stamp of approval on Columbus in a big way by growing to be the largest private sector employer the city. I understand its CEO Jamie Dimon was in Columbus just last month and spoke highly of the Columbus workforce and the bank’s ability to recruit top talent there.” – *John H. Boyd, Principal, The Boyd Company Inc., site selection consulting firm based in Princeton, N.J.*





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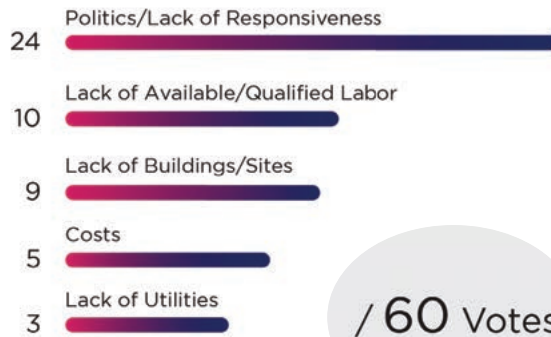
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## Most Common Deal Killers



/ 60 votes

When asked to name the U.S. region or metropolitan area that had most improved its attractiveness, respondents said the Midwest and the Southwest tied for first, with 7 tallies each. The Southwest, Greater Columbus, Ohio, and Dallas-Fort Worth were all next with 5.

Finally, the consultants offered advice to states and communities on how to improve their chances of landing more projects. Here is a sampling of their comments:

- “Create a program that incentivizes students to remain in the state after graduation.”
- “Reduce the overall tax burden on businesses.”

- “Have less channels for regulatory decision-making.”
- “Offer flexible incentive programs that can be tailored to a company’s needs, rather than a one-size-fits-all program.”
- “Fully fund the cost of technical education.”
- “Offer employers an excellent public school system.”
- “Embrace the Work Ready program.”
- “Eliminate all sales tax associated with energy usage.”
- “Incentivize localities and regions to work together on infrastructure.” ▼





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# astern promises

**How Amazon turned the world upside down to deliver HQ2 packages to New York and Virginia.**

by RON STARNER

ron.starner@siteselection.com

**T**ype “relentless.com” into your web browser and it takes you straight to the home page of **Amazon.com**.

That’s fitting, because “relentless” is the perfect word to describe every aspect of the 14-month-long site selection process that ended on November 13 when Amazon announced the two winning juggernaut’s HQ2: Crystal City, Virginia, and Long Island City, New York.

From day one of the project RFP release on September 7, 2017, until the site announcement 432 days later, media coverage of the process didn’t stop. If it seems like every expert and quasi-expert offered their opinions on where the \$178-billion, 613,000-employee Amazon would go, it’s because they did.

Along the way, 238 locations submitted bids to land HQ2, 20 finalists were selected, and two winners were announced (three if you count Nashville; see related story on page 170). Officials in New York and Virginia each celebrated the awarding of \$2.5 billion in capital investment and 25,000 high-wage jobs in their respective states. Here’s how they did it:

### **Yes, Virginia, There is a Santa Claus...**

... And his name is Jeff Bezos. From the moment the world’s richest man purchased a \$23-million, 27,000-sq.-ft. mansion in Washington, D.C., speculation centered around the Greater Washington market as the frontrunner to snag HQ2. It didn’t hurt





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**“We made an offer we felt was prudent for the Commonwealth. If we made an offer purely on incentives, we were going to lose.”**  
—Stephen Moret, President & CEO, Virginia Economic Development Partnership

that Amazon named three locations in that MSA as finalists: D.C., Northern Virginia and Montgomery County, Maryland.

The National Landing site in Crystal City in Arlington ultimately offered Amazon what it wanted: access to a deep and talented pool of tech and headquarters professionals in a thriving urban environment. The site is less than three miles from downtown Washington and is served by three Metro stations and Reagan National Airport.

“The community has a variety of hotels, restaurants, high-rise apartment buildings, retail and commercial offices,” the company stated. “National Landing has abundant parks and open space with sports and cultural events for residents of all ages throughout the year.”

A \$750-million incentive package approved by the state sealed the deal. Amazon will receive performance-based incentives of \$573 million based on the company creating 25,000 jobs in

Arlington that pay an average annual wage of over \$150,000. This includes a workforce cash grant of up to \$550 million based on \$22,000 for each job created over the next 12 years.

Amazon will also receive a cash grant from Arlington of \$23 million over 15 years based on the incremental growth of the existing local Transient Occupancy Tax, a tax on hotel rooms.

In return, Amazon pledges to construct a 4-million-sq.-ft. campus that is expandable to 8 million sq. ft. — a project that will result in estimated incremental tax revenue of \$3.2 billion over 20 years as a result of Amazon’s investment and job growth.

Additional incentives include infrastructure funding of \$195 million by the state into improving the Crystal City and Potomac Yards Metro stations; building a pedestrian bridge connecting National Landing and Reagan National Airport; and upgrading the pedestrian experience crossing Route 1. Arlington will also

Proximity to transit and to talent were big pluses for the Crystal City location chosen by Amazon.

Photo by Jeanine Finch courtesy of City of Arlington







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dedicate an estimated \$28 million based on 12 percent of future property tax revenues earned from an existing Tax Increment Financing district for on-site infrastructure and open space in National Landing.

“This is a big win for Virginia,” said Gov. Ralph Northam. “I’m proud Amazon recognizes the tremendous assets the Commonwealth has to offer and plans to deepen its roots here. Virginia put together a proposal for Amazon that we believe represents a new model of economic development for the 21st century.”

#### **Assembling an Army of 500 Responders**

For Virginia Economic Development Partnership President and CEO Stephen Moret, the deal marked the culmination of 14 months of hard work. “We started on September 7 of last year,” he says. “We put together three world-class proposals — one each for Richmond, Hampton Roads and Northern Virginia. There was a very

intense effort on the front end.”

The first six weeks brought a whirlwind of activity, he notes. “Those three proposals were about 1,000 pages. We put together custom websites, custom drone videos of the sites and tons of new content. Once they pared the list down to 20 locations, Amazon scheduled a visit to check out four sites in Northern Virginia. They came to learn more about the sites, our colleges and our K-12 system.”

The second round was “an enormous undertaking” that involved the work of more than 500 people in Virginia, says Moret. “It was much bigger than the original proposal. They had questions about talent and growth, etc. They got more focused on the National Landing Site in Arlington and our site in Alexandria. We then put together an MOU.”

Everything about the project was unprecedented, Moret says. “It was a site competition for a major project on steroids.



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It was just a much bigger project and more on the public stage. We were not going to compete primarily on incentives. It was not a large offer in a national context. More than 70 percent of our commitment was an investment into public assets like higher education and transportation infrastructure. The remainder was all post-performance.”

Project Cooper changed in two substantial ways: First, when it was divided into two projects, and second, when the average annual wage increased from \$100,000 to \$150,000. “That was a big, big deal for us,” says Moret. “The costs did not go up at all.”

The Virginia Major Employment and Investment (MEI) Project Approval Commission approved the deal, which now must go to the full Virginia General Assembly for a vote in January.

“We never really changed the basic structure of our offer,” says Moret. “It did go down when the total jobs numbers went down. We needed to

have a credible offer. We made an offer we felt was prudent for the Commonwealth. If we made an offer purely on incentives, we were going to lose.”

#### **Taking a Bite Out of the Big Apple**

New York officials took a similar approach to wooing Amazon. While New Jersey offered Amazon \$7 billion in incentives and Maryland pledged \$8.5 billion, New York put together an MOU that outlines \$1.7 billion in incentives from the Excelsior Jobs Program via tax credits and from Empire State Development via a capital grant.

In return, Amazon promises to invest \$2.5 billion and create 25,000 high-paying jobs in Long Island City in Queens, just across the East River from Midtown Manhattan and the Upper East Side in New York City. By locating there, Amazon nabs a talent-rich environment known as a place where the arts and industry intersect.

“It is a diverse community with a unique

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The location where Amazon will establish a new corporate headquarters in Long Island City, Queens.

Photo: Kevin P. Coughlin/Office of Governor Andrew M. Cuomo

blend of cultural institutions, arts organizations, new and converted housing, restaurants, bars, breweries, waterfront parks, hotels, academic institutions, and small and large tech sector and industrial businesses,” Amazon noted. “Long Island City has some of the best transit access in New York City, with eight subway lines, 13 bus lines, commuter rail, a bike-sharing service, and ferries serving the area, and LaGuardia and JFK airports are in close proximity.”

As in Virginia, Amazon plans to construct a 4 million-sq.-ft. campus in Queens, expandable to 8 million sq. ft., and generate an estimated incremental tax revenue of more than \$10 billion over 20 years as a result of investment and job creation. City and state officials forecast a 9-to-1 return on investment.

The total state and local incentives package for Amazon could reach \$2.8 billion if the company meets all targets and qualifies for all performance-based payments. That would come about if Amazon employs 40,000 workers by 2034 at an average annual salary of \$150,000 and reaches \$3.6 billion in total investment. The company is separately applying for as-of-right incentives including New York City’s Industrial & Commercial Abatement Program (ICAP) and New York City’s Relocation and Employment Assistance Program (REAP).

Gov. Andrew Cuomo called the deal his biggest win yet. “When I took office, I said we would build a new New York State — one that is fiscally responsible and fosters a business climate that is attractive to growing companies and the industries of tomorrow,” he said. “We’ve delivered on those promises and more, and today, with Amazon committing to expand its headquarters in Long Island City, New York can proudly say

that we have attracted one of the largest, most competitive economic development investments in U.S. history.”

New York City Mayor Bill de Blasio joined in, saying, “This is a giant step on our path to building an economy in New York City that leaves no one behind. We are thrilled that Amazon has selected New York City for its new headquarters. New Yorkers will get tens of thousands of new, good-paying jobs, and Amazon will get the best talent anywhere in the world.”

### End of an Era, or Start of a New One?

Greg LeRoy, executive director of Good Jobs First in Washington, D.C., said he was not surprised that Amazon chose New York City and Northern Virginia. “I said from day one that a company this sophisticated in site location must have known the list long before it launched the public auction,” he says. “Incentives seldom affect where companies locate. They could have gotten a lot more in Pittsburgh.”

So, in the end, what were the decisive factors? “We learned that executive talent meant everything. It was factor one, two and three combined,” says LeRoy. “Secondly, I was always skeptical they could hire 50,000 brainiacs in any one market. They had to split it up.”

On the plus side, he says, “I don’t think the American public have ever been so educated on the site location consulting industry and the incentives sector. They did not understand how secretive the negotiating process is at the front end of the deal. If there was ever a moment when we as a country could revisit this whole system and rewrite the rules to prevent another HQ2 process like this one, now is the time.”

Will other firms follow Amazon’s lead and embark on highly publicized site searches? No, says LeRoy. “I don’t think this is new norm. Everything will revert to the old system. It will become secretive again,” he adds. “Everybody was burned out by this process.”

Noted author, economist and speaker Richard Florida, however, does not think the process is over. “I said from the beginning that this was about more than a single HQ2 site,” he says. “It was about siting many things. I think these three announcements in New York, D.C. and Nashville are just a start. There will likely be more.” ▼





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by JOHN H. BOYD  
 editor@siteselection.com



In his Inaugural Address President Gerald Ford’s statement “Our long national nightmare is over ...” referred to the impeachment and resignation proceedings of President Richard Nixon after the Watergate scandal. Many of us in the site selection community no doubt expressed similar sentiments when the long, winding and at times unseemly 14-month Amazon HQ2 search concluded on November 13, 2018 — one week after the mid-term elections, a date our firm had gone on the record to predict.

While over-the-top and in-your-face as only an Amazon could pull off, HQ2 is very much in sync with the heightened trend of corporate headquarters mobility. Today, corporations are no longer keeping the headquarters location off the table when it comes to restructuring, cost-cutting and re-branding their companies. Head offices are now just as footloose as any office, plant or warehouse of the modern corporation.

I have witnessed a number of high profile, trend-setting corporate headquarters relocations over the years, including those of longtime Boyd clients such as Sun Life Financial, which was the face of corporate head office migration from Montreal to Toronto during the separatist movement in Quebec in the late '70s; UPS, whose move from Greenwich, Connecticut, to Atlanta in 1991 brought into the modern era

Atlanta’s reputation as a major international center for transportation and logistics; and our Boeing client, whose move from Seattle to Chicago in 2001 ushered in the current era of accelerated head office mobility and the crafting of headquarters-specific state incentive programs.

But for all of the fanfare and trend-setting significance of those three high-profile moves, they all pale in comparison to the epic, transformative HQ2 search, clearly one for the ages.

Due to the magnitude of the project and duration of the search, HQ2 brought our cottage industry of corporate site selection out of the shadows of confidentiality and shroud of client anonymity and into the sunlight. The media’s fascination with the e-commerce giant Amazon and its founder, Jeff Bezos, along with the 24-hour news cycle, propelled this epic search from the back pages of the business section to front-page news. I have even been approached to write a book on the search with an eye toward a movie script. I am sure the legendary late McKinley “Mac” Conway, founder of Site Selection 65 years ago, would not believe it, seeing the industry he created “going Hollywood.”

**Some Takeaways from HQ2**

When it comes to the controversial topic of incentives, Amazon, for years, has been a master



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of securing hefty financial incentives from local and state governments for its North American network of warehouses and fulfillment centers. Not surprisingly, Amazon brought its “A” game to the negotiating tables for HQ2. New Jersey pledged \$7 billion in incentives, Pennsylvania offered \$4.5 billion, New York offered \$2.8 billion, Virginia offered \$750 million, North Carolina offered over \$1 billion, although the exact number has not been released.

The notion of giving the richest man in the world millions of dollars in incentives was low-hanging fruit for the anti-incentive movement led by people like progressive Senator Bernie Sanders, futurist Richard Florida and free market libertarian groups like the Cato Institute and the anti-incentive think tank, the John Locke Foundation. There was a bit of irony here too, as Amazon placed its New York HQ2 smack in the middle of the district of newly elected Alexandria Ocasio-Cortez, the ultra-progressive firebrand

who has already come out strongly against Amazon’s incentive windfall. Expect to hear more from her in the days ahead.

Agree with them or not, incentives are now ingrained into the corporate site selection process. Today, our clients want it all. They want us to recommend the optimum location for their plant or office and then have government step up to help write down the cost of the move. The harsh reality is that incentives are a necessary evil when it comes to a city’s being in the game, especially for trophy projects like HQ2 and for states with comparatively high taxes and high costs of doing business.

To those who oppose incentives, I would have them challenge the politicians to first do the heavy lifting of pension reform, lowering taxes, easing onerous regulations and generally making business climates more friendly. Another point here is that most incentive packages go beyond tax credits and abatements and often

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include things like infrastructure investments and workforce training grants that serve a greater public good and enhance the overall operating environment for small business and entrepreneurs.

### The Split

Of all the drivers in the HQ2 site search, it was available talent that ruled the process from day one. The decision to split HQ2 into two cities was not at all surprising given record low unemployment rates coast to coast and the robust national tech economy. What was surprising is how late in the curve Amazon indicated they were moving in that direction. At the outset of the search, it should have seemed a bridge too far that any market, regardless of how large it is, could provide and sustain a 50,000-strong high-tech workforce.

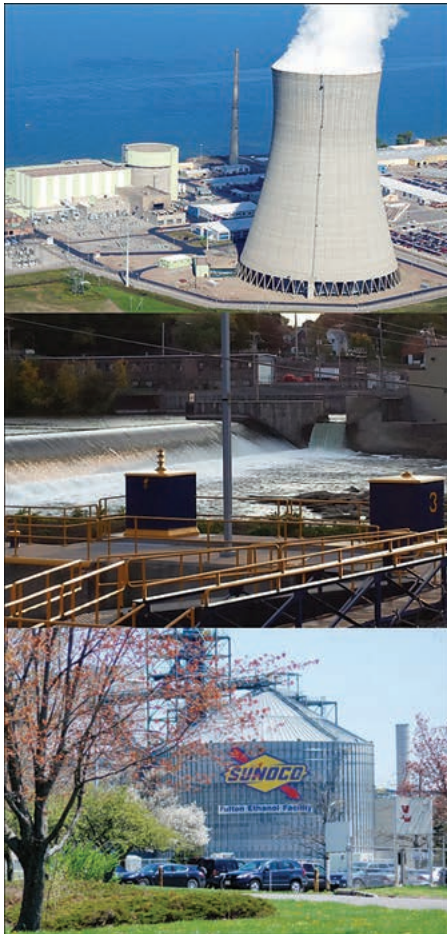
That said, recruiting 25,000 workers in each of the two winning cities will be no walk in the park

for Amazon's HR team. I would not be surprised to see additional satellite offices in proximate locales having quick access to Crystal City and Long Island City getting a sliver or spillover of HQ2 jobs. A Newark satellite office of Long Island City or Baltimore satellite office of Crystal City would fit this bill nicely.

### My Take on the Winners

I know both Long Island City, New York, and Crystal City, Virginia, very well. My first site selection experience with Long Island City was warehousing-related, when Sony housed a huge inventory of its consumer electronics during the heyday of its Walkman, Trinitron TV and video recorder sales. (In those days, that was the tech economy.)

The New York media is now giving a loud voice to the backlash against Amazon's Long Island City decision. Many New Yorkers feel the area is already too congested and are concerned about



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the negative impact the project will have on the poor in this rapidly gentrifying community. Critics point to Amazon's record in Seattle where its highly paid workforce led to unsustainable gentrification, along with skyrocketing home prices and rental rates, congestion and a sharp rise in homelessness.

Crystal City puts Amazon close to tech talent, but also closer to government leaders, cloud customers and the U.S. Department of Defense.

Make no mistake about it, Amazon's 25,000 workers in Crystal City will present recruiting challenges for both Amazon and the Feds. For Amazon, the challenge will be hiring government workers that can adapt to a more competitive, fast-paced and less secure environment. For Uncle Sam, the challenge will be competing for upwardly mobile talent with goliath Amazon's higher pay, bonuses and superior career potential.

Another takeaway of the Crystal City decision is a new talking point for relocating government agencies out of Washington to other cities around the country. This is a concept which pre-dates HQ2 but is now gaining momentum and rare bipartisan support post-HQ2. President Trump has long indicated support for moving government agencies out of Washington as a way to "drain the swamp," and Democrats view this as a huge economic development opportunity for their home districts.

Think about a move of the U.S. Weather Service to Miami or New Orleans, a move of the Food & Drug Administration to Chicago or Minneapolis, a move of the Department of Transportation to Atlanta or Memphis, a move of the Department of the Interior to Denver or Phoenix or a move of the Department of Agriculture to Kansas City or Omaha. Let's face it, government administrators can interface with elected officials and participate in hearings from anywhere in the country — all they need is WiFi. A migration of federal agencies from the nation's capital to the hinterlands would also free up millions of sq. ft. of valuable, tax-paying real estate in the very hot Washington market.

#### **Nice Win for Nashville**

Along with winners Long Island City and Crystal City, Nashville was named as the site for Amazon's new Center of Excellence for Operations, its unit that is responsible for the company's transportation and supply chain operations. Nashville will receive 5,000 jobs.

This was not a big surprise to me. Nashville and Middle Tennessee house a universe of supply chain professionals from the auto industry, which has major facilities in the region. Our logistics-savvy client, Dell, maintained a major global supply chain unit in Nashville.

What also helped Nashville win the Amazon supply chain unit is the Music City's recent attraction of the old-line Wall Street financial services company AllianceBernstein. This huge head office relocation from New York City went a long way towards elevating the stature of Nashville from an executive relocation standpoint. The Wall Street firm is bringing over 1,000 investment professionals from Manhattan to downtown Nashville, now in the big leagues of head office attraction with the likes of Atlanta, Dallas, Denver and Houston.

#### **Losers as Winners**

The cities that fell short — those 18 bridesmaids — won by losing. They got all of the public relations benefits of being in the mix for the largest and highest-profile corporate headquarters move in the history of economic development, while sidestepping all the burdens Amazon would place on infrastructure, housing and recruiting.

The HQ2 process allowed Pittsburgh to talk about its Robotics Row and Carnegie Mellon's leading AI program to a global corporate audience. It allowed Miami, the gateway to Latin America, to talk about South Florida's new Bright Line transit system, its multilingual skill sets and absence of a personal income tax. It allowed Raleigh to promote the world-renowned analytics program at North Carolina State University and the Tar Heel State's restructured tax incentive program. It allowed Toronto to talk about Canada's low corporate taxes, its liberal immigration and new free trade pacts with Europe and Asia. It allowed Newark to promote its premier fiber-optic infrastructure and transportation assets.

HQ2 also helped to form new coalitions among economic development operatives and local community leaders from the academic, political and business communities. The process also allowed losing cities to forge relationships with Amazon executives that could lead to new Amazon or Amazon subsidiary expansions in the months and years ahead. Post-HQ2, these new coalitions will live to see another day and end up being another arrow in the quiver of these



John Boyd



industry-hunting cities.

If I had to name two cities that were surprise no-shows to the list of 20 HQ2 finalists, I would name Charlotte and Minneapolis. Charlotte, still reeling from this, has fired its longtime economic development director and restructured its promotion agency. Minneapolis — the 14th largest metro in America — not making the top 20 was also surprising given Amazon's aggressive entry into the healthcare space.

Minnesota governor Mark Dayton was almost too eager to describe his state's incentive package as "restrained," a word heard by many as code for not really wanting HQ2 there. Other states offered modest packages but did not broadcast it. Contrast this with New York governor Mario Cuomo, who joked about changing his name to "Amazon Cuomo" in order to snag HQ2.

### New Social Impact Narrative

Amazon's HQ2 site search has given birth to a new head office site selection driver that we are terming "social impact." Politicians and the public are growing weary of large incentive packages awarded to deep-pocketed companies — especially when many of these same companies are facing potential anti-trust, data security and privacy challenges by government regulators. That said, one way these companies can mitigate backlash about incentives and curry the favor of the public and lawmakers is to promote their just business practices, i.e., those activities fostering

equitable growth and social equality.

We expect this to be a site selection rationale that poorer cities with first-rate head office markets — such as Detroit, Newark, Chicago and Miami — will be incorporating into their sales narratives to post-HQ2 prospects.

### Freeing the Logjam

Some of the nation's most prized commercial real estate assets have been in suspended animation during the long 14-month HQ2 search. These include prime real estate sites like: the Philadelphia Naval Yard, Suffolk Downs in Boston, Miami's Innovation District, the Gulch in Atlanta, Lincoln Yards in Chicago, Pittsburgh's Hazelwood Green, the Exposition Park site in Dallas, Denver's Lone Tree site and others.

Now that the shackles are off, we are hearing from local developers that these sites are open and very much back in business. In the days immediately after Amazon's announcement, we have seen a flurry of previously stalled projects like San Francisco-based alternative lender Affirm announcing a 500-worker center in Pittsburgh, online retailer GoPuff.com expanding in Philadelphia and Advance Auto Parts and Honeywell relocating their headquarters to Raleigh. Norfolk Southern's head office move to Atlanta, announced in December, was predicated on securing a deal with the city to purchase acreage in the Gulch District that was scouted by Amazon as a candidate site for HQ2. ▼



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# Post-Amazon World: Say

Site consultants use TrustBelt to call for better economic development practices.



# to Public Auctions

by RON STARNER  
ron.starner@siteselection.com

**W**hat's the real lesson of Amazon HQ2? It's how not to conduct a site selection process, says a panel of site consultants who expressed their dismay with the public spectacle.

"That was such a public process. I see a lot of pulling back from companies," says Ann Petersen, managing director of Cushman & Wakefield. "They are saying they do not want any public rumblings. They are being very selective about who they want to meet with. Confidentiality is even greater now."

The other site consultants who spoke on a panel at TrustBelt in Detroit recently agreed. "Tim Cook is the chairman of the board at Duke University. Apple had been very quietly negotiating with North Carolina about an opportunity there," said Derrick Mashore, senior vice president of CBRE. "That was 180 degrees away from what Amazon did."

Susan Arledge, president of site selection and incentives for ESRP Real Estate, said, "We all got sucked into Amazon's PR and marketing game. It was a brilliantly played marketing strategy. What have we learned? Communities learned better ways to market themselves, but the rest of us wasted our time."

Arledge added that the pervasive opinion among her clients now is simple: "They want to be where Amazon is not."

Petersen concurred, noting that "everybody thought they had a shot to win Amazon, but you have to hone in on your capabilities. My advice to communities is: don't waste your time on fruitless pursuits."

Ann Harts, executive vice president of site selection and incentives for ESRP Real Estate, said that Amazon may find it more challenging than it thinks to secure all the talent it needs in its chosen locations. "Cerner is already struggling





From left are Ann Harts of ESRP Real Estate; Susan Arledge of ESRP Real Estate; Derrick Mashore of CBRE; Ann Petersen of Cushman & Wakefield; and Jeff Forsythe of Forsythe & Associates.

Photo by Shay La'Vee

to hire 6,000 people in the Kansas City area,” she noted. “I thought Amazon could go to one of four cities across the country, but the labor market is very tight everywhere.”

On other topics, the consultants dispensed advice to both companies and communities. If you represent a location trying to win a competitive project, the consultants said, you should focus on these things:

- “Focus on your workforce pipeline,” said Jeff Forsythe, founder of Forsythe & Associates Inc. “Look at your workforce needs down the road, not just today.”
- “Have an open line of communication between the governor’s staff and your economic development staff,” said Petersen. “Overcome hurdles for your prospects.”
- “Focus like a laser beam on your competitive advantage,” said Mashore. “Every place has one. And then find a way to bridge that to talent. Talent is everything. HQ2 is going to be split between New York City and Greater Washington, D.C., and talent was the driver.” *(Editor’s note: Mashore made this statement a week before Amazon officially announced its selection of Long Island City in New York and Crystal City in Northern Virginia.)*
- “Continue to fund incentives for the next few years,” Arledge said. “Companies need to know that your support will be there.”
- “Continue to fund the commerce department in your state,” said Harts. “You lose an advantage when your state is not strong and is not solidly behind the growth.”



**We all got sucked into Amazon’s PR and marketing game. It was a brilliantly played marketing strategy. What have we learned? Communities learned better ways to market themselves, but the rest of us wasted our time.”**

— Susan Arledge, president of site selection and incentives for ESRP Real Estate

The consultants also expressed strong views on data and their impact on site decisions. “I remember one project where a community did not make the short list,” said Arledge. “It ranked 15th out of 15 locations on the list, but I knew that it still merited consideration. I can bring forth the objective data, but you (the communities) can bring forth the subjective data and show the company what you are doing to fix any problems. You can’t sell around a disadvantage.”

Petersen agreed, noting that “once we have done our data drill-down, that is when our experience comes into play. We may know of a market just outside of the heat map. That is where our trusted relationship with the client comes into play.”

Mashore summed up the thought for the panel by stating: “Never underestimate the power of human relations. Trust the data, but don’t trust the data more than you trust your intuition.”

Finally, the panel offered frank advice on familiarization tours. Speaking for everyone on the panel, Petersen cautioned, “Don’t put us on a bus and drive us around all day. Driving us around to look at sites for six hours a day is just awful. There is no value in that. Provide an experience that is unique to your community.”

Forsythe added, “Make the best use of the time. We don’t need to meet with your elected officials. These are business meetings when we come to town, so let’s talk business.”

Mashore advised locations to “be clear about your competitive advantage. What can you do that other areas cannot? Create a unique experience that showcases your unique value.”

Arledge issued a call to action: “Make us do our job. If you need more information, tell us.”

Harts closed by saying, “We treat you as trusted advisors. I like to meet you at events like this so that I can determine if you will be a trusted advisor.” ▼





## How Florida uses university-employer alliances to reshape the workforce.

by RON STARNER

[ron.starner@siteselection.com](mailto:ron.starner@siteselection.com)

**A** recent report that blue-collar workers are now scarcer in America than white-collar workers set off alarm bells in many states, but one place that's ahead of the curve is Florida.

Ranked fourth in the nation for high-tech employment by CompTIA, Florida

has nearly 237,00 high-tech workers, many of them in manufacturing and other blue-collar jobs that require special skills.

This doesn't happen by accident. Around the state, innovative programs are being developed to train the STEM workers needed by manufacturers, health-care providers and other trades.

The Tampa skyline is growing thanks to expanding firms like ReliaQuest.  
Photo by Ryan Ketterman



Case in point: BRIDG in NeoCity near Orlando. BRIDG is a not-for-profit, industry-led, public-private partnership for advanced sensors, photonics and next-generation nanoscale electronic systems. BRIDG offers the R&D capabilities and 200mm microelectronics fabrication infrastructure for manufacturing processes and materials geared toward system miniaturization and smart-sensor innovation — thus bridging the innovation development gap.

Supported by Osceola County, the University of Central Florida, the Florida High-Tech Corridor Council and others, BRIDG provides the physical infrastructure and collaboration opportunities that make commercialization possible. It's located at NeoCity, a 500-acre master-planned community in Osceola County about 20 minutes from Orlando International Airport.

"In 2012, we wanted to create something new for Central Florida: a STEM-focused technology campus that would have the same impact here as it had in Austin," says Chester Kennedy, CEO of BRIDG. "It was designed to play a leading role in the economic transformation of the region; that evolved into what we have today. Our first lot of microelectronic wafers came out last month."

#### **Land of Magic Is a Science Haven**

The breakthrough development is housed in NeoCity, a one-of-a-kind community comprised of more than \$200 million in investment from

public and private sources. "This is a place that allows companies to develop new microelectronic-based products," says Kennedy, who was recently named by Orlando Magazine as one of the 50 most powerful people in the region and a "Game Changer" by the Orlando Business Journal.

"We are in 109,000 square feet on five acres inside this 500-acre technology district," he says. "Our hope is that this becomes a catalyst for the entire region from a microelectronics standpoint. How do we help this country become strong in microelectronics? It starts here."

Partnering with higher-ed resources like UCF is a start. "A Florida Polytechnic University partnership is in place too," says Kennedy of the state's newest four-year university just off Interstate 4 in Lakeland to the west of NeoCity. "We're in the perfect location. As you look across this swath of Florida, from Tampa to the Space Coast, I don't think there's a more exciting place to be in the U.S. right now. People who are involved in autonomous vehicle testing come here. The military presence with Central Command is huge, and of course we have the space industry at Cape Canaveral. The space program is more alive today than it has ever been, and we're right in the middle of all that."

More expansions are planned for BRIDG and NeoCity. "We have a 100,000-square-foot office building that is more than halfway complete," Kennedy says. "We have a lot of demand for



lab space. A new STEM high school is under construction, NeoCity Academy, and several companies are considering building their own facilities here. This will be class A office space when it's finished. About 100 people work here now; around 5,000 employees will work on campus upon buildout. This is new and not common for this area."

Just 20 minutes from Disney World and Celebration, NeoCity is changing the way people think about tropical, tourist-friendly Florida, and it's not alone in the Sunshine State.

All around this state of 21 million people, partnerships are sprouting between schools and employers to close critical skills gaps, particularly in blue-collar STEM jobs.

Citigroup is partnering with the University of South Florida in Tampa to equip workers in fintech. UCF is partnering with Lockheed Martin on defense work, particularly in cybersecurity. Embry-Riddle Aeronautical University supports the rapidly changing space program on the Space Coast. The University of West Florida is working with financial institutions like Navy Federal Credit Union in Pensacola on cybersecurity and fraud prevention. Florida International University is teaming up with banks in Miami to do similar work.

These kinds of partnerships have become even more important as the nation's blue-collar workforce has shrunk consistently since the mid-1990s, according to a groundbreaking report released Dec. 13 by The Conference Board. As the report details, "growing blue-collar labor shortages result from converging demographic, educational and economic trends in the U.S. economy." Tight labor markets are especially visible in transportation, production manufacturing and healthcare.

"Over the next decade," the report concludes, "the extent of the challenges caused by blue-collar labor shortages will depend largely on three factors: to what extent employers can further automate blue-collar jobs; how many additional individuals are brought into the labor force; and how many workers move into blue-collar jobs from other parts of the labor market."

### **Made in Florida: STEM-ing the Tide**

In Florida, employers are not waiting for demographic trends to turn around. They're rolling up their sleeves and meeting these challenges head-on. For example, the Harris

Corp. announced plans on Dec. 10 to invest \$125 million in internal R&D this fiscal year in Florida, bolstering high-paying jobs and the company's innovation leadership in the state.

The announcement in Melbourne on the Space Coast includes investments in electronic warfare, robotics, avionics and smallsats, and it supports research partnerships with Florida companies and universities. Harris partners with UCF, USF and the Florida Institute of Technology in Melbourne. "These partnerships provide technological insight for Harris and increase company visibility to fill key technology positions," the company said.



Harris is one of the largest publicly traded firms based in Florida. It has 15 locations with 3.5 million sq. ft. of office and manufacturing space in the state, including the 464,000-sq.-ft. Harris Technology Center and 23,000-sq.-ft. Global Innovation Center in Brevard County.

In Tampa, Siemens and Chromalloy Gas Turbine Corp. celebrated the opening of their new joint venture, Advanced Airfoil Components, in October. The partnership represents a capital investment of \$139 million and creation of 350

BRIDG in NeoCity near Orlando is a unique partnership that is developing the microelectronic technology of the future. Photos courtesy of Seamus Payne/Skanska and BRIDG/NeoCity

jobs in Hillsborough County. New blue-collar jobs include technical engineers, manufacturing technicians and production workers, in addition to administrative positions in finance, human resources, procurement and logistics.

Florida ranks among the country's top 10 states for manufacturing and is home to more than 20,500 manufacturing companies. More than 363,100 Floridians work in manufacturing, and the state's schools regularly produce STEM graduates at a rate far exceeding the national average. In 2018, U.S. News & World Report ranked Florida as the No. 1 state for higher education for the second consecutive year.

**Jacksonville is a hidden gem. It's not too big, and it's not too small. It's central to large markets and has a lot to offer our employees and their families."**

— Brian Wolfburg, *President and CEO, VyStar Credit Union, Jacksonville*

Gains like these are a big reason why Florida is a national leader in workforce housing rent growth. According to a report released by CBRE last month, Orlando led the country with the highest workforce housing rent growth, 7.4 percent, for the year. A total of 11 metros in the U.S. had growth rates of 4 percent or more, including Tampa and Jacksonville.

Tampa has long been a leader in employer-university alliances. Tampa-based enterprise security provider ReliaQuest announced in October that it teamed up with USF on the creation of a \$1-million cybersecurity lab. Brian Murphy, founder and CEO of ReliaQuest, said the lab will focus on teaching students the skills they need to keep pace with a fast-changing industry.

"Having USF in our backyard is a huge advantage," he says. "It is a reputable university with a large student base. They have highly engaged professors that want the university and corporate tie-in. We're investing in the school by helping them co-teach and co-train."

Murphy founded ReliaQuest 11 years ago and has seen his company's recurring revenue double each year. "Total headcount now is over 300

companywide, and we will hire 200-plus people next year," he says. "We have reached capacity in our headquarters space and have started working with brokers to find our new home in Tampa. The skyline of Tampa is going to look very different over the next five years, and our growth will contribute to that."

### **Come for the Lifestyle, Stay for a Lifetime**

They're saying similar things in Jacksonville, where VyStar Credit Union bought the 23-story SunTrust Tower and is moving its 700-worker headquarters into the downtown high-rise. "VyStar started 66 years ago on the west side of Jacksonville," says Brian Wolfburg, president and CEO of VyStar. "We have 100,000 square feet and 500 employees on the west side, plus an 85,000-square-foot call center in Fleming Island, just west of Jacksonville. We were quickly running out of space and needed to find a new home. We met with the owners of the former SunTrust Tower and closed on the deal a couple weeks ago."

Wolfburg says that "Jacksonville is a hidden gem. It's not too big, and it's not too small. It's central to large markets and has a lot to offer our employees and their families. We've been growing at over 10 percent a year in assets and loan deposits, and our workforce has been growing in proportion to our membership and asset base. We'll grow our workforce by 15 percent over the next year. We're adding new departments as we prepare to go over \$10 billion in assets."

VyStar's meteoric rise would not be possible without the support the firm receives from local colleges and universities, particularly on the training side, he adds. "We created a chief digital officer position about six months ago to look at how a digital strategy can be utilized and to look at how we can use fintech to grow our business and better serve our members," he says.

"When I was looking for where I wanted to move to take on the role of CEO last year, Florida was not one of the locations that rose to the top of my list, and that was a shame," Wolfburg notes. "I thought it was a very busy and touristy location. Since then, I have come to love Florida and specifically Northeast Florida. This is a great community that has a lot to offer. Everyone realizes that they live in an amazing place. Our employees don't want to move away, and neither do I." ▼

This Investment Profile was prepared under the auspices of Enterprise Florida. For more information, contact Sean Helton at 407-956-5630 or [shelton@enterprise-florida.com](mailto:shelton@enterprise-florida.com). On the web, go to [www.enterprise-florida.com](http://www.enterprise-florida.com).





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by MARK AREND

[mark.arend@siteselection.com](mailto:mark.arend@siteselection.com)

**S**how me a governor who doesn't take advantage of every opportunity to invest in the next generation workforce in his or her state, and I'll show you a state that won't be competitive in a few years' time. Every state has its own circumstances, of course, from population to ratio of urban to

rural school systems to companies participating in apprenticeship programs and many other factors.

But as much as they have differences in demographic and educational attainment factors, they also have some things in common. They have legislatures that appropriate funds to education and workforce training programs,

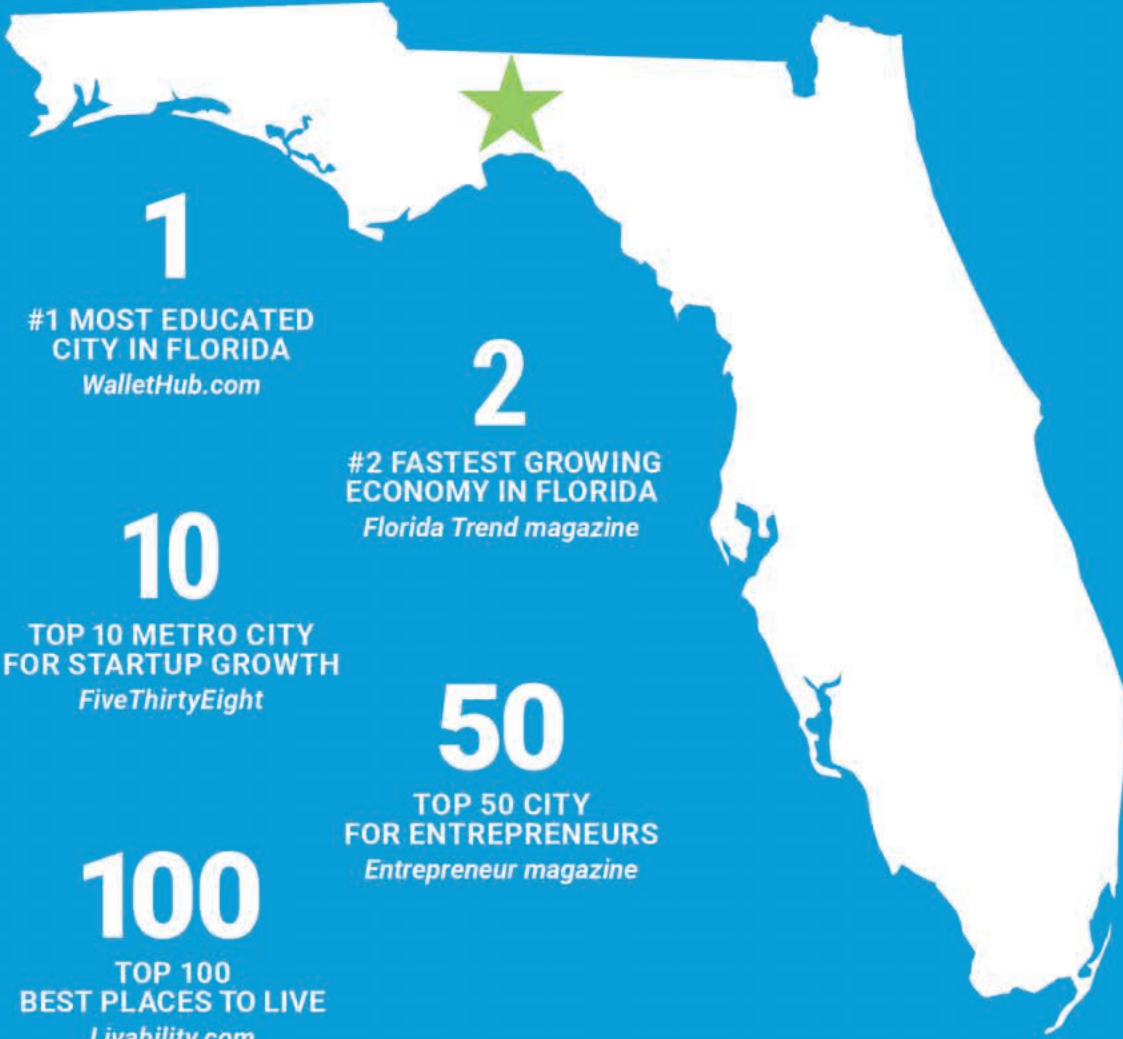
# WHY ARE SO MANY COMPANIES ATTRACTED TO FLORIDA'S CAPITAL REGION?

(THE WORLD'S LARGEST MAGNETIC LAB DOESN'T HURT.)

There are so many reasons to consider Florida's capital region for your business. Along with world-class research institutes like the National High Magnetic Field Laboratory, we're attracting a growing list of innovative companies, cultural offerings and workforce training options – plus our fair share of accolades. You also could say we attract a lot of success.

[oevforbusiness.org](http://oevforbusiness.org)





Meet our regional partners:

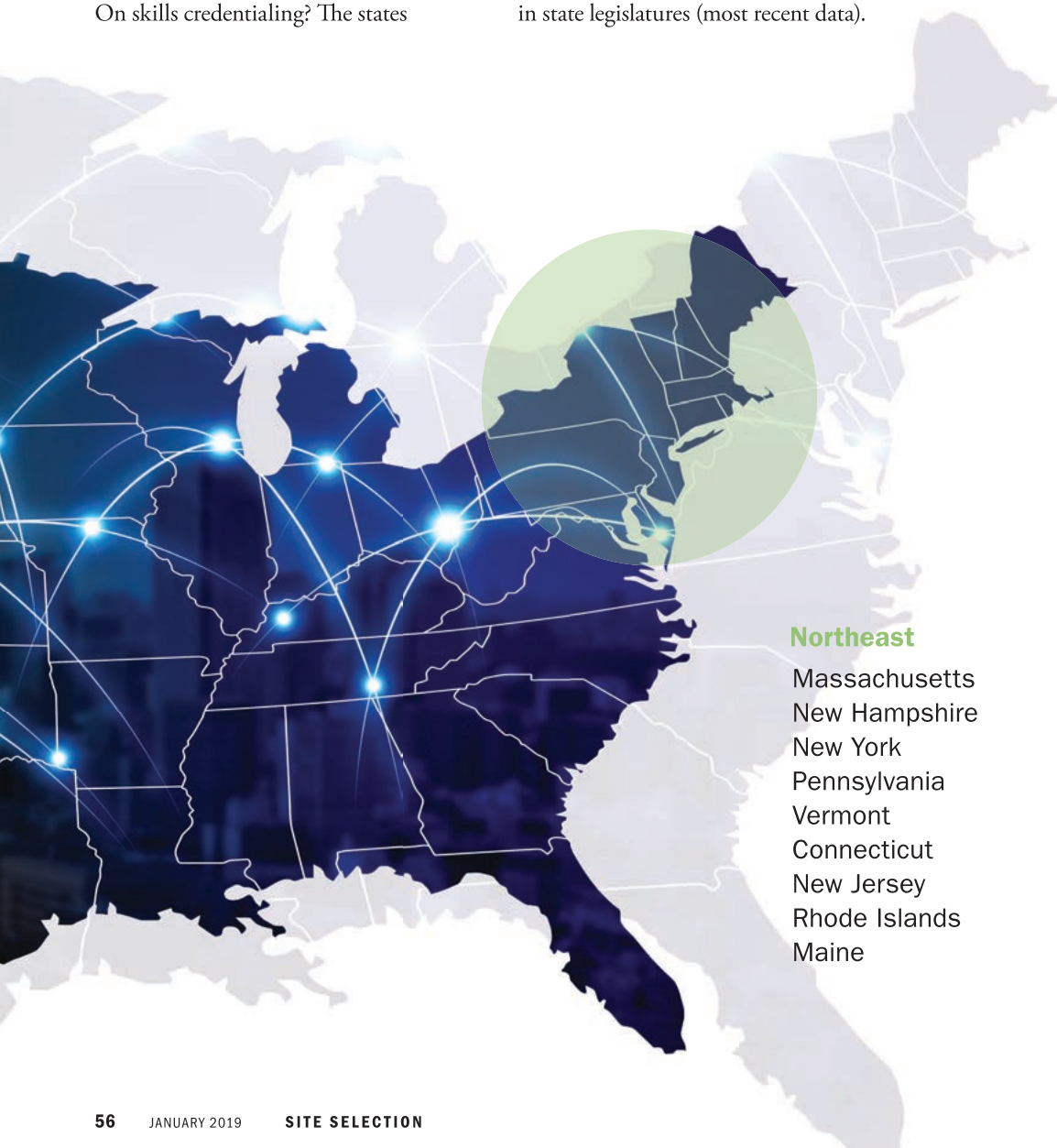


for example, and they have capital investors kicking the tires of their state to assess labor and skills supply in case their business model requires a new location there.

Rather than rank specific state workforce training programs or STEM initiatives across the country or even across a region, Site Selection looks regionally at the state contexts in which such programs are applied. Is there a culture of proactivity, a leader-of-the-pack emphasis on getting graduates to work in in-demand industries and occupations? On skills credentialing? The states

with that kind of focus on workforce will be the states with the individually branded programs that work, and that companies notice.

Ranking components here are: (1) CNBC's America's Top States for Business 2018 Workforce and Education sub-ranking; (2) Forbes' Best States for Business 2018 Labor Supply sub-ranking; (3) U.S. News' 2018 Best States for Education rankings; (4) ACT National Career Readiness Certificates (NCRC) Rankings; and (5) average number of workforce development enactments passed in state legislatures (most recent data).



**Northeast**

**2018 2017**

Massachusetts	1	1
New Hampshire	2	2
New York	3	5
Pennsylvania	4	7
Vermont	5	8
Connecticut	T6	3
New Jersey	T6	4
Rhode Islands	8	6
Maine	9	9



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INTERNATIONAL ECONOMIC DEVELOPMENT COUNCIL  
**AEDO**  
Accredited Economic Development Organization

**LED** LOUISIANA ECONOMIC DEVELOPMENT



**East North Central**    **2018**    **2017**

Michigan	1	3
Indiana	T2	4
Wisconsin	T2	2
Ohio	4	5
Illinois	5	1

**Atlantic**    **2018**    **2017**

Virginia	1	1
Georgia	2	3
North Carolina	3	4
Florida	4	5
Maryland	5	2
South Carolina	6	7
Delaware	7	6
West Virginia	8	8

**South Central**    **2018**    **2017**

Tennessee	1	3
Oklahoma	2	2
Alabama	T3	7
Kentucky	T3	5
Texas	T3	1
Arkansas	6	4
Louisiana	7	6
Mississippi	8	8



**Mountain**

**2018 2017**

Colorado	1	1
Utah	2	2
Idaho	3	6
Arizona	4	3
Nevada	T5	8
Wyoming	T5	4
New Mexico	7	7
Montana	8	5

**Pacific**

**2018 2017**

Oregon	1	3
Washington	2	2
California	3	1
Hawaii	4	4
Alaska	5	5

**West North Central**

**2018 2017**

Iowa	1	1
Minnesota	2	3
Nebraska	3	5
South Dakota	4	7
North Dakota	5	6
Missouri	6	4
Kansas	7	2

# INDUSTRY 4.0 AND THE FUTURE OF WORK

By *DEBRA LYONS*  
*editor@siteselection.com*

**D**id you know we are in the fourth Industrial Revolution? Somewhere around 2013, we moved from industrial systems driven by computers and automation to cyber-physical systems defined by artificial intelligence, miniaturized high-speed computing and big data all wrapped in a wireless networking cloud interfacing with a geophysical world. A simple example is the automated control of smart appliances networked to power companies to create greater energy efficiencies. A manufacturing example is smart factories automatically adjusting production to

improve efficiencies, provide greater customization and reduce operating cost while mitigating negative environmental impact.

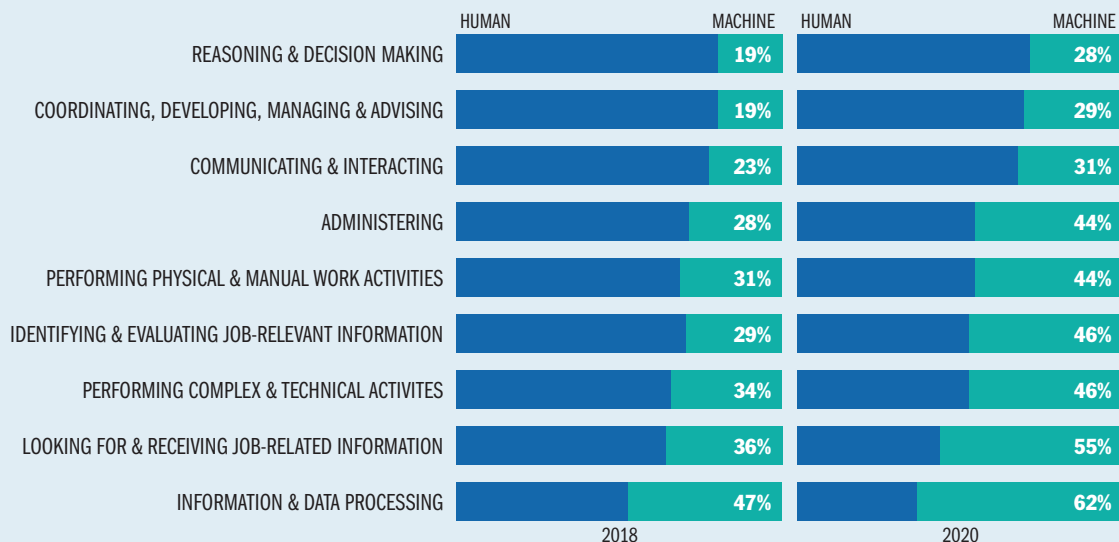
The hottest topic right now in the workforce development world is the future of work. How will jobs be impacted by the high-speed pace of technology? And how will we prepare this future workforce?

Until recently, future-of-work discussions revolved around artificial intelligence replacing humans at work. But if that were the case, why are we still seeing a skills gap predicted well into the future? New thinking on this topic now shows that jobs are

not necessarily disappearing — but they are being augmented by technology. This thinking is putting a new lens on talent preparation.

Survey data recently published by the World Economic Forum shows that many job skills will be augmented by technology in the next five years — but to varying degrees. Skills like reasoning and decision-making; coordinating, developing, managing and advising; and communicating and interacting will be augmented by technology — but to a much lower degree than job skills like information and data processing.

## RATIO OF HUMAN-MACHINE WORKING HOURS, 2018 VS. 2022 (PROJECTED)



SOURCE: FUTURE OF JOBS SURVEY 2018, WORLD ECONOMIC FORUM



The impact of Industry 4.0 is shifting the type and priority of job skills valued by employers in the next five years. Industry leaders are citing analytical thinking, innovation, active learning, technical design and systems analysis as in-demand skills.

Community preparation should include a strategic workforce development plan that addresses the impact of Industry 4.0 on jobs with a focus on developing problem-solving skills, digital acumen, systems learning, leadership skills and life-long learning proficiency. With workforce demographics that show as many workers will be over 40 as under 40 continuing well into the future, retraining of the current workforce should also be a part of the plan. And the measures of success must be able to affirm that the workforce has these skills and is prepared to fill these future jobs. Is your community ready?



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## GREENWOOD, SC: PERFECTLY SITUATED TO GROW YOUR WORKFORCE

When it comes to workforce Greenwood County, South Carolina is ready for your business. Beginning in early high school, we have The Greenwood Business & Industry Showcase to help youth **choose manufacturing** for their future careers. Then students have The Greenwood Edge program that enables them to earn a **Manufacturing Production Technician Certificate** through Piedmont Technical College in high school. Finally, all high school graduates have The Greenwood Promise which provides a **tuition-free associate's degree** from Piedmont Technical College.



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Photo: Getty Images

# You Are Cleared to Land

Where mobility assets on the ground add lift to R&D operations.

**T**he only location better suited for automotive research and development than Southeast Michigan, where the bulk of such work already takes place, is also in Southeast Michigan — in the Detroit Region Aerotropolis, specifically. The 6,000-acre tract is home to two airports — Detroit Metropolitan, a Delta Airlines global hub, and Willow Run, serving cargo, general aviation and charters. The Aerotropolis public-private partnership does more than cater to aviation-related services. It connects potential investors in most any industry with local officials — township, county and state — and to most other resources that can facilitate a new project.

Proximity to the airports, several Interstates and the busiest U.S.-Canada border crossing plus five Class A rail lines make the Detroit Region Aerotropolis ideal for logistics operations. It's part of the Greater Detroit Free Trade Zone, too. To that point, Penske Logistics occupies a 600,000-square-foot warehouse and food grade distribution center. Amazon operates an 855,000-square-foot, 1,500-person fulfillment center — its first Amazon Robotics center in the Detroit area.

The Aerotropolis is also the location of the American Center for Mobility (ACM), adjacent to Willow Run Airport in Washtenaw County. General Motors operated a powertrain plant at the site until 2010. Today, it's a non-profit

by MARK AREND  
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testing, education and product development facility for future mobility, complete with a 2.5-mile highway loop, 700-foot curved tunnel, 1.5-mile urban road, roundabout, garages and other amenities with which to test vehicles and devices and advance the mobility industry.

ACM, one of 10 U.S. DOT designated Automated Vehicle Proving Grounds in the U.S., will only make Southeastern Michigan and the Aerotropolis region more competitive as mobility R&D accelerates in the coming years. It's working already. Subaru Research and Development is building a new North American Technical Center in the Aerotropolis, which eventually will employ approximately 100 research specialists and engineers. Move in is scheduled for December 2019.

The Aerotropolis location keeps in place Subaru's proximity to the EPA in Ann Arbor, and the Van Buren Township and state of Michigan were proactive in bringing forward incentives and location options from the outset. The automaker learned of sites, including the one it's on, before they were even on the market.

## Where the Deals Get Done

In addition to the Subaru R&D Center, Piston Automotive is establishing a new battery-casings manufacturing operation in Van Buren. But the Aerotropolis has plenty of room for more investment.



“Moving forward, there is a lot of opportunity in our region,” says Ron Akers, Van Buren’s director of economic development. “Between the two airports and other transportation amenities, the Aerotropolis’s role in marketing our region is very important. Michigan is a complex political geography, so an entity that makes sure the right people are in the room at the same time is a huge positive for the site selectors and companies and for the communities as well. It helps make sure that the deals get done.”

Why did Piston Automotive pick Van Buren? Proximity to a key client was at the top of the list.

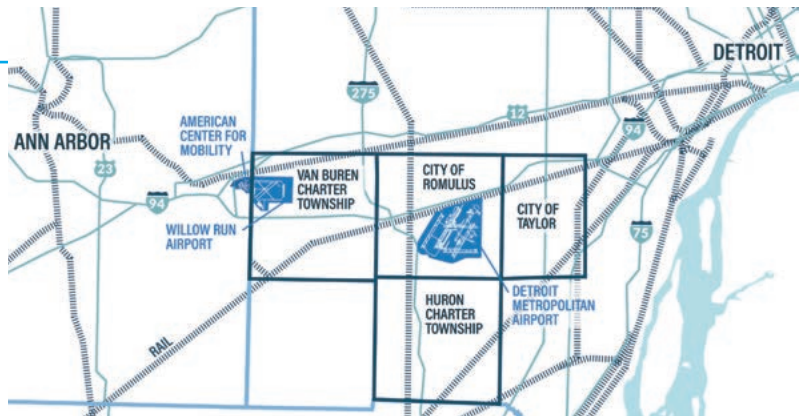
“In Van Buren, we will be building battery modules for two future Ford vehicles,” says Dave Chon, vice president of sales and marketing. “We looked for an available building that had the size and space to handle these programs as well as proximity to Ford.”

Another recent investment in the Aerotropolis will take advantage of its logistics assets. Illinois-based Medline Industries, a leading producer of medical supplies, plans to lease a 420,000-square-foot facility in Romulus, investing \$5.9 million and creating 75 jobs, with the potential to reach \$13 million in total investment over five years.

“The Detroit area has been home to Medline branch operations for over 10 years,” says Dmitry Dukhan, Medline’s vice president of real estate, facilities, supply chain optimization. “We are very excited about this opportunity to grow and share our success with the community, especially in the Aerotropolis region. Its investments in infrastructure, pursuit of growth opportunities and pro-business environment are very attractive to Medline Industries.”

Tim Keyes, director of economic development for Romulus, welcomes Medline, Amazon, Mopar, Penske and all investors in Romulus and in the Aerotropolis. The Subaru project, he says, gets directly at the mission regional leaders have in mind for the Aerotropolis. “It’s a project that is symbiotic with the American Center for Mobility and is tied to automotive, advanced manufacturing and research and development,” he points out. Investors in advanced manufacturing and logistics facilities will find much of the available acreage in the Aerotropolis ideal for their needs, he adds.

“ACM will be one of the largest testing grounds for autonomous vehicles in the country,” says Wayne County Assistant County Executive Khalil Rahal. “The Subaru project is exactly what the investment in ACM is supposed to spur, and



this is evidence that it’s working. ACM is a clear-cut advantage the Aerotropolis has over other sites in the country. The airports are yet another means of travel, of mobility, and they also have plenty of capacity. The greater we can invest in the educational resources needed to create and train the best talent, especially given their proximity to these mobility assets, the greater ability we will have to retain the talent we have and to stay competitive in this arena.” ▼

The American Center for Mobility is a magnet for automotive R&D work.  
Photo courtesy of ACM



*This Investment Profile was prepared under the auspices of Detroit Region Aerotropolis. For more information, call 734-992-2286 or go to [www.DetroitAero.org](http://www.DetroitAero.org).*



Look beyond the conflict headlines, and there's real economic growth under way.

by ADAM JONES-KELLEY  
editor@siteselection.com

A region too often stereotyped as merely exporters of oil and strife is producing economic wins at an historic pace. So let's cut through the hyperbole and explore the wins being notched in this critical region of the world.

As this magazine's parent company, Conway, Inc., recently highlighted in the World's Most

Competitive Cities Report, nine Middle East cities from four countries (the United Arab Emirates, Bahrain, Israel and Saudi Arabia) ranked among the world's most competitive in nine key industry sectors.

Dubai and Abu Dhabi reigned supreme, with each placing in an astonishing seven of 12 potential categories, data backed by the World



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Economic Forum's 2018 Global Competitiveness Report, which ranked the UAE 17th in the world and tops in the region. Qatar, Saudi Arabia, Bahrain and Kuwait round out the top five from the region (see chart below).

The report cited a series of reforms aimed at boosting economic growth as being largely responsible for the UAE's strong showing, including new initiatives to waive corporate fines in Dubai and Abu Dhabi, and a law which took effect in late 2018 allowing 100-percent foreign ownership of companies in selected sectors.

The UAE's winning ways aren't likely to stop, with investment flowing into key growth industries. In the last two years alone, the UAE has increased equity investment in technology firms from \$100 million to a whopping \$1.7 billion.

### Leaders in Prosperity

Perhaps more impressively, the World Economic Forum ranked the UAE No. 1 in the world in Economic Prosperity and Efficiency of Government Spending, with Saudi Arabia close behind at 7th in the ranking of 136 countries. The UAE also took top spots in sectors in areas dealing with ethics, corruption and public trust in politicians. The World Bank concurs. In the 2018 Arab World Competitiveness Report, the UAE again finished first, with Qatar and Saudi Arabia close behind.

What's fueling all these wins? The World Bank report cited improvements over the last decade in such areas as infrastructure development and technological advancement across the region. The report also found that in recent years, countries in the Gulf Cooperating Council (GCC) have made a concerted effort to support innovation and provide crucial seed funding to startups. For example, Saudi Arabia created a \$1-billion fund to invest in small and medium enterprises, while Bahrain (\$100 million) and Oman (\$200 million) have also launched funds to support startups. In Lebanon, the central bank pledged to invest \$600 million into innovative firms.

Will this continue? Most experts believe it will. The region, which grew 1.1 percent in 2017, is forecast to expand further to 3.6 percent in 2019, according to analysis in the ICAEW/Oxford Economics' Economic Insight Middle East Q1 2018. Growth in the Arabian Gulf, the report notes, will accelerate to 2.4 percent in 2018 and 3.5 percent in 2019, compared with 0.1 percent in 2017.

So. Much. Winning. ▼

Country	Middle East Rank	Global Rank
UAE	1	17
Qatar	2	25
Saudi Arabia	3	30
Bahrain	4	44
Kuwait	5	52
Oman	6	62
Jordan	7	65
Morocco	8	71
Algeria	9	86
Tunisia	10	95
Egypt	11	100
Lebanon	12	105
Yemen	13	137



# Who's In For Blockchain?

**A look at some of the states that are leading the way**

by GARY DAUGHTERS

[gary.daughters@siteselection.com](mailto:gary.daughters@siteselection.com)

**B**lockchain technology, still in its infancy, is touted by supporters as the greatest technological innovation since the advent of the World Wide Web. Just as the internet revolutionized the way that information travels around the globe, blockchain, which some have taken to calling “Web 3.0,” could have a similar impact on the worlds of commerce and finance.

As a “distributed ledger” technology, blockchain creates an automated record of any transaction that multiple users can access without the need for middlemen such as banks, credit card companies or real estate title companies; deals that currently take days to settle can be completed in an instant. Virtually immune to hacking, blockchain also allows documents to be updated and amended without human errors sliding in.

While the breadth of potential applications remains vague, much as in the early days of the internet, one indication of blockchain’s growing clout is the nascent race among state governments to regulate the technology, to attract blockchain-based startups, and to adopt it for the delivery of public services.

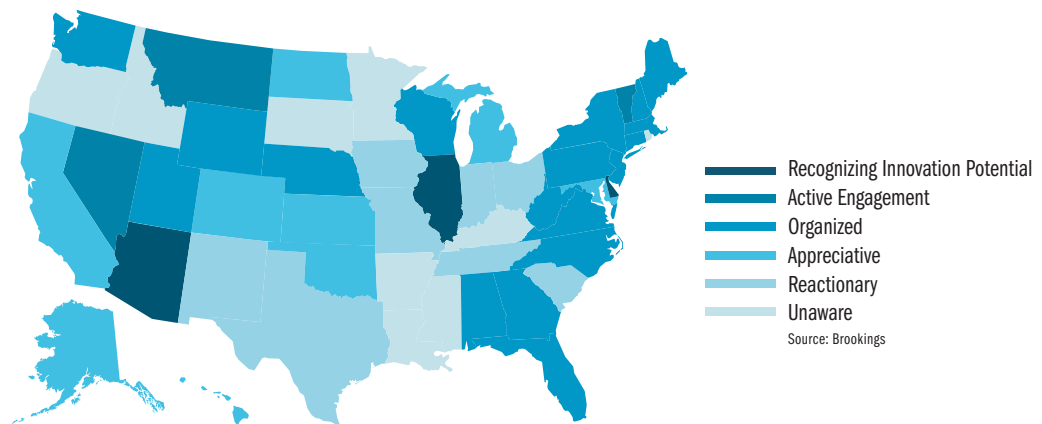
In a study in April, the Brookings Institution classified the states into six categories relative to their levels of engagement with blockchain

technology (see graphic). Eight state governments were ranked as “unaware” of blockchain, having taken no action with respect to it. Eight were classified as “reactionary” for flagging blockchain-related cryptocurrencies as potentially risky. Seven “appreciative” states have made initial attempts to pass blockchain legislation. Seventeen states classified as “organized” have placed legislation on the books. Six “actively engaged” states have begun to apply blockchain to specific government functions; and four states “recognizing innovation potential” have introduced or passed regulations ranging from making blockchain contracts legally valid to allowing residents pay their income tax in cryptocurrencies.

“The level of appetite for blockchain reflects the states’ overall willingness to embrace emerging technologies,” says Kevin Desouza, one of the study’s co-authors. Desouza, professor of Business, Technology and Strategy at QUT Business School at Queensland (Australia) University of Technology, tells Site Selection that states resistant to blockchain may be influenced by “very rigid, dominant technologies where blockchain is a threat to disrupt everything.”

While the picture is rapidly evolving, the efforts of four states stand out:

## State-Level Engagement in Blockchain Technology



### Delaware

Widely regarded as the corporate capital of the United States, Delaware was the first state to the blockchain party, having launched the Delaware Blockchain Initiative (DBI) in 2016 and subsequently legalized the use of blockchain for issuing securities and maintaining state records.

As home to more than a million corporate entities, Delaware receives more than a quarter of its state revenue from its billion-dollar corporate franchise business, and has implemented plans to move much of that business to the blockchain. Officials believe the added security provided by blockchain technology will both bolster the state's edge in corporate registrations and allow it to charge higher fees for filing processes, as blockchain automates much of what companies pay lawyers to handle.

In July, Delaware awarded a contract to IBM to design a prototype for a blockchain-based corporate filing system to determine how the technology can help Delaware-registered entities. As reported by the Delaware News Journal, Deputy Secretary of State Kristopher Knight compared the IBM project to building a model of a skyscraper before construction, saying that "it's meant to show you that this is how we imagine these pieces working together. We're talking about something that's so new, and we don't want anyone who's bidding on this information to get it confused."

### Wyoming

Delaware is being challenged from a corner that might seem unlikely: Wyoming. In a bid to lure blockchain-oriented startups, Wyoming has enacted a series of laws that:

- Exempt blockchain startups from state taxes
- Allow for cryptocurrency trading

- Allow corporations to use blockchain technology to store company records
- Exempt virtual currencies from property taxes.

In addition, Wyoming lawmakers are considering legislation that would allow the creation of one or more "cryptocurrency banks," with the goal of helping blockchain firms to operate in the state. The banks would provide financial services with blockchain-based assets.

### Arizona

Arizona enhanced its reputation among blockchain-friendly states with the adoption of a law to allow corporations to hold and share data on a distributed ledger. The state also recognizes signatures recorded on blockchain as legal documents, meaning individuals can sign records or contracts on blockchain. In August, Arizona became the first state to launch a "regulatory sandbox," allowing businesses across the fintech spectrum to test innovative financial products or services without first obtaining a state license.

### Illinois

The Illinois Blockchain Initiative, launched in 2017, has spurred a series of pilot programs to determine ways to integrate blockchain technology and to lure blockchain startups. The pilots involve using blockchain to secure land title registries, validate academic credentials, register health providers, create a market for energy providers and secure vital records.

The Illinois Blockchain Task Force, composed of state lawmakers and agency representatives, released a 2018 report which found that "blockchain technology and its built-in encryption can facilitate highly-secure methods of interacting with government and keeping paperless records, increasing data accuracy and providing better cybersecurity protections for Illinois residents." ▼





# Will the Appalachian Basin be the World's Next Energy Hub?

by BRYCE CUSTER, SIOR, CCIM  
 editor@conway.com

**E**nergy production in the United States and abroad is changing rapidly. It wasn't long ago that coal-fired plants accounted for more than 50 percent of the electricity in the United States. By 2017, plant retirements had reduced that share to just a little over 30 percent. Predictions are that coal will fall to 15 percent or less of electrical generation by 2040.

According to the Appalachian Regional Commission, over 40 percent of the retired coal-fired capacity can be found in Appalachia.

Along the Ohio River Corridor, we are working with companies repurposing these retired facilities in anticipation of the region becoming the next energy hub. Public and private partnerships are working on site preparation for the potential next wave of energy production along the Ohio River in the Appalachian Basin.

Analysis by Jackie Stewart with Energy in Depth reports that within the Appalachian Basin, record natural gas production is generating over \$25 billion in natural gas electricity generation. The report finds that there are 29 new 475-megawatt (MW) or greater natural gas-fired power plants in various stages of permitting, construction or recently launched operations in Ohio (10), Pennsylvania (16) and West Virginia (3), representing more than 26,000 MW of added electrical capacity. NAI Ohio River Corridor was fortunate to have the opportunity to work with

Advanced Power, NA for their site selection of two facilities in Ohio representing a total of 1,800 MW and total investment of over \$2 billion.

## Fertile Crescent

The tri-state area of the Appalachian Basin shale play includes Ohio, Pennsylvania and West Virginia. This Utica and Marcellus Shale play is also known as Shale Crescent USA. Since horizontal drilling in Pennsylvania began in 2008, there are 10,817 active horizontal wells statewide. In Ohio, there are 2,081 deep horizontal wells with another 376 drilled but not producing currently.

According to the U.S. Energy Information Administration, the Shale Crescent would be the third largest producer of natural gas in the world, after the U.S. as a whole and Russia. Production of natural gas in the Shale Crescent is greater than natural gas production in Texas and other shale plays throughout the United States.

Consider the marketplace for polyethylene, a product of ethane derived from shale drilling. Seventy percent of polyethylene demand in the U.S. and Canada is within a 700-mile radius of the Appalachian Basin. Currently most of the polyethylene is produced in Sarnia, Ontario, or the Gulf Coast.

The Appalachian Basin has the product (natural gas and natural gas liquids, or NGLs) and it's near the market for natural gas co-



# FOUNDATIONAL OPPORTUNITIES

**A**lex Leung and Declan O'Brien of UBS Asset Management – Real Estate & Private Markets in December released the white paper “Investing in U.S. energy infrastructure.” Among their observations was the opportunity to develop export infrastructure near the Marcellus, “where companies are building a new LNG and chemicals base.” Leung, director, Infrastructure Research & Strategy, for UBS, replied to questions from Site Selection. — *Adam Bruns*

## **Site Selection: What are your observations about the level of activity and opportunities for facility or infrastructure development in the Marcellus region’s energy supply chain?**

**Alex Leung:** It’s important to understand that there are two distinct regions there — the Northeast Marcellus has better

## **SS: Which regions do you see setting up best for longer-term industrial development opportunities?**

**Leung:** The Permian basin is the most resilient shale play mainly due to its low operating costs, which gives producers more margin as cushion during periods of commodity price volatility. The Permian boom has led to the development in chemicals, LNG, refining and other industries further downstream in Texas. That said, the Marcellus (in Pennsylvania/Ohio) is also attractive because of its low-cost natural gas, although the chemical and LNG projects further downstream have just begun developing and are still much smaller scale than what is already in Texas.

## **SS: To what extent do you see location opportunities in such areas as energy storage aligning with regions pursuing “smart grid” infrastructure?**



**Location opportunities still come down to how renewable-friendly state policies are, with California being an obvious leader.”**

— *Alex Leung, Director, Infrastructure Research & Strategy, UBS Asset Management, on the economic development potential of energy storage and smart grid technologies*

geology and is closer to demand centers like NYC, but it is highly constrained by infrastructure; the Southwest Marcellus has more pipelines being built and thus more activity, even though it’s further away from key demand markets. Anecdotally though, you won’t hear as much buzz about the level of activity for a shale gas play like the Marcellus, as gas can only be shipped through pipelines, so it’s not as labor-intensive as shale oil plays like the Permian, where roads are crowded with trucks carrying oil (leading to news articles about Permian truck drivers making \$140,000 a year).

**Leung:** Smart grid is still in its infancy, so it’s hard to estimate its direct job-creating power. Like lots of infrastructure projects, many of the jobs are created during the construction phase anyway — once it’s operational, the grid will still be operated by an existing utility, so it won’t necessarily create more jobs. However, the indirect impact is that it could help promote more renewables, which could create new jobs. Location opportunities still come down to how renewable-friendly state policies are, with California being an obvious leader.



generation and plastics. To date, over \$25 billion has been invested in natural gas electrical generation, and Shell Polymers is investing over \$6 billion in a polyethylene facility in Monaca, Pennsylvania. PTTGC has yet to announce a final decision on a \$10 billion-dollar polyethylene facility in Belmont County, Ohio. My guess is that the announcement will come in early 2019 with construction beginning in 2020 in conjunction with completion of the Shell facility toward the end of 2020. Shell is scheduled to begin production in early 2021.

### What Will It Take?

A private/public effort is needed for the Appalachian Basin to be the next energy hub. Will the region be a producer/exporter for the Gulf Coast and the rest of the world, or will the region embrace the natural gas and NGLs from shale and be a producer/consumer, which in turn will generate billions of dollars in investment and countless jobs and opportunities?

Success requires the following:

- Abundant, low-cost feedstock (Natural Gas and NGLs)
- Proximity to customers
- Suitable sites
- Infrastructure (road, rail and river)
- Workforce
- Government (local, state, federal) incentives

Shale Crescent USA in conjunction with IHS Markit has shown a pre-tax cash flow advantage of nearly \$3 billion to build a facility in the Appalachian Basin vs. the Gulf Coast. Market studies have also shown that the Appalachian region is within 70 percent of polymer users, not even considering the number of electricity users of natural gas as a result of coal-fired plant retirements.

At the various conferences I attend, there has been considerable discussion about the lack of suitable sites. I do not believe this to be true. With the decommissioning of power plants, the repurposing of steel plants and some outside-the-box thinking by site planners and engineers, the Appalachian Basin and Ohio River Corridor have plenty of sites for companies to establish success in this region.

One of our greatest challenges is infrastructure. There are currently private and public initiatives to upgrade access from Canton, Ohio (US 30

expansion to the Ohio River), and Columbus, Ohio, to Pittsburgh (US 250 expansion) and the I-68 extension from Morgantown, West Virginia, to Marshall County. All three are critical infrastructure pieces to the overall success of the entire region.

The good news is that we have the Ohio River for movement of goods and modular building of facilities from the Gulf Coast. We have rail and barge infrastructure from the coal electrical plants and the steel mills up and down the Ohio River Corridor.

The Appalachian Basin prides itself on workforce with muscle memory from the times when steel dominated the landscape. The workforce can be trained by the area's excellent trade schools to meet the tasks at hand. Great technical schools, trade schools and universities are all within the Appalachian region. The population exists to put together an exceptional workforce not only to build the facility, but to operate it into the future.

In November, the U.S. Department of Energy and Secretary of Energy Rick Perry released the Ethane Storage and Distribution Hub in the United States report to Congress.

"The establishment of an ethane storage and distribution hub near production from the Marcellus and Utica plays could provide benefits to the broader petrochemical and plastics industries along the lines of supply diversity," said the report. "The present-day geographic concentration along the Gulf Coast of petrochemical infrastructure and supply may pose a strategic risk, where severe weather events limit the availability of key feedstocks." Whereas with development of a hub in Appalachia, "this geographic diversity could provide manufacturers with flexibility and redundancy with regard to where they purchase their feedstock and how it is transported to them."

Could the Appalachian Basin be the next energy hub for the U.S. and the globe? The simple answer is "Yes." ▼

*With over twenty-five years of commercial real estate experience, Bryce Custer, SIOR, CCIM, MRICS, established Ohio River Corridor, LLC, in 2016 as a plastics site selection and commercial real estate services company dba NAI Ohio River Corridor. For information, visit [www.NAIORC.com](http://www.NAIORC.com).*

# Stem Cell Therapies: Made in Canada

by ADAM BRUNS

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If you didn't know any better, you might think every plant or life sciences project in Canada is being driven by cannabis legalization.

But a glance at recent projects across western Canada shows significant projects in these sectors that have nothing to do with CBD or THC, including J.R. Simplot's C\$460-million potato-plant expansion in Portage la Prairie, Manitoba, and German firm Canadian Protein Innovation's C\$100-million, 110-job plant for processing peas in Moose Jaw, Saskatchewan.

Another is a C\$138-million, five-year investment by Canada's largest biotech company. Vancouver-based STEMCELL Technologies last April announced that a C\$45-million joint funding agreement between the governments of Canada and British Columbia would help it build a new advanced manufacturing facility in Burnaby, B.C.

Expected to take five years to complete, the new facility and its nearly 700 new employees will enable STEMCELL to manufacture its products at the higher regulatory compliance standard required to support clinical trials cell therapy, tissue engineering, immunotherapy,

gene therapy and regenerative medicine.

"This funding provides our company with the ability to add hundreds of new, high-paying jobs in BC to support global research leading to the therapies of the future," said Dr. Allen Eaves, founder, president and CEO of STEMCELL Technologies. "It also means that we can contribute to the next generation of landmark treatments and ensures that this coming wave of stem cell therapies is stamped with the Canadian maple leaf. We are proud to be an example of the sort of growth and innovation that can be accomplished when high-tech companies partner with forward-thinking governments."

The company, which celebrated its 25th anniversary in 2018, already employs 1,000 people, serves customers in 80 countries and maintains offices in nine foreign cities, including two each in China and the UK, and its most recently established foreign office in Cambridge, Massachusetts.

"This is the kind of opportunity our government looks for — one that can help make a real difference in the health and quality of life for people here at home and abroad," said British Columbia Minister of Jobs, Trade and Technology the Honorable Bruce Ralston.

"Canadians paved the way in stem cell research," said Canada's Minister of Innovation, Science and Economic Development the Honorable Navdeep Bains, alluding to the discovery of stem cells in Toronto in 1961 by Ontario Cancer Institute biophysicist James Till and his colleague Ernest McCulloch, a cellular biologist.

"Now we're investing in STEMCELL Technologies to help commercialize this success," Bains continued. "The Government of Canada's Strategic Innovation Fund investment will create nearly 700 jobs and advance life-saving innovations that will secure STEMCELL's place in the global supply chain for years to come." ▼



# Saskatchewan - A World Leader in Plant Protein

**S**askatchewan, Canada has built its pulse sector to be the largest in the world. It is one of the leading exporters of lentils and dried peas and a significant producer of chick peas. Saskatchewan is recognized worldwide for the quality of its crops, and in recent years agri-value companies have stepped in to make significant investments into further processing of these crops.

Since it started in 2003, AGT Food and Ingredients has worked with producers and crop development scientists to perfect the types of pulses best suited for processing and exporting. The Regina-based company has grown into the largest exporter of lentils in the world.

In 2013, Agrocrop Processing Ltd. opened what is now a \$20 million high-throughput pulse, grain and oilseed facility centre in Moose Jaw, Saskatchewan. The company is the wholly-owned Canadian subsidiary of Agrocrop International, based in Singapore, which is one of the world's largest pulse traders.

The newest player to Saskatchewan's value-added pulse scene is a company founded by expatriate Canadian and Hollywood movie director James Cameron and his wife Susie Amis Cameron. In 2017, their company Verdient Foods Inc. opened a pea processing plant in the town of Vanscoy, Saskatchewan, which they expect to become the largest organic pea protein plant in North America.

With the world's population forecast to grow to 9.2 billion by 2050, the demand for plant protein is increasing exponentially. These companies have realized that Saskatchewan offers the best value proposition for those wanting to be part of that growth.

"Saskatchewan has the competitive cost environment, stable regulatory regime, accessible government, great workers and work ethic, and an overall culture of innovation. All of these things led us to establish our head office here and 20 manufacturing facilities," says AGT President and Chief Executive Officer Murad Al-Katib.

A key competitive advantage for the province is the strong partnerships between researchers, industry, producers and government to add value to crops produced here.

"Saskatchewan is probably the world's model on collaboration between government and industry," Al-Katib explains. "That's what drew us here, the ability of government and industry to partner to come up with new varieties and technologies to enable the private sector to be agents of commercialization."

Saskatchewan has one of Canada's lowest corporate income tax (CIT) rates for manufacturing and processing operations – at 10 per cent. The **Saskatchewan Value-Added Agriculture Incentive** offers

a corporate income tax rebate of 15 per cent on capital expenditures valued at \$10 million or more for new or expanded agri-value operations. The Saskatchewan Commercial Innovation Incentive can lower the CIT rate to six per cent for corporations that commercialize their qualifying intellectual property in Saskatchewan.

These three companies have seen the opportunity to be part of Saskatchewan's protein highway.

For more information on agri-value investment opportunities in Saskatchewan, contact Chandra Mark, Ministry of Trade and Export Development, [chandra.mark@gov.sk.ca](mailto:chandra.mark@gov.sk.ca).

***"If you want to be international and a leader in value-added agriculture, Saskatchewan is the place to be."***

**Murad Al-Katib**  
AGT President and Chief Executive Officer







**How a quartet of leaders is transforming Pflugerville into an economic juggernaut.**

by **RON STARNER**  
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**A** booming suburb of 65,000 people on the northeast side of Austin, Pflugerville is ascending to new heights thanks to the visionary leadership of four women: City Manager Sereniah Breland, Police Chief Jessica Robledo, Chamber President & CEO Shontel Mays, and Pflugerville CDC Executive Director Amy Madison.

It's one thing for a community to pay lip service

to diversity and inclusion; in this Central Texas community in Travis County, they're embracing it with open arms and showing what a town can do when everyone pulls together.

"This is the only town in Texas where you'll find four women in the top leadership position in these jobs," says Madison, "and we all work together for the common good. The synergy created by this new guard is amazing, and I believe that our collaboration is just getting started."

From left: City Manager Sereniah Breland; Chamber President & CEO Shontel Mays; Pflugerville CDC Executive Director Amy Madison; and Police Chief Jessica Robledo



While these women have only recently taken the helm in Pflugerville, the economic development payoff can be seen all over the community. Additive printing manufacturers like Essentium are choosing to invest heavily in Pflugerville, helping the town earn the nickname of “The 3D City.” Just three months ago, Essentium announced plans to invest at least \$1.5 million and create 170 new jobs when it relocates its headquarters and manufacturing operations from College Station. Essentium joins other 3D printers to form a rapidly growing cluster of advanced and additive manufacturers in Pflugerville.

### The World Discovers Pflugerville

This economic growth is just one reason why Pflugerville ranked as the third-fastest-growing city in the nation last year, according to the U.S. Census Bureau. Money magazine also named Pflugerville the 12th Best Place to Live in America. On average, about 11 people move into Pflugerville each day.

The city’s transformation began when State Highways 45 and 130 were completed and put the town on the map. “It opened up the world to Pflugerville,” said Madison.

Besides having the assets businesses covet — access to major highways and four airports; superior K-12 educational system; low taxes; and a workforce in which two-thirds of adults have a college degree or some college education — Pflugerville goes out of its way to make business expansion easy.

“From an organizational standpoint, we encourage team decision-making that brings all levels of the community together,” says Breland, who has served as city manager of four cities in her career. “We are the only city in Texas to have a city manager and a police chief who are women, and we extend that spirit of diversity and inclusion to everyone in this community.”

Mays, who runs the Pflugerville Chamber of Commerce, concurs, noting that “by having four strong women in this community’s top leadership roles, we’re not just saying that we promote diversity; we’re living it. We know the difference between being invited to have a seat at the table to

just fill a spot and actually being trusted to lead. That happens here.”

She wants new and existing businesses to know that “Pflugerville has developed a true partnership and spirit of collaboration between the city, the chamber and the CDC. We’re always looking for ways to benefit the entire community. By working together, we’re building a stronger business community too.”

## 2017-18: 18 economic development projects

**Absorbed acres: 211.9 acres**

**Square feet under development: 1,878,841**

**Total jobs created: 1,159 FTE / 650 Seasonal**

**Total capital investment: \$178,884,000**

### ‘Think Globally; Lead with Your Heart’

Police Chief Robledo says her own success has motivated her to help others in the community — particularly those who represent minority groups — succeed. “Each time I was promoted throughout my career, there was always someone who took me under their wing and mentored me to ensure my success. There isn’t just one person I can name. I had a village of officers who supported me, and for that I am grateful. No matter the position or industry, we need to teach our employees to think globally and lead with their hearts.”

And the city’s not done growing yet. Pflugerville recently approved up to \$45 million in tax reimbursement for the Pecan District, a mixed-use development that upon buildout in 2028 could have 1,150 residential units, 998,000 square feet of office space, and 228,000 square feet of retail and restaurants.

“Our culture has always been diverse, collaborative and friendly. We work hard to keep it that way,” says Madison. “It takes strong leaders on our council and community boards to manage the kind of growth we’re having in Pflugerville, but we are up to the challenge.” ▼

This Investment Profile was prepared under the auspices of the Pflugerville Community Development Corp. For more information, contact Amy Madison at 512-990-3725 or [amym@pfdevelopment.com](mailto:amym@pfdevelopment.com). On the web, go to [www.pfdevelopment.com](http://www.pfdevelopment.com).



by ADAM BRUNS  
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## EVERY PICTURE TELLS A STORY

**The latest film and TV statistics show which territories are seeing the most ‘Action.’**

**F**rom Belfast to the Big Apple, Bollywood to Burbank, the economic impact of entertainment — like the product itself — is expanding and diversifying into new territory.

Studies performed last year by economists Oliver & Ohlbaum Associates and the British Film Institute peg the global film sector at a robust \$115 billion in market revenues. The film market has a \$45-billion overlap with the TV sector, where the market is more than three times bigger, at \$470 billion. Oliver & Ohlbaum reported in October 2018 that the UK-based film, TV and TV-related industries (the “audio-visual” sector) comprise the largest audio-visual sector in Europe with gross value added (GVA) of £15 billion a year, and GVA per employee significantly

higher than the UK average, for all industries. As of 2014, the UK’s AV sector was 20 percent larger than Germany’s and 50 percent larger than France’s, with GVA growing by 3.1 percent a year since 2010.

On the U.S. side of the pond, data\* shared with Site Selection by the Motion Picture Association of America (MPAA) show where the most productions are shooting and money is flowing — and which locations seem to be getting the most bang for the buck.

California and New York still ranked No. 1 and No. 2, respectively, across most 2016 metrics, from direct and overall jobs to numbers of productions, followed by their closest challenger Georgia. Those states’ performance continued into 2017.

Challengers to the California-New York-

Intel Studios’ geodesic dome structure near Los Angeles International Airport is outfitted with 96 high-resolution 5K cameras.  
Photo courtesy of Intel



Georgia triad in 2016 included Louisiana, Texas and New Mexico. In 2017, however, the hardest charger was Illinois, where the total number of productions doubled to 44 from a paltry 22.

Overall, says the MPAA, the production and distribution of film and TV programs supported 2.1 million jobs and \$139 billion in total wages in 2016. Core jobs in the industry (i.e. producing, marketing, manufacturing, and distributing) accounted for 342,000 of those positions, and paid an average salary of \$90,000. Among other data, the industry:

- Comprised over 93,000 businesses in total, located in every state in the country — 87 percent employ fewer than 10 people.
- Made \$49 billion in payments to over 400,000 local businesses in 2016.
- Generated \$20.6 billion in public revenues in 2016.
- Contributed \$134 billion in sales to the economy. ▼

## Top States by Total Film & TV Productions in 2016-2017

State Name	2016 Direct Jobs	2016 Direct Wages (\$M)	2016-17 Total Film & TV Productions
California	218,452	\$22,240.71	1,383
New York	86,275	\$9,887.33	609
Georgia	28,472	\$2,158.59	266
Texas	40,146	\$1,810.23	81
Louisiana	9,275	\$397.14	74
Illinois	21,006	\$1,092.93	66
New Mexico	4,212	\$218.92	63
Nevada	5,134	\$210.34	51
Massachusetts	10,547	\$595.35	44
Florida	31,245	\$2,028.04	40

source: MPAA

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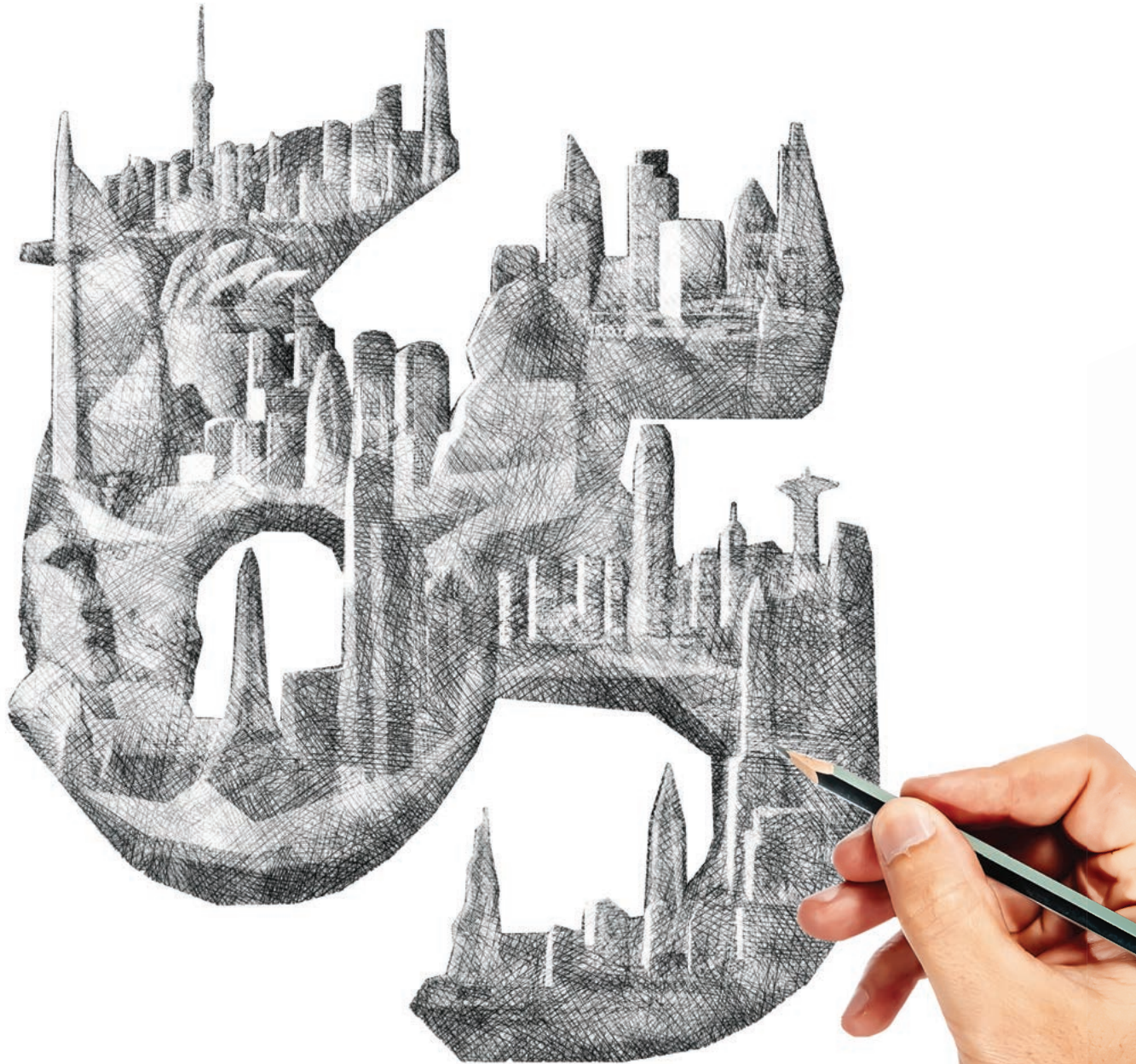
\*Payroll cash rebate applies to developers, engineers, programmers, QA/QC analysts, project managers, and similar roles. Production cash rebate applies to hardware, software, supplies, licenses/permits, and rent.

\*\*Must create a minimum of 5 new jobs, rebate distributed as cash



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# A Commitment to *Connect*

by ADAM JONES-KELLEY  
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**T**hey say the phrase “aging gracefully” is just a nice way of being told you’re slowly looking worse.

We respectfully disagree. At 65, we’ve never looked better.

As the nation’s most trusted corporate expansion and FDI publication reaches an age where we don’t so much blow out our birthday candles as blast ‘em with a fire extinguisher, we thought it worthwhile to reminisce about where we started, highlight some of our successes and chuckle at some of our faceplants. And, more importantly, to thank both the extraordinary men and women who create this best-in-class magazine and the corporate leaders and site consultants who trust us to help guide them in the corporate expansion and relocation process.

Three great magazines were born in 1954: Site Selection, Sports Illustrated and Playboy. We decided early on not to pressure them by competing too directly, and gave up our swimsuit issue and centerfold.

When this magazine was born, the average American could buy a new car for \$1,700, a new house for \$10,000 and go see a movie for 70 cents. The Dow hit a post-Depression high of 381.17. And Betty White started thinking about early retirement.



We've been through a lot over the years, from the booming economy of the '80s to the collapse of 2008. Through it all one thing never changed — our commitment to excellence in journalism — and one thing did — our dogged early determination to produce some of the world's most hideous magazine covers.

Yes, folks, for our first five decades-plus, we used our covers as a repository for head-shots of middle-aged white guys and aerial shots of piles of dirt. For sex-appeal, we sometimes tossed in a little scaffolding or backhoe. That changed in recent years when it occurred to us that a topic as exciting and varied as corporate expansion could look beautiful as well as be beautiful. We hired a top graduate, Sean Scantland, from the famed Atlanta design school The Creative Circus, and tasked him with making our venerated publication look as modern and significant as the field it covers.

It worked. Since then, we've quadrupled the size of our design team and won countless awards for excellence in design. We celebrate these achievements, and embrace our unpolished past, by showcasing the top 10 covers in our history, and worst five, as voted on by our teams across the world.

Site Selection has been the public face of a great company for a very long time. We stand today taller and stronger than we've ever been, precisely because we've been so willing to change, to adapt to the needs of our clients in a fast-changing world, and to never settle for good enough.



The Best  
MAY 2018  
Designed by Sean Scantland



2ND Best  
NOV 2018  
Designed by Negin Momtaz





3RD Best  
JAN 2016  
Designed by Scott Larsen



4TH Best  
SEP 2016  
Designed by Richard Nenoff



5TH Best  
JAN 2018  
Designed by Bob Gravlee



6TH Best  
MAY 2014  
Designed by Sean Scantland



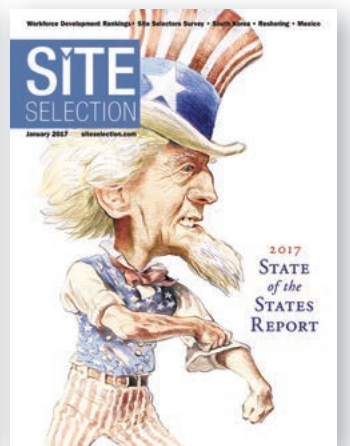
7TH Best  
JUL 2018  
Designed by Sean Scantland



8TH Best  
JUL 2016  
Designed by Richard Nenoff

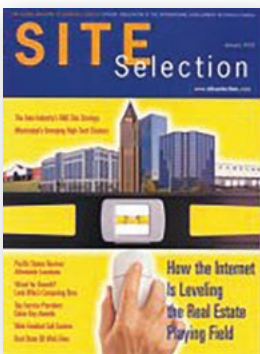


9TH Best  
MAR 2016  
Designed by Tyler Dawson



10TH Best  
JAN 2017  
Designed by Bob Gravlee

## Top 5 Worst Covers



5TH



4TH



3RD



2ND



The Worst

# Meet the Team



**Adam Jones-Kelley**  
President & Publisher

We're better than we've ever been because of the incredible people that make up the Site Selection family. And that's important, because what we do is so critically important.

Wendell Phillips once said, "What gunpowder did for war, the printing press did for the mind." There's an emotional connection to the printed word, especially when, through that word, we are connected to those who create the jobs that put food on the tables of countless families across the world. The connections we make are to those who build the R&D centers creating the technologies of the future. The connections we make are to those who make the expansion decisions so critical in sustaining economies, as evidenced by the fact that Site Selection subscriber companies have invested a staggering \$2.1 trillion in new corporate facilities in the last decade alone. Talk about making a difference!

Each of us at Site Selection contributes some small part to that process. So, as we celebrate our 65th anniversary, we'd like to introduce ourselves — via these original pencil drawings by our very own in-house caricaturist/production coordinator Bob Gravlee — and say thank you. Thank you to our loyal readers, advertisers and supporters for allowing us the privilege of doing this important work, of playing our part in making that difference in the world we've inhabited for six-and-a-half decades.





**Mark Arend**

Vice President of Publications,  
Editor in Chief



**Adam Bruns**

Managing Editor

*Editors*



Original pencil drawings by Bob Gravlee

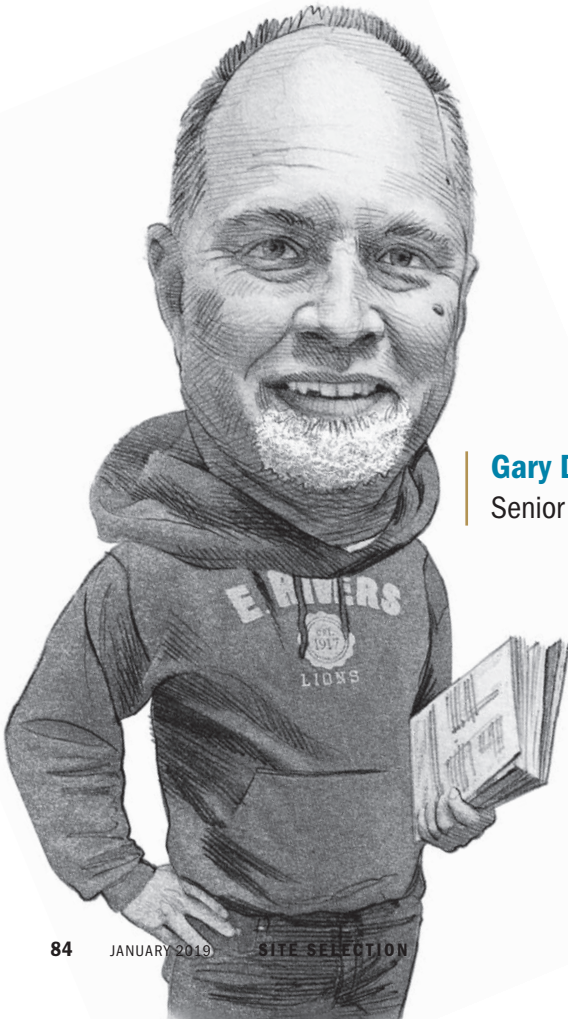
# Editors



**Ron Starner**  
Executive Vice President



**Gary Daughters**  
Senior Editor



**Savannah King**  
Managing Editor,  
Custom Content





# Design Team



**Scott Larsen**  
Art Director



**Bob Gravlee**  
Production Coordinator



**Sean Scantland**  
Lead Designer



**Richard Nenoff**  
Lead Designer



**Negin Montaz**  
Lead Designer

# Design Team

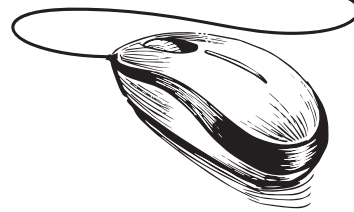


**Whitney Oni**  
Junior Designer





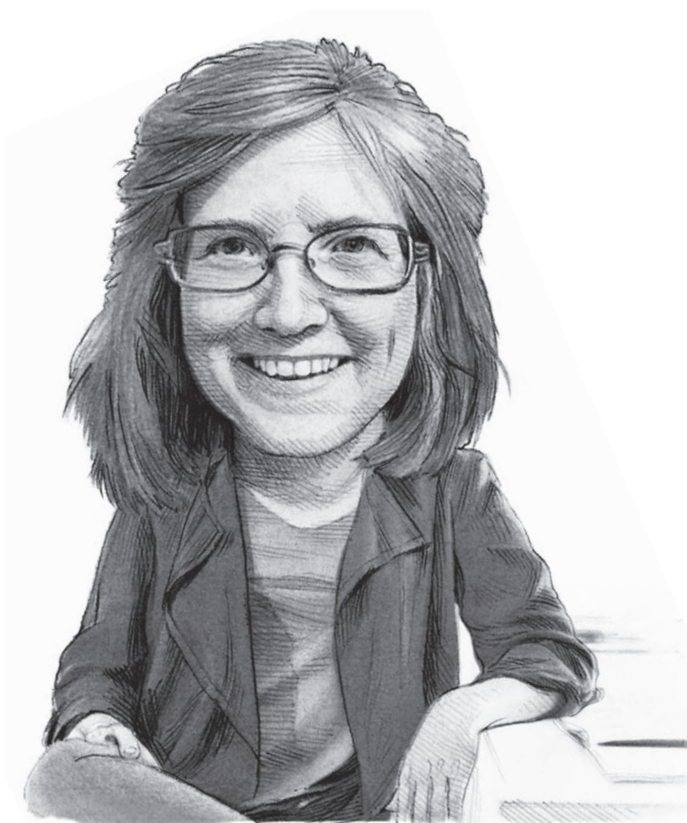
# Web Master



**Ben Yawn**  
Webmaster

**Julie Clarke**  
Circulation Manager

**Karen Medernach**  
Editorial Database Manager





**Charles FitzGibbon**  
Vice President of Sales



**Paul Tarrants**  
Vice President of  
Corporate Development

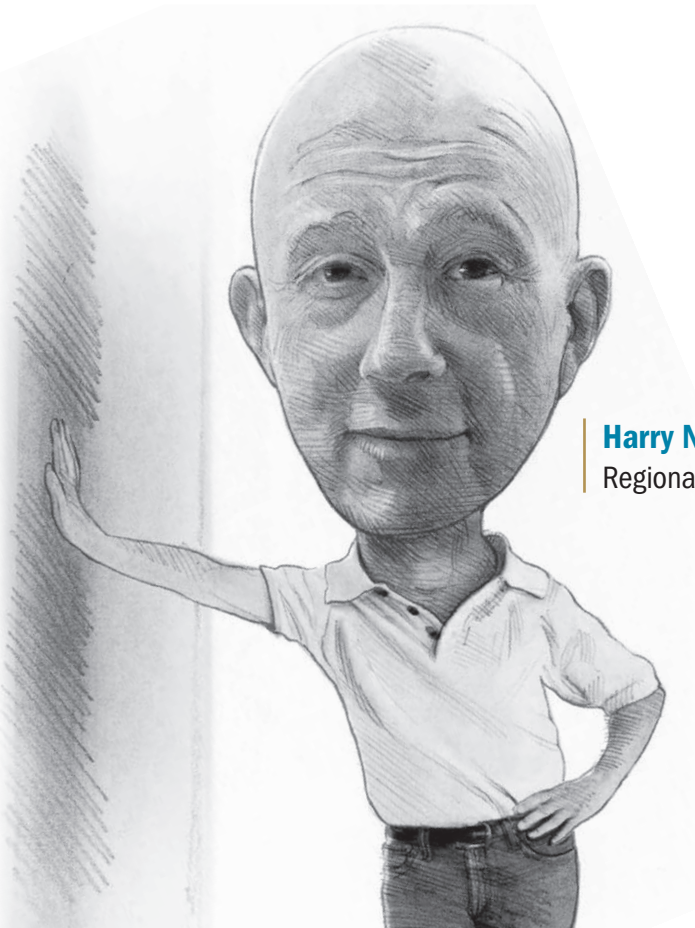


**Mike Glennon**  
Regional Director





**Cathy McFarland**  
Regional Director



**Harry Neill**  
Regional Director



**Paul Newman**  
Regional Director



**Kristin Pickett**  
Regional Director



**Polly Townsend-Rose**  
Global Director

**Margaret Rose**  
Regional Director







**Bobby Pereira**  
Director - Latin America



**Chul Lee**  
Media Representative - Korea



**Drago Napotnik**  
Country Head - China



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Welcome to State of the States 2019, an annual compendium of data that matter to global corporate location decision-makers looking for places to grow in the United States. In addition to containing updated legislative, demographic, economic and education data points, this edition includes the fourth annual installment of Rankings That Matter. This year this six-point scoreboard features the following:



Rank in the Tax Foundation's 2019 State Business Tax Climate Index (Oct. 2018)



Rank in 2017 Higher Education R&D Expenditure (Total in \$000s in parentheses)



Rank in total ACT National Career Readiness Certificates earned per capita among working-age adults, Dec. 2018 (total number in parentheses)



Rank in Workers' Compensation Premium Rate state rankings by the Oregon Department of Consumer and Business Services' IT and Research Division, October 2018



Rank by Lowest Industrial Electric Power Cost (¢/kWh, EIA)



Rank in Fiscal Condition Index (Mercatus Center at George Mason University, July 2018)

Mix and match these data points according to your own organization's site selection priorities, and let the facts guide you toward the best location choice.

*The State of the States report was compiled, edited and designed by Mark Arend, Adam Bruns, Gary Daughters, Karen Medernach, Daniel Boyer and Richard Nenoff.*

**Our annual 50-state report takes you on a guided tour of economic development laws, leaders, policies, indicators and projects from the past year. Use it as you look to update your location portfolio.**



**“Y’all, momentum is on our side, and I want Alabama to be every company’s first choice for their location.”**

— Gov. Kay Ivey, from a speech to the Economic Development Association of Alabama, August 6, 2018

**Alabama Dept. of Commerce**  
401 Adams Avenue,  
6th Floor  
Montgomery, AL 36130  
**Greg Canfield**  
SECRETARY OF COMMERCE  
334-242-0400

**madeinalabama.com**

# Alabama

**Pop. (2018):** 4,968,383

**Median household income:** \$47,060

**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.42%

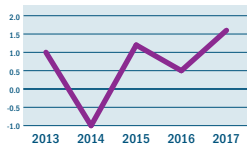
**Median age:** 39

**Right-to-work state:** Yes

## Legislative Update

- Site selectors are exempted from registering as lobbyists with the state Ethics Commission under the Alabama Jobs Enhancement Act, which passed in March. Supporters of the legislation argued that requiring site selectors to register with the government and disclose their confidential clients would chase away potential projects.
- Gov. Ivey signed a bill allowing counties to abate ad valorem taxes for large economic development projects, provided the property is used for a project that qualifies for incentives under the Alabama Jobs Act.
- Lawmakers allocated \$216 million more for spending on education in 2019. The \$6.63 billion education bill is Alabama’s largest education budget in 10 years.

**GDP**  
**27<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$192,663.2**



**39<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -2



**23<sup>rd</sup>**

Higher Ed. R&D Expenditure: \$1,005,133



**11<sup>th</sup>**

Number of NCRs: 163,589 | Percent Improvement 2017-2018: 22.9%



**22<sup>nd</sup>**

2018 Workers' Comp Index Rate: 1.65



**17<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): 6.31



**14<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Mazda Toyota Manufacturing, U.S.A.	Huntsville	Madison	MF/DW	N	Automotive	1,600	4000
Daimler AG	Tuscaloosa	Tuscaloosa	MF	E	Electronics	1,000	
Facebook	Huntsville	Madison	DT	N	IT & Comm.	750	100
Hyundai Motor Co.	Montgomery	Montgomery	MF	N	Automotive	388	50
Amazon.Com	Bessemer	Jefferson	DW	N	Transport & Logistics	325	1500
Airbus Group	Mobile	Mobile	MF	E	Aerospace	300	400
DC Blox	Birmingham	Jefferson	OF/DT	N	IT & Comm.	163	20
Samvardhana Motherson							
Peguform Barcelona Slu	Tuscaloosa	Tuscaloosa	MF	N	Automotive	150	1000
Haier US Appliance Solutions	Decatur	Morgan	MF	E	Electronics	115	255
John Soules Foods	Valley	Chambers	MF	N	Food & Beverage	110	510
Rex Lumber	Troy	Pike	MF	N	Wood Products	110	110
Kimberly-Clark Corp.	Mobile	Mobile	MF	E	Paper, Printing & Packaging	100	

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

With a strong showing in the corporate executive survey portion of Site Selection’s 2018 Top State Business Climate Rankings in November, Alabama recorded an overall 8th-place finish, tying with Indiana, one spot below Virginia.

Alabama exports totaled a record \$21.7 billion in 2017, powered by rising overseas shipments of products such as automobiles, aircraft components, chemicals, paper and minerals.

The University of Alabama’s Culverhouse College of Business projects that Alabama’s economy will grow by approximately 2 percent in 2019, slightly below the 2.2 percent growth in 2018.

Shipt, a Birmingham-based tech firm acquired by Target in 2017, is dramatically expanding its Alabama operations, and plans to hire 881 Birmingham-based workers at an average salary of more than \$48,000.

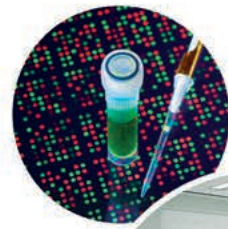




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**“We have 100 million acres of land and very little of it is in private hands. We’ve got to make a decision as a state as to what we want to do with our state land.”**

— Gov.-elect Mike Dunleavy, speaking to reporters in Anchorage, November 8, 2018

**Alaska Dept. of Commerce  
Community & Econ. Dev.**  
550 W 7th Avenue,  
Suite 1770  
Anchorage, AK 99501  
**Brittney Cioni-Haywood**  
DIRECTOR ED  
907-269-8150

**Commerce.alaska.gov**

# Alaska

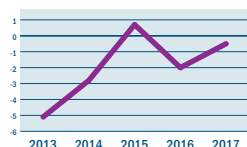
**Pop. (2018):** 750,876  
**Median household income:** \$76,492  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.56%  
**Median age:** 35  
**Right-to-work state:** No

## Legislative Update

- Alaska reduced its crippling \$2.4 billion budget deficit by more than two-thirds by dipping into the state’s oil wealth, something it had never done before. The annual oil dividend paid to every man, woman and child in Alaska accordingly dropped from an estimated \$2,700 to \$1,600.
- Seeking to retain control of a massive natural gas export project, lawmakers removed language from the state budget proposal that would have allowed the state-owned Alaska Gasline Development Corp. to accept outside funds from investors for the proposed Alaska LNG project. The estimated \$43-billion project would include a North Slope gas treatment plant, 807 miles of buried pipeline and a marine export terminal. Under the current plan, AGDC would own the project, purchase gas from North Slope producers and sell it to customers in Asia.

**GDP**  
**45<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$52,291.2**



**2<sup>nd</sup>**  
Business Tax Climate Rank Change 2018-2019: **+1**



**45<sup>th</sup>**  
Higher Ed. R&D Expenditure: **\$176,424**



**37<sup>th</sup>**  
Number of NCRs: **47,128** | Percent Improvement 2017-2018: **2.7%**



**47<sup>th</sup>**  
2018 Workers' Comp Index Rate: **2.51**



**49<sup>th</sup>**  
Lowest Electric Power Cost (cents/kWh): **15.74**



**11<sup>th</sup>**  
Fiscal Condition Index Rank

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**"We're used to attracting companies from California – that's easy. But now we are even taking them from Texas. We're doing something right."**

— Gov. Doug Ducey, State of the State address, January 8, 2018

**Arizona Commerce Authority**  
118 N. 7th Avenue,  
Suite 400  
Phoenix, AZ 85007

**Sandra Watson**  
PRESIDENT/CEO  
602-845-1200

[azcommerce.com](http://azcommerce.com)

# Arizona

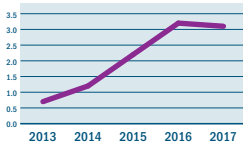
**Pop. (2018):** 7,132,147  
**Median household income:** \$54,974  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 1.37%  
**Median age:** 37  
**Right-to-work state:** Yes

## Legislative Update

- Arizona's 2019 budget includes a \$644 million provision for a 20-percent increase in teacher pay by 2020. Public school teachers went on strike in the spring to protest low pay and cuts to school funding. K-12 education received a one-year increase of \$520 million.
- The state budget provides \$11.5 million for the Arizona Competes fund, which is used to offer cash to companies that move headquarters or significant operations to the state. Gov. Ducey's three-year plan envisions a \$6-million cut to the fund to help fund teacher pay raises. An additional \$300,000 was budgeted for the Commerce Authority to set up a new office in Mexico City.

# GDP 20<sup>th</sup>



**2017 GDP**  
(in millions of current US\$)  
**\$297,161.9**



**27<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -2



**20<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$1,213,469**



**22<sup>nd</sup>**

Number of NCRCs: **8,091** | Percent Improvement 2017-2018: **9.1%**



**11<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.3**



**25<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.94**



**27<sup>th</sup>**

Fiscal Condition Index Rank



## Unprecedented Growth in Arizona Office Market

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(Metro Phoenix 5 year trend)

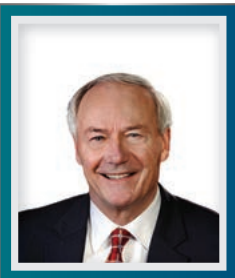
 **92.7%**  
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capture Goodyear's workforce



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— Gov. Asa Hutchinson, State of the State address, February 12, 2018

**Arkansas ED Commission**  
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Suite 400  
Little Rock, AR 72201

**Mike Preston**  
EXECUTIVE DIRECTOR  
1-800-ARKANSAS

**arkansasedc.com**

# Arkansas

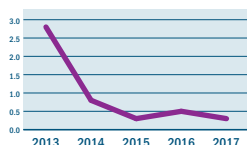
**Pop. (2018):** 3,067,536  
**Median household income:** \$44,518  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.56%  
**Median age:** 39  
**Right-to-work state:** AA/Stable

## Legislative Update

- The Arkansas legislature in 2019 will consider a proposal to reduce the state's top marginal income tax rate from 6.9 percent to 6 percent, representing a potential tax cut of \$180 million.
- Arkansas voters in November approved a constitutional amendment legalizing casinos in four counties. The measure allows the casinos at the Southland dog track in West Memphis and the Oaklawn horse track in Hot Springs, and also legalizes casinos in Pope and Jefferson counties.
- Legislative committees approved the removal of more than 800 regulations deemed outdated and unnecessary. Among those was a rule by the Arkansas Racing Commission declaring that racing fans should not be obnoxious in the stands.

**GDP**  
**34<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$113,951.6**



**46<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -3



**38<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$312,533**



**28<sup>th</sup>**

Number of NCRCs: **75,306** | Percent Improvement 2017-2018: **6.7%**



**3<sup>rd</sup>**

2018 Workers' Comp Index Rate: **0.9**



**6<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **5.43**



**25<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Big River Steel	Osceola	Mississippi	MF/DW	E	Metals	1,200	500
Simmons Prepared Foods	Decatur	Benton	MF	N	Food & Beverage	300	1,500
Aerojet Rocketdyne Holdings	East Camden	Ouachita	MF	E	Metals	50	140
Granges Americas	Newport	Jackson	MF	E	Metals	26	100
Safe Foods Corp.	North Little Rock	Pulaski	MF	N	Life Sciences	15	35
Calstrip Industries	Blytheville	Mississippi	MF	N	Metals	15	45
Zero Mountain	North Little Rock	Pulaski	DW	E	Transport & Logistics	13	22
First Orion Corp.	North Little Rock	Pulaski	HQ	N	Business & Financial Services	10	
Veranda Luxury Pontoons	Malvern	Hot Spring	MF	N	Transport & Logistics	4	80
Select Sands Corp.	Newark	Independence	MF	N	Minerals	4	
Midwest Automation							
Custom Fabrication	Fort Smith	Sebastian	MF/HQ/RD	E	Metals	2	85

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Arkansas' Public School Computer Network has the capacity to provide internet service at a rate of 1 Megabit per second per user to 98 percent of all public schools in the state — more than any other state, according to the 2018 State of the States report from EducationSuperHighway.

Simmons Prepared Foods is investing \$300 million in a new chicken processing plant that will eventually employ about 2,300 people in Bentonville.

Aircraft and spacecraft are among Arkansas' largest exports, accounting for more than \$1.8 billion per year.





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**“This is not just a state of resistance. California is a state of results.”**

— Gov.-elect Gavin Newsom, in his victory speech, November 6, 2018

**Governor's Office of Business & ED**

1325 J Street,  
Suite 1800  
Sacramento, CA 95814

**Panorea Avdis**

DIRECTOR  
877-345-4633

**Business.ca.gov**

# California

**Pop. (2018):** 39,806,791

**Median household income:** \$69,051

**Credit Rating:** AA-/Stable

**Pop. growth 2018–2023:** 0.82%

**Median age:** 36

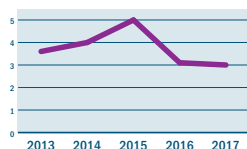
**Right-to-work state:** AA-/Stable

## Legislative Update

- Senate Bill 100, signed into law in September, sets a 2045 target date for 100 percent of California's electricity to come from renewable sources. Interim targets include 50 percent by 2025 and 60 percent by 2030.
- The state in September adopted a ban on new pipelines or other infrastructure in state waters that would support new offshore drilling and development off California's coast. The Trump administration has announced its intention to open 90 percent of federal waters, including waters off the California coast, to drilling leases.
- A measure targeting California's housing crisis will allow for up to 20,000 new housing units – 35 percent of which would be affordable housing – to be built on roughly 250 acres (101 hectares) owned by San Francisco's Bay Area Rapid Transit. The measure gives local municipalities two years to update their zoning plans to accommodate the new housing or risk losing all control over BART-associated projects.

**GDP**

**1<sup>st</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$2,576,222.6**



**49<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -1



Higher Ed. R&D Expenditure: **\$9,225,998**



**19<sup>th</sup>**

Number of NCRCs: **13,228** | Percent Improvement 2017-2018: **11.9%**



**49<sup>th</sup>**

2018 Workers' Comp Index Rate: **2.87**



**47<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **14.61**



**42<sup>nd</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Facebook	Burlingame	San Mateo	OF	N	IT & Comm.	300	
Google	Sunnyvale	Santa Clara	OF	N	IT & Comm.	160	
Rplanet Earth Los Angeles	Vernon	Los Angeles	MF/DW	N	Chemicals & Plastics	100	140
Grifols SA	Emeryville	Alameda	MF/DW	N	Life Sciences	80	
Usf Holding Corp.	Mcclellan	Sacramento	DW	N	Food & Beverage	72	
Nellson NutraceuicalL	Ontario	San Bernardino	MF/RD	N	Food & Beverage	70	
Ove Arup & Partners International	Los Angeles	Los Angeles	OF	N	Machinery, Equip. & Const.	57	150
Robert Bosch Gesellschaft Mit Beschränkter Haftung	Sunnyvale	Santa Clara	RD	N	Automotive	40	
Teradata Corp.	San Diego	San Diego	HQ	N	IT & Comm.	35	
Radiology Partners Holdings	El Segundo	Los Angeles	HQ	N	Life Sciences	33	
Tec Equipment	Fontana	San Bernardino	DW	N	Automotive	30	
Berber Food Manufacturing	Elk Grove	Sacramento	MF	N	Food & Beverage	25	250

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

California's economy produces \$2.5 trillion worth of goods and services annually, \$1 trillion more than the nation's second largest state economy, Texas. The California economy has surpassed that of the United Kingdom.

California's high cost of living, primarily in housing, contributes to the state's 19-percent poverty rate, the highest in the nation, according to the Census Bureau.

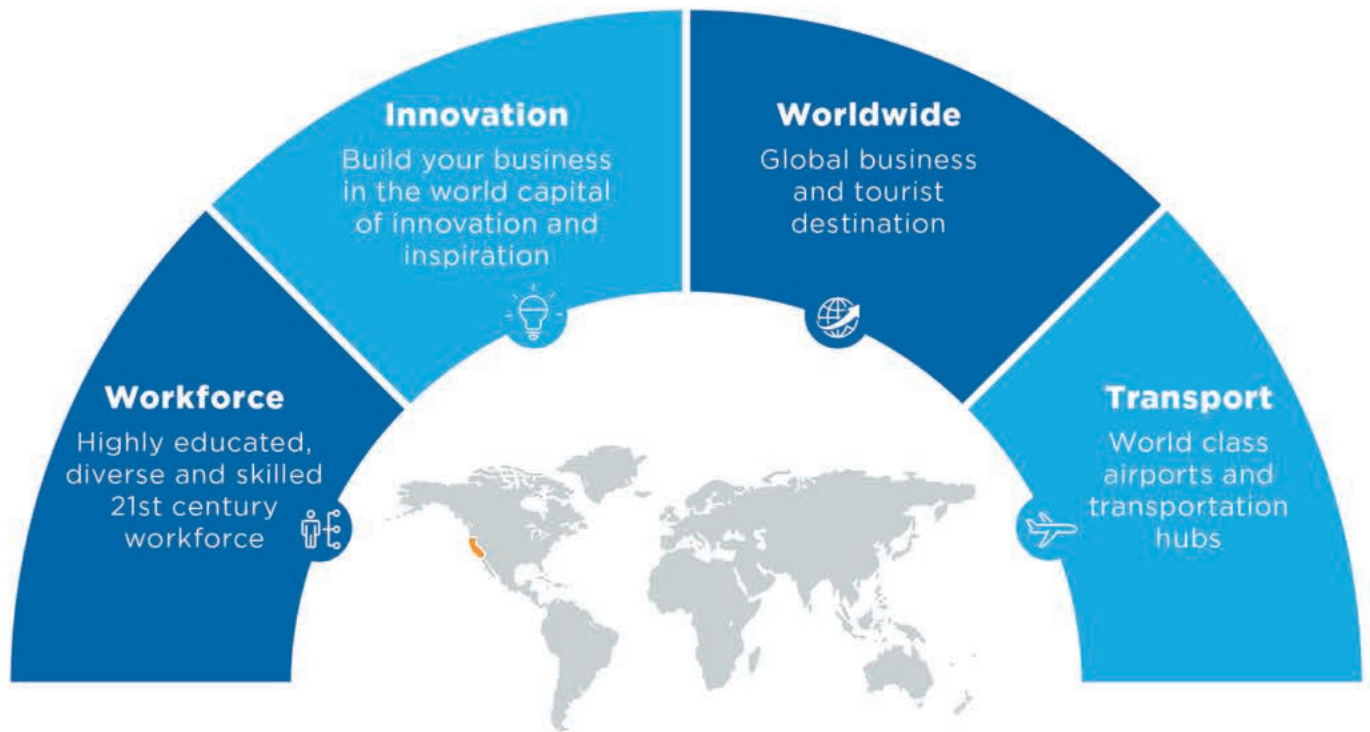
During his cumulative 16 years as California governor, ending in January of 2019, Jerry Brown signed nearly 20,000 bills.

Nearly 90 percent of avocado production in the U.S. takes place in California.



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**“Going after tax expenditures, reducing special interest tax giveaways and loopholes and using the proceeds to reduce the state income tax between three and five percent is what I think we can get to.”**

— Gov.-elect Jared Polis in a November 26 interview with FOX21 in Colorado Springs

**Colorado Office of Econ. Dev. & Intl. Trade**  
1625 Broadway,  
#2700  
Denver, CO 80202  
**Stephanie Copeland**  
EXECUTIVE DIRECTOR  
303-892-3840

[choosecolorado.com](http://choosecolorado.com)

# Colorado

**Pop. (2018):** 5,711,572

**Median household income:** \$65,782

**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 1.53%

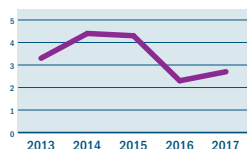
**Median age:** 37

**Right-to-work state:** No

## Legislative Update

- The Colorado legislature approved \$495 million in improvements to the state’s transportation system. Seventy percent of the funds will go to state projects, 15 percent to local projects and the remaining 15 percent to multi-modal projects such as bike lands and public transit. In November, voters rejected an initiative to authorize \$6 billion in bonds to fund future transportation projects.
- A bill signed into law in April commits \$100 million over five years to bring high-speed internet to unserved rural areas.
- Colorado’s state budget, approved in March, increases spending for public schools by \$150 million. Public colleges and universities received a 9-percent boost aimed at limiting tuition hikes. The budget also provided \$225 million to reduce underfunding for the Colorado Public Employees Retirement Association pension fund.

**GDP**  
**16<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$323,274.2**



**18<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: 0



**17<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$1,461,877**



**4<sup>th</sup>**

Number of NCRCs: **9,544** | Percent Improvement 2017-2018: **49.1%**



**16<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.43**



**28<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **7.37**



**28<sup>th</sup>**

Fiscal Condition Index Rank



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**MORE INFO:**  
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[www.RiverfrontColorado.com](http://www.RiverfrontColorado.com)  
970.245.4332  
[info@RiverfrontColorado.com](mailto:info@RiverfrontColorado.com)





**“I’ve got to bring people together to make sure this is a state that hangs together going forward, making decisions we need to get this state growing again.”**

— Gov.-elect Ned Lamont, in his November 7 victory speech

Connecticut Dept. of Econ. & Cmty. Dev.  
450 Columbus Blvd.  
Hartford, CT 06103

Catherine Smith  
COMMISSIONER  
860-500-2300

ct.gov/ecd

# Connecticut

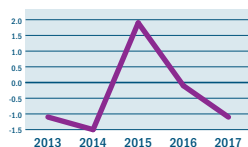
Pop. (2018): 3,631,470  
Median household income: \$75,016  
Credit Rating: A/Stable

Pop. growth 2018–2023: 0.16%  
Median age: 41  
Right-to-work state: No

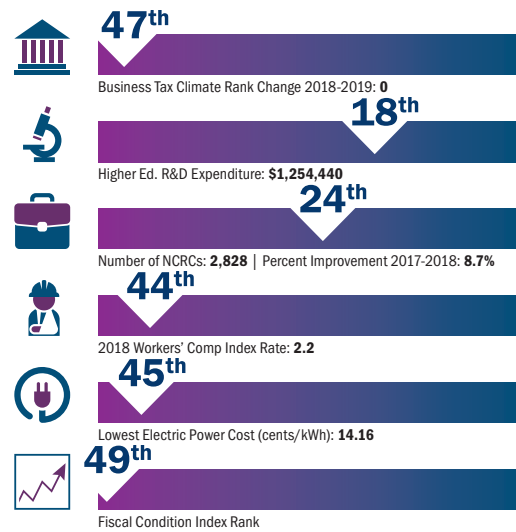
## Legislative Update

- In November, the state made available \$12.2 million from the legal settlement in the Volkswagen emissions cheating scandal to fund 10 clean air projects. Connecticut is one of the first states in the nation to make VW settlement funds available for diesel mitigation projects.
- Connecticut voters approved a constitutional amendment to guarantee that funding set aside for transportation is used exclusively for transportation projects. The “Lockbox Amendment” is to prevent lawmakers from raiding the state’s Special Transportation Fund for other purposes, as they have done in the past.
- A new law contains provisions to reduce greenhouse gas emissions and prepare the state for effects of climate change and sea level rising. The law sets a 2030 target to reduce greenhouse gas emissions by 45 percent from a 2001 baseline. It requires future state projects located in the state’s Coastal Boundary to meet projections for a sea level rise of nearly two feet by 2050.

GDP  
**23<sup>rd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$238,942.6**



**“We really are the most beautiful place on earth. We are of many cultures and faiths, and we live together in greater harmony than any place in the world.”**

— Gov. David Ige, in his State of the State address, January 22

Hawaii Dept. of Business ED & Tourism  
No. 1 Capitol District Building  
250 South Hotel Street  
Honolulu, HI 96813

Luis P. Salaveria  
DIRECTOR  
808-586-2355

dbedt.hawaii.gov

# Hawaii

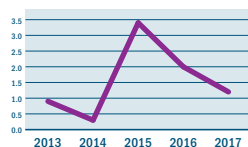
Pop. (2018): 1,459,668  
Median household income: \$76,100  
Credit Rating: AA+/Stable

Pop. growth 2018–2023: 0.79%  
Median age: 39  
Right-to-work state: No

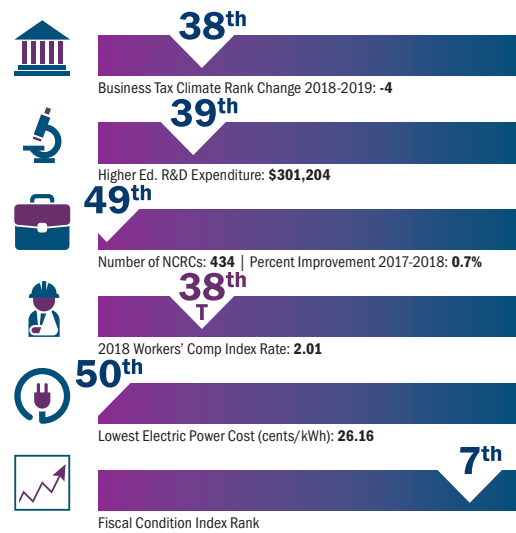
## Legislative Update

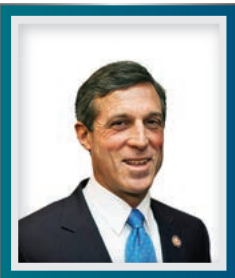
- The state in June approved a \$570-million package of new investments in affordable housing. The law will inject more than \$200 million into two state housing funds and expand a tax exemption for affordable units. State officials project the package could support the construction of more than 25,000 affordable units over the next 12 years.
- Also in June, Hawaii enacted legislation that subjects an out-of-state person who is engaged in business in Hawaii to the state’s general excise tax if the person has a specified amount of income or number of transactions in the state. The thresholds are \$100,000 worth of income and 200 transactions.
- The “Sunscreen Bill,” signed into law in July, bans the sale of sunscreens containing oxybenzone and octinoxate in an effort to protect Hawaii’s coral reefs and marine life.

GDP  
**38<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$79,468.7**





**“Businesses are looking for a good quality of life and fun things to do for their employees. Delaware has a lot to offer, and it’s our job to support and promote the things that make Delaware a great place to live.”**

— Gov. John Carney, in his State of the State speech, January 18, 2018

**Division of Small Business,  
Development & Tourism**

99 Kings Highway  
Dover, DE 19901

Cerron Cade  
DIVISION DIRECTOR  
302-739-4271

[business.delaware.gov](http://business.delaware.gov)

# Delaware

**Pop. (2018):** 988,421

**Median household income:** \$61,260

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 1.16%

**Median age:** 40

**Right-to-work state:** No

## Legislative Update

- In May, Gov. Carney signed the Angel Investor Job Creation and Innovation Act, which provides for a tax credit of up to 25 percent of the investment in a qualified, Delaware-based small business. Qualifying businesses must employ fewer than 25 workers and engage in innovation as part of their primary business activity. Employees’ annual wages must be at least 175 percent of the federal poverty guidelines for a family of four. The minimum investment is \$10,000 for individual investors or \$30,000 for funds.
- In August, Delaware became the 35th state to enable Commercial Property Assessed Clean Energy (C-PACE) financing, which supports the funding of energy efficiency and renewable energy projects on commercial properties. C-PACE loans are funded by private lenders and are paid back through a voluntary assessment on the property’s county tax bill.
- Also in August, Gov. Carney signed legislation creating “Pay for Success” contracts, which encourage private funding of economic development and social programs by offering a return on investment for positive results. A state agency would agree to repay an organization or investor that provides program support or upfront capital to a successful economic development.



**11<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **+5**

**44<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$204,221**

**44<sup>th</sup>**

Number of NCRs: **420** | Percent Improvement 2017-2018: **1.7%**

**46<sup>th</sup>**

2018 Workers’ Comp Index Rate: **2.5**

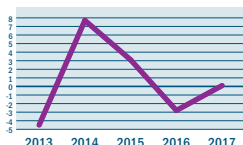
**35<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **7.86**

**44<sup>th</sup>**

Fiscal Condition Index Rank

**GDP**  
**42<sup>nd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$63,890.8**

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Gulfstream Co.	Edgemoor	New Castle	DW	N	Transport & Logistics	410	
Dätwyler Führungs Ag	Middletown	New Castle	MF	N	Chemicals & Plastics	100	120
Dowdupont	Newark	New Castle	MF	E	Chemicals & Plastics	45	
Dot Foods	Bear	New Castle	OF/DW	N	Food & Beverage	36	125
JustfoodfordogS		New Castle	MF/DW	N	Food & Beverage	2	50
Comcast Corp.	Newark	New Castle	CC	N	IT & Comm.		
Perdue Agribusiness	Delmar	Sussex	HQ	N	Food & Beverage		200

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

With 5.7-percent GDP growth, Delaware has the fastest-growing economy in the U.S., according to data posted in March by the Bureau of Economic Analysis. Delaware’s finance industry is expanding at nearly twice the national rate.

Swiss-based Datwyler Sealing Solutions opened a \$100-million manufacturing facility in Middletown that is expected to create 120 jobs. State economic development officials approved grants totaling \$3.1 million to facilitate the project.

Gulfstream, the global port operator, signed an agreement in September to run the Port of Wilmington for the next 50 years. The company plans to spend \$410 million to construct a new container port facility and \$170 million on upgrades to the existing facility.





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**“As governor, I will make sure that Florida remains a low tax state. For those of you in high tax states who may be contemplating investing in Florida, please know that we will remain open for business, and we will save you an awful lot in taxes if you bring your business to Florida.”**

— Gov.-elect Ron DeSantis, in his victory speech on November 6

**Enterprise Florida**  
800 N. Magnolia Avenue,  
#1100  
Orlando, FL 32803

**Peter Antonacci**  
PRESIDENT/CEO  
407-956-5600

**EnterpriseFlorida.com**

# Florida

**Pop. (2018):** 20,875,686

**Median household income:** \$52,098

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 1.41%

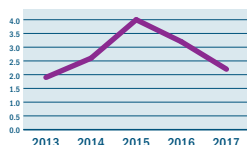
**Median age:** 42

**Right-to-work state:** Yes

## Legislative Update

- A ballot measure that requires a two-thirds vote by the state legislature for any future tax increases was approved by Florida voters in November. Opponents argued unsuccessfully that the measure could tie the state government’s hands in the event of a future economic crisis.
- A law adopted in March mandates increased K-12 instruction in computer science and coding. A bill to allow high school students to replace foreign language courses with computer classes died in the state House.
- A new law will transfer permitting authority for dredging and filling of federal wetland areas from the U.S. Army Corps of Engineers to the Florida Department of Environmental Protection. Supporters say the law will end duplicative state and federal permitting processes, and significantly reduce wait times for permitting decisions.

**GDP**  
**4<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$883,121.6**



Business Tax Climate Rank Change 2018-2019: **0**

**4<sup>th</sup>**



Higher Ed. R&D Expenditure: **\$2,617,802**

**9<sup>th</sup>**



Number of NCRCs: **114,750** | Percent Improvement 2017-2018: **0.3%**

**50<sup>th</sup>**



2018 Workers' Comp Index Rate: **1.81**

**30<sup>th</sup>**



Lowest Electric Power Cost (cents/kWh): **7.61**

**30<sup>th</sup>**



Fiscal Condition Index Rank

**18<sup>th</sup>**

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Nucor Corp.	Frostproof	Polk	MF	N	Metals	240	250
Pratt & Whitney Engine Services	West Palm Beach	Palm Beach	MF	E	Aerospace	100	215
Bombardier Business Aircraft	Miami	Miami-Dade	MF/DW/CC	N	Aerospace	100	
PGA Tour	Ponte Vedra Beach	Saint Johns	HQ	N	Business & Financial Services	86	1,111
Wayfair	Jacksonville	Duval	DW	N	Consumer Products	72	250
Airbus Oneweb Satellites	Cape Canaveral	Brevard	MF	N	IT & Comm.	70	125
Equinix	Miami	Miami-Dade	DT	E	IT & Comm.	60	
Blue Origin	Cape Canaveral	Brevard	DW	N	Aerospace	60	50
Vystar Credit Union	Jacksonville	Duval	HQ	N	Business & Financial Services	59	
Lockheed Martin Corp.	Orlando	Orange	RD	N	Aerospace	50	500
Jinko Solar Co., Ltd.	Jacksonville	Duval	MF	N	Electronics	50	200

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Florida’s economy, which topped \$1 trillion during 2018, is bigger than those of all but 16 countries and is the fourth largest in the nation behind California, Texas and New York.

According to U.S. Census data, Florida’s population grew by 11.6 percent from 2010 to 2017, with 59 Florida cities now home to 50,000 people or more. About 90 percent of new Floridians are migrants from within the United States or abroad.

Blue Origin’s New Glenn rocket, being developed at the Cape Canaveral Air Force Station, is expected to launch in 2020. In October, the company entered into an agreement to build a \$60-million testing and refurbishment facility in Exploration Park, near the Kennedy Space Center.



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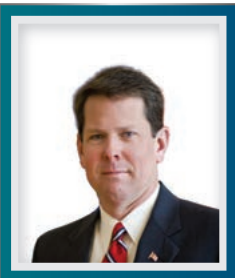


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**“Georgia is and will remain a red state, and we will expose liberal policies that threaten this state’s prosperity and opportunity.”**

— Gov.-elect Brian Kemp in an interview with National Review

**Georgia Dept. of Econ. Dev.**  
Technology Square  
75 Fifth Street N.W.,  
Suite 1200  
Atlanta, GA 30308  
  
Pat Wilson  
COMMISSIONER  
404-962-4000  
  
georgia.org

# Georgia

**Pop. (2018):** 10,517,229

**Median household income:** \$54,785

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 1.10%

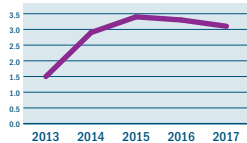
**Median age:** 37

**Right-to-work state:** Yes

## Legislative Update

- Georgia voters approved Amendment 5, removing a requirement that a county school district and a city school district within the county’s boundaries must agree before calling a referendum to raise sales taxes for education. Supporters say the measure is meant to eliminate situations where independent school districts serving a small portion of a county’s students hold the larger districts hostage in hopes of obtaining a larger share of tax proceeds.
- Voters also approved Amendment 2, creating a statewide court specializing in handling complex business disputes. The aim of the measure is to remove certain cases from state and superior court dockets and to put them before judges with special business expertise in order to speed litigation and make Georgia more business-friendly.
- The Georgia General Assembly passed bills to expand mass transit in metro Atlanta, levy sales taxes on online purchases and expand rural internet access. Lawmakers also approved legislation to fully fund K-12 education after more than a decade of cutbacks.

**GDP**  
**9<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$510,822.9**



**33<sup>rd</sup>**

Business Tax Climate Rank Change 2018-2019: -2



**11<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$2,340,410**



**48<sup>th</sup>**

Number of NCRCS: **340,484** | Percent Improvement 2017-2018: **0.8%**



**45<sup>th</sup>**

2018 Workers' Comp Index Rate: **2.27**



**14<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.20**



**38<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
United Parcel Service	Plainfield	Hendricks	DW	N	Package Delivery	260	578
NTK Precision Axle Corp.	Anderson	Madison	MF	N	Steel	100	200
BWI North America	Greenfield	Hancock	MF	N	Auto Parts	82	441
Beijing West Industries Co.	Greenfield	Hancock	MF	N	Auto Parts	80	441
Steel Dynamics	Columbia City	Whitley	MF	E	Steel	78	33
Fukai Toyotetsu Indiana Corp.	Jamestown	Boone	MF	E	Auto Parts	57	103
Fort Wayne Metals Research Products Corp.	Fort Wayne	Allen	OF/MF	E	Steel Wire	51	
Ingram Micro	Jeffersonville	Clark	DW	N	Computer Equipment	40	550
Multimatic	New Haven	Allen	MF	E	Hardware	40	180
Alcoa Warrick	Newburgh	Warrick	MF	E	Aluminum	39	196
Brooks Sports	Whitestown	Boone	DW	N	Retail Merchandise	38	132
Lear Corp.	Hammond	Lake	MF	N	Auto Parts	30	875
Micronutrients USA	New Castle	Henry	MF	E	Pet Food	30	50
Pyrolyx Ag	Terre Haute	Vigo	MF	N	Chemicals	30	55
BorgWarner Pds (Indiana)	Noblesville	Hamilton	MF	E	Auto Parts	28	23

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Georgia, for the sixth consecutive year, finished No. 1 in Site Selection’s State Business Climate Rankings.

The Georgia Ports Authority in December announced plans for a new inland port in Gainesville, just northeast of Atlanta, to provide freight rail service to and from the Port of Savannah. In August, the Authority inaugurated an inland port in Murray County, also in northern Georgia.

Georgia ranks fourth in the nation for the number of individuals employed in the aviation field, and the job growth outlook for the industry exceeds national averages over the next 10 years. New programs such as Chattahoochee Technical College’s new \$35-million Aviation Academy at Silver Comet Field at the Paulding Northwest Atlanta Airport will help fill an aerospace mechanic jobs deficit that in late 2018 stood at about 2,000 positions.



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Calhoun  
Camilla

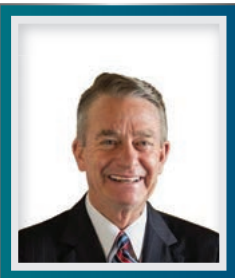
Cartersville  
College Park  
Commerce  
Covington  
Crisp County  
Doerun  
Douglas  
East Point  
Elberton  
Ellaville

Fairburn  
Fitzgerald  
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**“Idaho has been fairly successful, but we have more work to do in taking back the authority that the federal government over the years has taken, whether it’s in the areas of education, transportation, healthcare, public lands management and all the areas of regulation.”**

— Gov.-elect Brad Little, in his victory speech, November 6

**Idaho Dept. of Commerce**  
700 W. State St.  
Boise, ID 83720  
**Megan Ronk**  
DIRECTOR  
208-334-2470

[commerce.idaho.gov](http://commerce.idaho.gov)

# Idaho

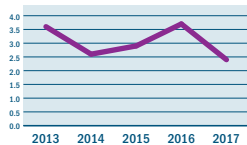
**Pop. (2018):** 1,760,131  
**Median household income:** \$52,294  
**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 1.47%  
**Median age:** 36  
**Right-to-work state:** Yes

## Legislative Update

- In March, out-going Gov. Butch Otter signed cuts to personal and corporate taxes totaling \$201.9 million, described as the largest tax cut in Idaho history. Taxes across all seven personal income brackets as well as the corporate rate were cut by 0.475 percent. Lawmakers also increased the state’s child tax credit from \$130 to \$205.
- Idaho employers will save an estimated \$115 million over the next three years through a law approved January 31 to lower the amount employers pay in unemployment insurance taxes. The 30-percent reduction was made possible by the robust growth of the state reserve fund. The fund is on track to have roughly \$1 billion by 2020.
- Idaho’s annual state budget increased spending on public schools by \$100 million, or 5.9 percent. The state will spend an extra \$10.5 million for classroom technology, \$7.2 million to help districts cover health insurance cost increases, \$4 million to increase discretionary funding by school districts and \$500,000 for the cost of IT staffing in school districts.

**GDP**  
**41<sup>st</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$67,016.2**



**21<sup>st</sup>**

Business Tax Climate Rank Change 2018-2019: **+2**



**46<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$163,093**



**16<sup>th</sup>**

Number of NCRCs: **160** | Percent Improvement 2017-2018: **14.3%**



**30<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.81**



**13<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.12**



**50<sup>th</sup>**

Fiscal Condition Index Rank

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Fabri-Kal  
Fairfield

DOT Foods  
High Desert Milk  
Standridge Color  
Hampton Inn  
WATCO

Burley Development Authority (BDA) contact Doug Manning (208-878-2224)  
[dmanning@burlevidaho.org](mailto:dmanning@burlevidaho.org)



## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Newcold Coöperatief U.A.	Burley	Cassia	DW	N	Transport & Logistics	90	
Micron Technology	Boise	Ada	OF/MF	N	Electronics	32	
Magic Valley Quality Milk Producers	Jerome	Jerome	OF/MF	E	Food & Beverage	20	
Premier Technology	Blackfoot	Bingham	MF	E	Electronics		100
Pape Machinery	Ponderay	Bonner	DW	N	Machinery, Equip. & Const.		
DowDupont	Burley	Cassia	MF	N	Chemicals & Plastics		25

*DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse*

### Did You Know?

Dairy products, not potatoes, are Idaho's No. 1 agricultural export. Idaho is the nation's fourth-largest producer of milk.

In fiscal year 2017, Idaho National Laboratory operations added \$1.94 billion to Idaho's gross domestic product, and the lab spent \$139 million with Idaho businesses.

Idaho voters rejected a hotly-contested initiative to allow historical horse racing – machines that allow people to gamble on recordings of horse races. Proponents of Proposition 1 said it would boost the state's economy and help fund schools; opponents said it would send the state down a path toward legalized casinos.

Thanks to 17 dams on the Snake River and tributaries, hydropower accounts for 50 percent of Idaho Power's generation capacity, vs. 7.5 percent nationally. The company manages over 30,000 acres of wildlife habitat in the Hells Canyon, C.J. Strike and Hagerman areas.

Canada-based McCain Foods USA is investing \$200 million to expand the world's biggest frozen French fry plant in Burley, where the payroll will grow to 710.



# WE HAVE PLENTY OF ROOM TO GROW!

### Idaho Power has the resources to take your business to the next level:

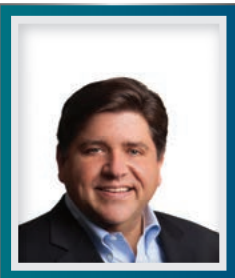
- Our business prices are 40 percent below the national average.
- 50 percent of our energy comes from clean, renewable hydropower.
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**Web:** [idahopower.com/econdev](http://idahopower.com/econdev)



**“My job creation plan includes a focus on attracting and building up small businesses, building infrastructure, such as statewide high-speed broadband internet connectivity, investing in higher education, nurturing our agricultural economy, and jumpstarting manufacturing.”**

— Gov.-elect J.B. Pritzker, Oct. 2018, NBC 5 News, Chicago

**Illinois Dept. of Commerce & Economic Opportunity**  
 100 West Randolph,  
 Suite 3-400  
 Chicago, IL 60601  
 Sean McCarthy  
 DIRECTOR  
 312-814-7179  
 illinoisbiz.biz

# Illinois

**Pop. (2018):** 12,970,153

**Median household income:** \$61,255

**Credit Rating:** BBB-/Stable

**Pop. growth 2018–2023:** 0.10%

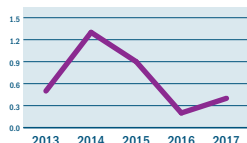
**Median age:** 38

**Right-to-work state:** No

## Legislative Update

- For the first time since 2015, Illinois adopted an on-time budget. It includes \$8.8 billion in spending approval for capital projects such as the construction of water, transportation and housing facilities. Lawmakers also approved \$2.2 billion in spending on infrastructure programs, including \$500 million for an innovation center led by the University of Illinois. K-12 education spending received a boost of \$350 million (5 percent), and early childhood education received an extra \$50 million.
- The state's Entrepreneur Learner's Permit pilot program was expanded to assist any beginning entrepreneurs starting new businesses. The program had previously been limited to "new information services, biotechnology and green technology businesses."
- Lawmakers expanded the existing River Edge Redevelopment Zone Historic Tax Credit. Historic preservation projects along riverfronts statewide that meet one of five targeted criteria and a project readiness test can now apply for a 25-percent state income tax credit for qualified expenditures, up to \$3 million in state credits per project.

**GDP**  
**5<sup>th</sup>**



**2017 GDP**  
 (in millions of current US\$)  
**\$745,292.0**



**36<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -3



**10<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$2,503,276**



**46<sup>th</sup>**

Number of NCRCS: **155,512** | Percent Improvement 2017-2018: **1.4%**



**29<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.8**



**18<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.42**



**21<sup>st</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Coresite Realty Corp.	Chicago	Cook	DT	N	IT & Comm.	210	
World Wide Technology		Saint Clair	DW	N	IT & Comm.	115	500
Harting Inc. Of North America	Elgin	Kane	MF/RD	E	Electronics	100	250
Pinnacle Foods	Saint Elmo	Fayette	DW	N	Food & Beverage	54	100
Kenco Transportation Management	Monee	Will	DW	N	Transport & Logistics	53	
Ihi Turbo America Co.	Shelbyville	Shelby	MF	E	Automotive	40	90
Carl Buddig And Co.	Montgomery	Kane	MF	N	Food & Beverage	30	350
Bystronic Laser Ag	Hoffman Estates	Cook	MF	N	Machinery, Equip. & Const.	30	140
Archer-Daniels-Midland Co.	Effingham	Effingham	MF	E	Food & Beverage	30	
Berner Food & Beverage	Cherry Valley	Winnebago	MF	N	Food & Beverage	25	200
Wieland Metals	Wheeling	Cook	MF	E	Metals	25	65
North American Lighting	Paris	Edgar	MF	E	Automotive	25	50
GC America	Alsip	Cook	MF	E	Life Sciences	25	20

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

With 419 qualifying projects, Illinois placed No. 3 in the 2017 Site Selection Governor's Cup. Chicago-Naperville-Elgin was ranked No. 1 among Site Selection's Top Metros with populations over 1 million.

The population of Illinois declined by 33,703 people in 2017, the state's fourth straight year of population loss. From July 2016 to July 2017, 77 percent of localities in Illinois saw their populations shrink.

Four U.S. presidents – Ronald Reagan, Ulysses S. Grant, Abraham Lincoln and Barack Obama – have called Illinois home. Of the four, Reagan was the only one actually born there, in Tampico, just east of the Quad Cities.





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— Gov. Eric Holcomb, in his State of the State address, January 9

**Indiana Economic Development Corporation**  
 One North Capitol,  
 Suite 700  
 Indianapolis, IN 46204  
**Jim Schellinger**  
 PRESIDENT  
 317-232-8800  
[iedc.in.gov](http://iedc.in.gov)

# Indiana

**Pop. (2018):** 6,762,374

**Median household income:** \$53,531

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 0.52%

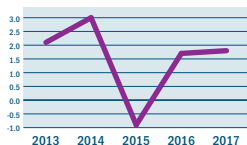
**Median age:** 38

**Right-to-work state:** Yes

## Legislative Update

- Indiana voters approved a balanced budget Amendment to the Indiana Constitution, obligating the General Assembly to spend less money in the state's biennial budget than Indiana expects to collect in tax revenue. The amendment requires that lawmakers fully fund Indiana's pre-paid pension obligations.
- Sunday alcohol sales became legal for the first time in state history when Gov. Holcomb signed Senate Bill 1 on February 28.
- A supplemental education bill signed in March transfers up to \$25 million from the state's tuition reserve fund to the state general fund for 2018. Higher-than-expected enrollment had resulted in a \$16-million education shortfall.

**GDP**  
**18<sup>th</sup>**



**2017 GDP**  
 (in millions of current US\$)  
**\$321,137.5**



**10<sup>th</sup>**  
 Business Tax Climate Rank Change 2018-2019: -1



**16<sup>th</sup>**  
 Higher Ed. R&D Expenditure: \$1,462,495



**32<sup>nd</sup>**  
 Number of NCRCs: **134,147** | Percent Improvement 2017-2018: **4.3%**



**2<sup>nd</sup>**  
 2018 Workers' Comp Index Rate: **0.87**



**26<sup>th</sup>**  
 Lowest Electric Power Cost (cents/kWh): **7.20**



**29<sup>th</sup>**  
 Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Fedex	Indianapolis	Marion	DW	E	Transport & Logistics	1,500	
United States Steel	Gary	Lake	MF	E	Metals	750	
Hanson Lehigh	Mitchell	Lawrence	MF	N	Machinery, Equip. & Const.	600	50
Poet	Shelbyville	Shelby	MF	N	Chemicals & Plastics	160	45
Frito-Lay	Frankfort	Clinton	MF	E	Food & Beverage	159	50
NTN Driveshaft	Columbus	Bartholomew	MF	E	Automotive	90	100
Kar Auction Services	Carmel	Hamilton	HQ	N	Automotive	80	400
Monosol	Lebanon	Boone	MF	N	Chemicals & Plastics	72	89
SMC Corp. Of America	Noblesville	Hamilton	MF/DW/HQ	E	Machinery, Equip. & Const.	67	92
Sazerac Co.	New Albany	Floyd	MF	N	Food & Beverage	66	110
Niagara Bottling	Jeffersonville	Clark	MF	N	Food & Beverage	56	49
Nippon Steel & Sumitomo Metal Corp.	Shelbyville	Shelby	MF	N	Metals	50	70

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Indianapolis International Airport added nonstop service in 2018 to Sarasota, Austin, Philadelphia and Charleston. The airport now offers nonstop flights to 51 destinations in the U.S., Caribbean and Europe.

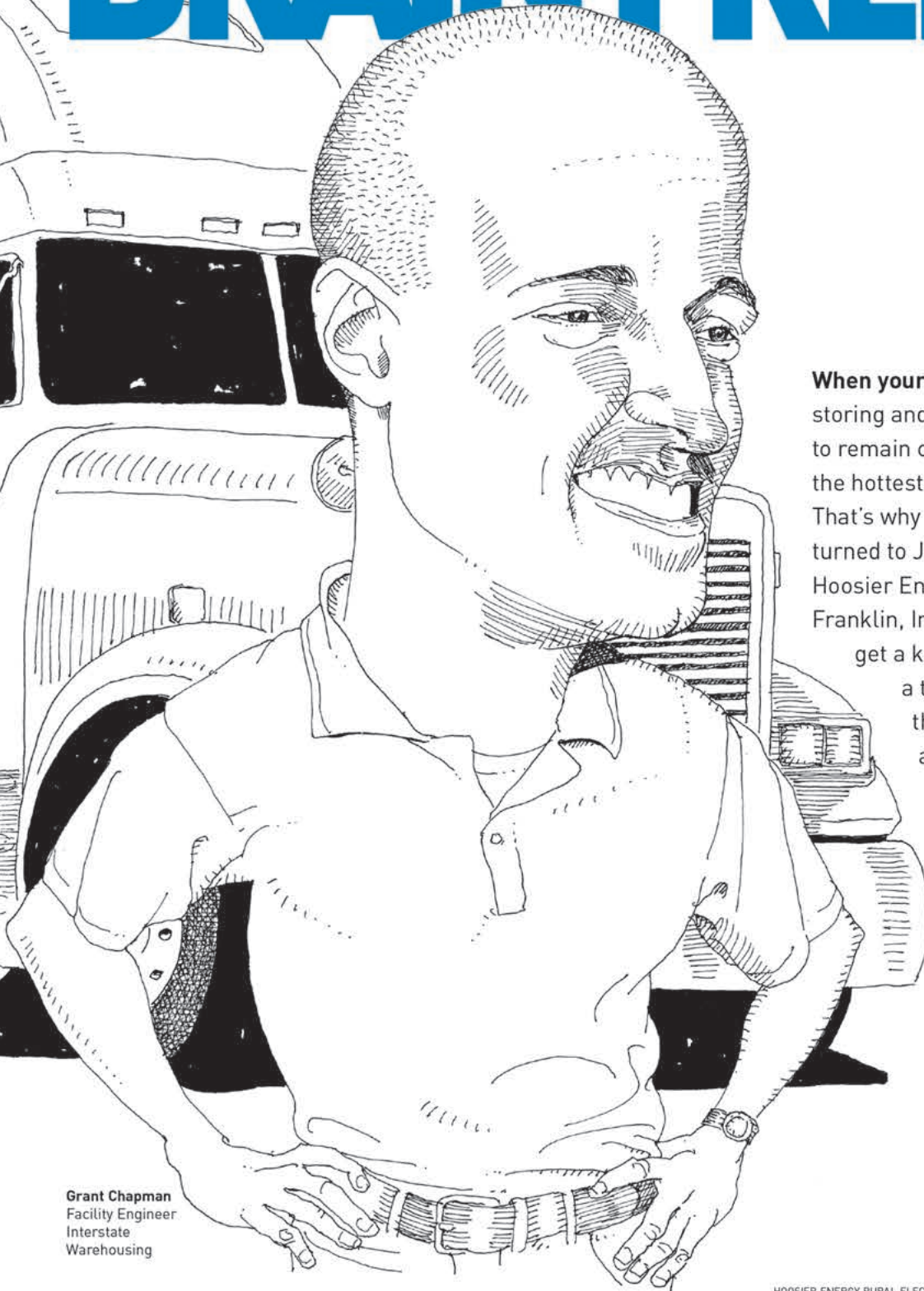
Lehigh Hanson, the Texas-based cement supplier, announced plans for a \$600-million expansion of its cement plant in Mitchell. The plant has been in operation since 1902.

Vice President Mike Pence, Indiana's former governor, hosted "The Mike Pence Show" on radio before being elected to the House of Representatives in 2000.



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**“This bill changes lives by helping Iowans earn credentials that prepare them for rewarding careers in advanced manufacturing, computer science, finance, health care and many other fields. This bill also helps employers hire the skilled workers they need to grow, which means Iowa communities will be even more prosperous.”**

— Gov. Kim Reynolds on April 3rd in Des Moines, signing the Future Ready Iowa bill into law.

**Iowa Economic Development Authority**  
200 E. Grand Ave.  
Des Moines, IA 50309

**Debi Durham**  
EXECUTIVE DIRECTOR  
515-348-6200

[iowaeconomicdevelopment.com](http://iowaeconomicdevelopment.com)

# Iowa

**Pop. (2018):** 3,219,046

**Median household income:** \$56,647

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 0.63%

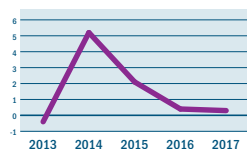
**Median age:** 39

**Right-to-work state:** Yes

## Legislative Update

- Senate File 2417 is a bill relating to state and local revenue and finance. Signed into law in May, it modifies the individual and corporate income taxes, the franchise tax, tax credits, the sales and use taxes and local option sales tax, the hotel and motel excise tax, the automobile rental excise tax and the Iowa Educational Savings Plan Trust.
- House File 2478 is an Act amending the sales tax imposed on certain machinery, equipment, attachments, and replacement parts used in construction.
- Senate File 2353 is an Act relating to the membership and duties of the state and local workforce development boards and related responsibilities of the department of workforce development and including effective date provisions.
- Future Ready Iowa, signed into law April 3rd, is the governor's plan to train Iowans for the jobs of today and tomorrow. The goal of Future Ready Iowa is 70 percent of Iowa workers having education or training beyond high school by 2025. In order to reach that goal, another 127,700 Iowans need to earn post-secondary degrees or other credentials.

**GDP**  
**30<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$169,233.4**



**45<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **+1**



**25<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$830,587**



**15<sup>th</sup>**

Number of NCRCs: **119,363** | Percent Improvement 2017-2018: **14.4%**



**21<sup>st</sup>**

2018 Workers' Comp Index Rate: **1.64**



**29<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **7.59**



**17<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Archer-Daniels-Midland Co.	Clinton	Clinton	MF	E	Food & Beverage	196	
Elite Octane	Atlantic	Cass	MF	N	Chemicals & Plastics	190	45
East Penn Manufacturing Co.	Corydon	Wayne	MF	E	Electronics	171	204
Burke Marketing Corp.	Nevada	Story	MF	E	Food & Beverage	150	210
Michael Foods	Norwalk	Warren	MF	N	Food & Beverage	85	100
Golden Grain Energy, Llc	Mason City	Cerro Gordo	MF	E	Chemicals & Plastics	46	
Tyson Fresh Meats	Perry	Dallas	MF	E	Food & Beverage	44	
Transamerica Corp.	Cedar Rapids	Linn	OF	E	Business & Financial Services	40	
Imt Insurance Co.	West Des Moines	Polk	HQ	N	Business & Financial Services	37	33
Casey'S Retail Co.	Ankeny	Polk	HQ	E	Transport & Logistics	35	101
Deere & Co.	Urbandale	Polk	RD	N	Machinery, Equip. & Const.	33	51
3M Co.	Knoxville	Marion	MF	E	Chemicals & Plastics	32	30

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Products produced from corn in Iowa include fuels, oils, pharmaceuticals, sweeteners, starches & compounds, plastics and carbon dioxide gas.

In 2017, Iowa exported \$170 million in pharmaceutical products to 60 countries. Top export markets were Mexico (\$24.9 million), Canada (\$23.1 million), Japan (\$17.5 million), Spain (\$14.4 million) and Singapore (\$12.7 million). (GTIS, 2018).

Iowa has the 16th highest concentration of biological technicians in the country, with 23 percent more than the national average (Bureau of Labor Statistics, 2017).





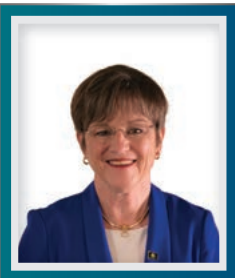
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**“Kansas faces a problem with out-migration – especially with our young people. I want to make Kansas a safe, welcoming place to all people. It’s how we attract new people and businesses to the state and keep them here.”**

— Gov.-elect Laura Kelly, in the University Daily Kansan, Aug. 29 2018

**Kansas Department of Commerce**  
1000 S.W. Jackson St.,  
Suite 100  
Topeka, KS 66612  
**Antonio Soave**  
SECRETARY  
785-296-3481

**Kansascommerce.com**

# Kansas

**Pop. (2018):** 2,970,536  
**Median household income:** \$54,954  
**Credit Rating:** AA-/Stable

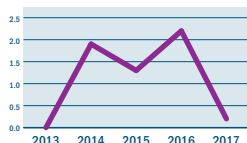
**Pop. growth 2018–2023:** 0.41%  
**Median age:** 37  
**Right-to-work state:** Yes

## Legislative Update

- Gov. Colyer signed education funding bill SB 423 into law. It appropriates
- \$26 million for state foundation aid payments, in addition to already-approved funding.
- \$32.4 million for special education services aid, in addition to already-approved funding.
- \$6 million for supplemental state aid payments, in addition to already-approved funding.
- \$2.8 million for the ACT and ACT WorkKeys assessments. The ACT WorkKeys assessments allow students in grades 9-12 to earn a national career readiness certificate.
- \$500,000 for the mentor teacher program for the 2018-2019 school year.

## GDP

**32<sup>nd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$148,480.9**



**28<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: 0



**31<sup>st</sup>**

Higher Ed. R&D Expenditure: \$577,566



**9<sup>th</sup>**

Number of NCRCs: **34,850** | Percent Improvement 2017-2018: **25.6%**



**6<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.15**



**34<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **7.78**



**46<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Shamrock Trading Corp.	Overland Park	Johnson	OF	N	Transport & Logistics	250	1,000
Icm / Andersons	Colwich	Sedgwick	MF	N	Energy	175	
Peter Kiewit Sons'	Lenexa	Johnson	HQ	N	Machinery, Equip. & Const.	50	
Camso/ Camso Manufacturing USA	Junction City	Geary	MF	N	Machinery, Equip. & Const.	36	35
Geico Corp.	Lenexa	Johnson	OF	N	Business & Financial Services	10	500
Shape Technologies Group							
Parent Holdings.	Baxter Springs	Cherokee	MF	E	Machinery, Equip. & Const.	10	
Cargill.	Emporia	Lyon	DW	E	Food & Beverage	4	
American Construction Metals	Shawnee	Johnson	MF/DW	E	Metals		100
Hopkins Manufacturing Corp.	Edgerton	Johnson	DW	N	Automotive		100
Great Plains Manufacturing	Abilene	Dickinson	MF	N	Machinery, Equip. & Const.		200
Turn 5	Lenexa	Johnson	DW	N	Automotive		100
Overstock.Com	Kansas City	Wyandotte	DW	N	Transport & Logistics		100

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

The top five private industry employers in Kansas are Koch Industries, Wichita, 70,000; Butler Transport, Kansas City, 48,000; Dillons Supermarkets, Hutchinson, 47,000; Synergy Group, Overland Park, 40,000; and YRC Worldwide, Overland Park, 32,000.

The Kansas bioscience industry employs more than 14,000 people across more than 800 establishments, with a heavy concentration of agricultural feedstock and chemicals, and in research, testing and medical labs.

Kansas companies export \$2.7 billion in aerospace products annually. This is 23.8 percent of the state's total exports.



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Nestled in the middle of the U.S., Topeka's strengths as a logistics and distribution hub have already proven to be invaluable to companies such as Mars, Target, Home Depot, Big Heart Pet Brands, Goodyear, and Frito Lay, who all have distribution centers in the community.



TOPEKA, KANSAS  
SHAWNEE COUNTY/USA

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**“The steel and primary metals industries are a driving force behind the commonwealth’s surging economy, and this announcement reflects the distinct advantages we have to offer engineering and manufacturing companies.”**

— Gov. Matt Bevin on September 7th, as Nucor Corporation announced a \$650-million, 70-job expansion at its mill near Ghent.

**Kentucky Cabinet for Economic Development**  
 Old Capitol Annex  
 300 W. Broadway  
 Frankfort, KY - 40601  
 Terry Gill  
 SECRETARY  
 502-564-7670

**Thinkkentucky.com**

# Kentucky

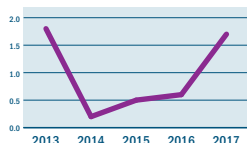
**Pop. (2018):** 4,548,018  
**Median household income:** \$47,571  
**Credit Rating:** A/Stable

**Pop. growth 2018–2023:** 0.51%  
**Median age:** 40  
**Right-to-work state:** Yes

## Legislative Update

- HB 557, the Cabinet for Economic Development Omnibus Amendment Bill, abolishes the Kentucky Environmental Stewardship Act, the state strategic plan for economic development, the Agricultural Warehousing Sites Cleanup Fund and the Signature Project Loan Support Program. It combines the BSSC Skills Training Investment Credit and Grant in Aid programs, and it sunsets the Skills Training Investment Credit program as it currently exists.
- In addition, the bill sunsets the Incentives for Energy Independence Act but rolls the program into the two most popular incentive programs: the Kentucky Business Investment program and the Kentucky Enterprise Initiative Act. It amends the Economic Development Bond program statute to include service and technology and headquarters projects.

**GDP**  
**29<sup>th</sup>**



**2017 GDP**  
 (in millions of current US\$)  
**\$184,682.9**



**23<sup>rd</sup>**

Business Tax Climate Rank Change 2018-2019: **+16**



**30<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$582,404**



**32<sup>nd</sup>**

Number of NCRCs: **156,347** | Percent Improvement 2017-2018: **4.3%**



**18<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.51**



**7<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **5.50**



**37<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Braidy Industries	South Shore	Greenup	MF	N	Metals	1,500	600
Beam Suntory		Bullitt	MF	E	Food & Beverage	585	5
Mark Maker'S Distillery	Loretto	Marion	MF	E	Food & Beverage	495	36
Novelis	Guthrie	Todd	MF	N	Metals	300	125
Global Win Wickliffe	Wickliffe	Ballard	MF	E	Paper, Printing & Packaging	150	500
Century Aluminum Co.	Hawesville	Hancock	MF	E	Metals	116	250
Excel Mining	Pikeville	Pike	MF	E	Energy	74	
Independent Stave Co.	Morehead	Muhlenberg	MF	N	Wood Products	67	220
Veloxint Corp.	Grayson	Carter	MF	N	Metals	60	100
Dae-II Corp.	Murray	Calloway	MF	N	Machinery, Equip. & Const.	50	120
Hydroponic Farms USA	Jackson	Mercer	MF/DW	N	Food & Beverage	45	120

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Kentucky's acreage of planted hemp jumped from 2,300 acres in 2016 to 3,200 in 2017, to 6,700 in 2018. That ranks Kentucky as a national leader, second only to Colorado.

Over the next 10 years, employment in Kentucky is projected to expand by 92,396 jobs. The fastest growing sector in the region is expected to be Healthcare and Social Assistance with a +1.5-percent year-over-year rate of growth.

Kentucky is home to more than 300 food and beverage facilities that provide products and services used globally and employ 50,000 Kentuckians.



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## FIRST, WE CUT RED TAPE. NEXT, WE CUT RED RIBBONS.

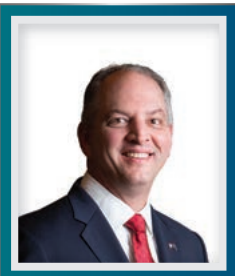
Kentucky is becoming the most pro-business state in America by catering to the needs of the business community. Governor Matt Bevin is cutting red tape, eliminating bureaucracy and fostering an atmosphere of growth never before seen. This has resulted in a record level of investment and new jobs in Kentucky – and a record number of ribbon cuttings!

**Having trouble cutting through the red tape where you are? Come to Kentucky.  
You will be on the cutting edge of success!**

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**“We’re excited to be bringing a company with the global reach of Western Global Airlines to Shreveport, where this project will boost the regional economy and provide compelling new career opportunities for our talented workforce.”**

— Gov. John Bel Edwards on May 8th as Western Global Airlines announced a \$3-million aircraft maintenance facility at Shreveport Regional Airport that will create 170 new jobs

**Louisiana Economic Development**  
617 North Third Street  
Baton Rouge, LA 70802  
  
Don Pierson  
SECRETARY ED  
225-342-3000

**OpportunityLouisiana.com**

# Louisiana

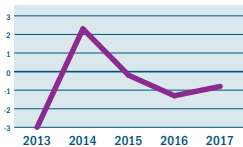
**Pop. (2018):** 4,825,121  
**Median household income:** \$45,256  
**Credit Rating:** AA-/Stable

**Pop. growth 2018–2023:** 0.63%  
**Median age:** 37  
**Right-to-work state:** Yes

## Legislative Update

- Louisiana faced a \$648 million budget gap when temporary taxes expired June 30. The state’s income forecasting panel originally estimated a \$994 million shortfall but reduced the estimate to \$648 million April 12 due to changes expected from federal tax code amendments.
- Gov. Edwards encouraged lawmakers to extend the temporary taxes or establish new revenue sources to avoid cuts in state spending. Lawmakers were unable to agree on tax and spending measures in a special session from February 19 to March 5. In a second special session from May 22 to June 4, legislators approved HB 1, a \$28.5 billion operating budget that fully funded healthcare services, the judiciary, and the legislature but required \$500 million in spending cuts. HB 1 reduced education funding by \$96 million and funded 70 percent of the TOPS state scholarship program for the 2018-2019 school year.
- In a third special session from June 18 to June 24, lawmakers approved a sales tax measure to extend a temporary sales tax rate at 4.45 percent through 2025.

**GDP**  
**24<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$226,612.5**



**44<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **0**



**28<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$691,888**



**5<sup>th</sup>**

Number of NCRCs: **114,342** | Percent Improvement 2017-2018: **31.9%**



**41<sup>st</sup>**

2018 Workers' Comp Index Rate: **2.05**



**3<sup>rd</sup>**

Lowest Electric Power Cost (cents/kWh): **5.12**



**34<sup>th</sup>**

Fiscal Condition Index Rank

*Livingston Parish is located just a short drive from Baton Rouge & New Orleans.*

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- Competitive Land & Incentives
- Build, move, grow or expand
- Great Schools



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SUITE E, LIVINGSTON, LA 70754

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LIVINGSTON ECONOMIC  
DEVELOPMENT COUNCIL

225.686.3982

info@ledc.net

Visit us @ [www.ledc.net](http://www.ledc.net)





**“This legislation unleashes valuable opportunities for investments in the development of revolutionary new technologies and community-based innovation, connecting every region of the commonwealth to the innovation economy.”**

— Gov. Charlie Baker, on signing An Act Relative to Job Creation and Workforce Development, in Boston on August 10th.

Dept. of Housing and Econ. Dev.  
One Ashburton Place,  
Room 2101  
Boston, MA 02108  
Jay Ash  
SECRETARY  
617-788-3610

mass.gov/hed

# Massachusetts

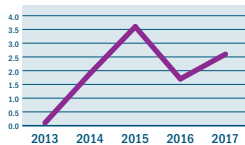
Pop. (2018): 6,925,129  
Median household income: \$77,518  
Credit Rating: AA/Stable

Pop. growth 2018–2023: 0.64%  
Median age: 40  
Right-to-work state: No

## Legislative Update

- On August 10th, Governor Charlie Baker signed economic development legislation into law. An Act Relative to Job Creation and Workforce Development is organized around four main themes: community development, workforce development, innovation, and economic competitiveness. It provides new capital funding for local infrastructure, Brownfields site cleanup, Gateway Cities development, site assembly and site readiness, workforce development, emerging technologies, and community-based innovation.
- The legislation also reforms the state’s smart growth housing toolbox, streamlines the state’s Economic Development Incentive Program, and allows for the expansion of Boston’s Conley cargo terminal. And it updates obsolete liquor laws, ensuring that Massachusetts farmer-wineries will continue to be able to sell their products on their own premises.

GDP  
**10<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$490,174.6**



**29<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -2



**6<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$3,927,934**



**14<sup>th</sup>**

Number of NCRCs: **950** | Percent Improvement 2017-2018: **15.6%**



**13<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.37**



**46<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **14.57**



**32<sup>nd</sup>**

Fiscal Condition Index Rank



**“Missouri is home to over 650 global companies, which supply over 49,000 good paying jobs in our manufacturing sector. By signing this open investment policy, we are reaffirming our commitment to both existing and potential businesses and expanding access to jobs.”**

— Gov. Mike Parson on October 24th on signing Missouri’s first Open Investment Policy statement, welcoming foreign direct investment to the state

Missouri Dept. of Econ. Dev.  
Box 1157  
Jefferson City, MO 65101  
Rob Dixon  
DIRECTOR  
573-751-4770

ded.mo.gov

# Missouri

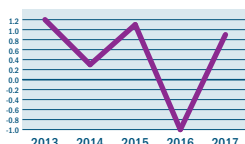
Pop. (2018): 6,223,738  
Median household income: \$52,772  
Credit Rating: AAA/Stable

Pop. growth 2018–2023: 0.47%  
Median age: 39  
Right-to-work state: Yes

## Legislative Update

- The Missouri House of Representatives passed House Bill (HB) 2540, which would reduce the corporate and top individual income tax rates to 5 percent and raise state Department of Motor Vehicle (DMV) fees. The revenue would fund improvements to transportation infrastructure. Governor Mike Parson signed the bill on July 12th.
- A budget bill signed into law June 29th included a \$99 million increase to K-12 education and funding to raise public employee pay

GDP  
**22<sup>nd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$275,571.8**



**14<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **+1**



**22<sup>nd</sup>**

Higher Ed. R&D Expenditure: **\$1,149,385**



**13<sup>th</sup>**

Number of NCRCs: **112,050** | Percent Improvement 2017-2018: **18.8%**



**24<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.68**



**24<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.90**



**16<sup>th</sup>**

Fiscal Condition Index Rank



**“It’s time for a new direction – with bold and forward-looking proposals that will jumpstart economic growth. My economic action plan will accomplish that by supporting small businesses, developing our workforce, welcoming home Mainers to live and work here again, and rebuilding our rural communities.”**

— Gov.-elect Janet Mills, September 18, 2018, presenting her plan for “A New Prosperity” at precision manufacturer Kennebec Technologies in Augusta, Maine

Maine Dept. of Econ. & Community Dev.  
59 State House Station  
Augusta, ME 04333  
**George Gervais**  
COMMISSIONER  
207-624-9800

[maine.gov/decd](http://maine.gov/decd)

# Maine

**Pop. (2018):** 1,376,094

**Median household income:** \$53,150

**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.39%

**Median age:** 45

**Right-to-work state:** No

## Legislative Update

- The Maine legislature did not act on economic development-related measures in 2018. However, the ConnectME Authority developed a Statewide Broadband Action Plan in partnership with the Maine Department of Economic and Community Development (DECD) through collaboration with broadband experts, communities, input from stakeholders and review of models utilized in other states. The Action Plan sets forth initiatives that will ensure Maine’s broadband needs are met within five years of initial funding and envisions meaningful local, state, federal and private-sector investment.
- The ConnectME Authority is a public instrumentality of Maine state government, whose mission is to facilitate the universal availability of broadband to Maine households and businesses. Broadband is a key element to many economic and community development goals including business and workforce attraction.
- A federal omnibus bill that includes \$600 million for rural broadband nationally was recently passed and will be allocated through USDA Rural Development. Maine is prepared to compete for a portion of that funding. Federal money coupled with state and private investment is an aggressive start to getting Maine businesses and residents connected through infrastructure expansion.



**30<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **0**



**48<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$122,740**



**27<sup>th</sup>**

Number of NCRCS: **136** | Percent Improvement 2017-2018: **7.9%**



**32<sup>nd</sup>**

2018 Workers’ Comp Index Rate: **1.84**



**40<sup>th</sup>**

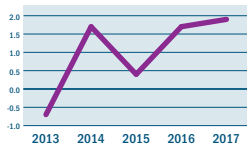
Lowest Electric Power Cost (cents/kWh): **8.58**



**33<sup>rd</sup>**

Fiscal Condition Index Rank

**GDP**  
**43<sup>rd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$55,598.8**

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Nordic Aquafarms As	Belfast	Waldo	MF	N	Food & Beverage	150	60
Idexx Laboratories	Westbrook	Cumberland	HQ/RD	E	Life Sciences	62	600
Lignaterra Global	Millinocket	Penobscot	MF	N	Wood Products	30	100
Tyler Technologies	Yarmouth	Cumberland	OF	E	IT & Comm.	28	
Ready Seafood Co.	Saco	York	MF/DW/RD	N	Food & Beverage	10	40
Katahdin Railcar Services/Central Maine & Quebec Railway US	Milo	Piscataquis	DW	N	Transport & Logistics	7	
Downeast Institute For Applied Marine Research And Education	Beals	Washington	RD	E	Life Sciences	6.6	
T&D Wood Energy	Sanford	York	MF	N	Wood Products	5.7	
Bristol Seafood Holdings	Portland	Cumberland	MF/DW	E	Food & Beverage	5	40
Pineland Farms Dairy Co.	Bangor	Penobscot	MF	E	Food & Beverage		50

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Maine has four intermodal freight facilities in Saco, Portland, Auburn and Waterville.

Dove Tail Bats, in Shirley Mills, supplies all 30 Major League Baseball teams with bats made from native ash and birch.

More than 20 breweries opened in 2017; the industry employs more than 2,100 Mainers.





Lee Speronis, Associate Professor  
Hospitality, Sport and Tourism Management, Husson University  
Chair of Bangor Region Chamber of Commerce

“The experience is **completely modern** and up to date.”

Lee Speronis knows what it takes to create enjoyable travel experiences. The convenience of updated passenger amenities and warm, friendly service at Bangor International Airport combine to make flying simple and enjoyable. Lee says it deserves a grade of A+, and after all, he's the professor. Learn more at [FlyBangor.com](http://FlyBangor.com)



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**“We certainly couldn’t imagine Old Bay [seasoning] being made anywhere else.”**

— Gov. Larry Hogan on October 2 at the grand opening of McCormick & Co.’s new, 350,000-sq.-ft. headquarters in Hunt Valley. The project retains 1,000 jobs in Baltimore County.

**Maryland Department of Commerce**  
401 East Pratt Street  
Baltimore, MD 21202  
R. Michael Gill  
SECRETARY  
410-767-6300

[commerce.maryland.gov](http://commerce.maryland.gov)

# Maryland

**Pop. (2018):** 6,119,186

**Median household income:** \$79,833

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 0.68%

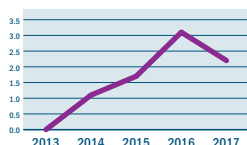
**Median age:** 39

**Right-to-work state:** No

## Legislative Update

- Governor Larry Hogan signed legislation in May that will build on the success of the administration’s More Jobs for Marylanders Act, passed in 2017. The program incentivizes manufacturing companies to create jobs in areas with higher unemployment by providing a tax credit for each new job created. The 2018 legislation expands the program to additional jurisdictions, including Garrett, Caroline, Kent, and Wicomico Counties.
- The Small Business Relief Tax Credit (SB 134) will aid employers in providing benefits to their employees, and the Cybersecurity Incentive Tax Credits (SB 228) will encourage investment in the state’s cybersecurity industry and further solidify Maryland’s position as the cyber capital of America.
- The PRIME Act, which the governor introduced following Montgomery County’s selection as one of 20 potential locations for Amazon’s HQ2, provides \$3 billion in tax credits and exemptions if Amazon had located in Maryland. It would have allowed the company to retain a portion of wages paid to employees, which would otherwise go toward state income taxes.

**GDP**  
**15<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$363,027.9**



**40<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: 0



**5<sup>th</sup>**

Higher Ed. R&D Expenditure: \$4,020,423



**10<sup>th</sup>**

Number of NCRCs: 748 | Percent Improvement 2017-2018: 23.2%



**12<sup>th</sup>**

2018 Workers' Comp Index Rate: 1.33



**36<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): 7.95



**47<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
McCormick & Co.	Hunt Valley	Baltimore	HQ	N	Food & Beverage	170	
Diageo	Arbutus	Baltimore	MF	N	Food & Beverage	90	200
Southwest Airlines Co.	Baltimore	City of Baltimore	DW	N	Transport & Logistics	80	
Emergent Biosolutions	Baltimore	City of Baltimore	MF	E	Life Sciences	50	60
Ring Container Technologies	Hagerstown	Washington	MF	N	Chemicals & Plastics	7	18
Stanley Black & Decker	Towson	Baltimore	OF	N	Metals	2	400
Booz Allen Hamilton Holding Corp.	Bethesda	Montgomery	OF	N	Business & Financial Services	1	
Bank Of America Corp.	Hunt Valley	Baltimore	OF	E	Business & Financial Services		600
Kuehne + Nagel	Perryman	Harford	DW	N	Transport & Logistics		225
Paragon Bioservices		Anne Arundel	MF	N	Life Sciences		200
Navistar Direct Marketing	Frederick	Frederick	OF/MF	N	Business & Financial Services		200
Vitreon America	Baltimore	City of Baltimore	HQ/RD	N	Life Sciences		200
Cybrary	College Park	Prince George's	HQ	N	Business & Financial Services		200

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Johns Hopkins University ranks first among U.S. colleges and universities in total National Institutes of Health awards, including grants and contracts for research, development, training and fellowships (\$651.8 million).

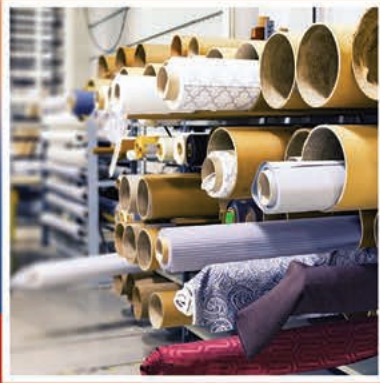
Maryland ranks fifth and is an “Innovation Champion” according to the Consumer Technology Association’s 2018 Innovation Scorecard. The ranking is based on 12 criteria that include sensible tax structures and policies allowing cutting-edge technologies and new business models to flourish, all of which creates high-quality jobs and healthy economic growth.

Maryland is second in the nation with 16 higher education institutions designated by the National Security Agency and Department of Homeland Security as National Centers of Academic Excellence in Cyber Defense education and research.



# CECIL COUNTY, MARYLAND

## *It Just Works!*



Cecil County, Maryland has become one of the top industrial markets on the East Coast. Situated midway between Baltimore and Philadelphia, Cecil County's strategic location offers overnight access to over 90 million people. Cecil County offers your business direct access to I-95, main freight railroad lines, and close proximity to two international airports and two of the country's top 25 ports. Key employers include a host of world-class companies such as Amazon, IKEA, Northrop Grumman, and W.L. Gore. Cecil County has a diverse industry base due to the county's skilled workforce, supply of dynamic industrial sites in Opportunity Zones, and transportation infrastructure. Contact us to find out how we can help your business grow.

**Cecil County – *it Just Works!***



410-996-6292 • [www.cecilbusiness.org](http://www.cecilbusiness.org)



**“You can be both progressive and want to get things done – they’re not mutually exclusive, and that’s what I bring.”**

— Gov.-elect Gretchen Whitmer in a profile by The New York Times, Nov. 8, 2018

**Michigan Economic Development Corporation**  
300 N. Washington Square  
Lansing, Michigan 48913

Jeff Mason  
CEO  
517-241-1400

[Michiganbusiness.org](http://Michiganbusiness.org)

# Michigan

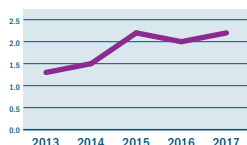
**Pop. (2018):** 10,057,191  
**Median household income:** \$53,680  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.25%  
**Median age:** 40  
**Right-to-work state:** Yes

## Legislative Update

- In June, Gov. Rick Snyder signed into law the framework of the Marshall Plan for Talent. Designed to connect employers with educators to pair students with in-demand careers, the Marshall Plan encourages apprenticeships and mentorships with an educational focus on certifications and occupational licensing. Among other provisions, Senate Bills 941 and 942 will:
  - Set aside \$100 million to prepare students for the 21st century economy, including \$10.5 million for career navigators, who are dedicated to help guide students toward their career and associated academic goals;
  - Let schools change the way they educate students, using a competency-based approach that results in high-demand skills and credentials;
  - Create Marshall Plan Talent Consortiums - groups of educators and employers that partner to change the way students are prepared for careers; and
  - Establish the Innovative Educator Corps, a group of innovative educators nominated by their local schools. These educators will receive stipends from the state and travel around Michigan to share their innovations with others.

**GDP**  
**14<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$458,813.5**



**13<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -1



**8<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$2,662,045**



**45<sup>th</sup>**

Number of NCRCs: **636,275** | Percent Improvement 2017-2018: **1.6%**



**14<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.38**



**26<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **7.20**



**24<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Fiat Chrysler Automobiles Nv	Warren	Macomb	MF	E	Automotive	1,000	2,500
Ford Motor Company	Wayne	Wayne	MF	E	Automotive	850	
Dairy Farmers Of America/Select Milk							
Producers/Glanbia Nutritionals	Saint Johns	Clinton	MF	N	Food & Beverage	470	250
Pfizer	Portage	Kalamazoo	MF	N	Life Sciences	465	450
Flex-N-Gate Corp.	Detroit	Wayne	MF	N	Automotive	160	230
Amazon.Com	Gaines Charter Township	Kent	DW	N	Electronics	150	1,000
Gerdau Macsteel	Monroe	Monroe	MF	E	Metals	115	
Stryker Corp.	Portage	Kalamazoo	MF	E	Life Sciences	109	260
Arconic	Whitehall	Muskegon	MF	E	Metals	104	45
Gentex Corp.	Zeeland	Ottawa	DW	E	Consumer Products	100	250
Proliant Dairy	Saint Johns	Clinton	MF	N	Food & Beverage	85	38
Loc Performance Products	Plymouth	Wayne	MF	E	Machinery, Equip. & Const.	72	700

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

The University Research Corridor, an alliance of Michigan State University, the University of Michigan and Wayne State University, retained its second place standing in 2016 for the fourth straight year in the Innovation Power Ranking among the nations most respected innovation clusters.

The University Research Corridor, an alliance of Michigan State University, the University of Michigan and Wayne State University, retained its second place standing in 2016 for the fourth straight year in the Innovation Power Ranking among the nations most respected innovation clusters.

Three global autonomous vehicle testing facilities: Mcity, at the University of Michigan; the American Center for Mobility; and the GM Mobility Research Center at Kettering University are located in Michigan.



# TOP 5

## Reasons to Invest in Bay County

### 2 *Low Cost of Living & Doing Business*

- Michigan is a Right to work state.
- Restructured Tax Policies
- Multigenerational skilled trade Work Force.
- Bay City is one of the top 5 most affordable cities\*



\*Forbes

### 1 *We've got the smarts*

High school graduation rates in Bay County are 89% which is 4% above the national average. Smarter people = better workers.

### 4 *We Make Stuff*

Bay County is strategically located in the great manufacturing belt, within a 500 mile radius of 52% of all U.S. Manufacturing, and of 45% of Canadian Personal Income. 187 manufacturing companies and three Fortune 500 companies are established in Bay County.



### 5 *We Have Water*

While many regions suffer through historic droughts and pundits prognosticate about the water wars of the future, Bay County straddles Tobico Marsh, an integral part of the largest contiguous freshwater coastal wetland in the U.S., and Saginaw Bay watershed is the largest drainage basin in Michigan.



### 3 *Yes! We're Hiring.*

Bay County's non-seasonally adjusted unemployment rate is the best in the state, and .4% below the national average.



### Bay Future Inc.

Trevor M. Keyes, President & CEO  
721 Washington Avenue, Suite 309  
Bay City, MI 48708  
Office: 989.892.1400  
Fax: 989.892.1402  
[bayfuture.com](http://bayfuture.com)





**“These meetings set the tone for how we want to govern – in a way that makes people feel welcome, seen, and heard, regardless of who they are or where they come from. Building One Minnesota means working across lines of difference to get things done, and healthy, open conversations are the start.”**

— Gov.-elect Tim Walz, after a post-election, 2,100-mile listening tour with Lt. Gov.-elect Peggy Flanagan featuring 23 events in five days in locations in every corner of the state

Minnesota Dept. of Employment & Econ. Dev.  
1st National Bank Bldg.  
332 Minnesota St., Suite #E200  
Saint Paul, MN 55101

Shawntera Hardy  
COMMISSIONER  
651-259-7114

[positivelyminnesota.com](http://positivelyminnesota.com)

# Minnesota

Pop. (2018): 5,657,912

Median household income: \$65,887

Credit Rating: AAA/Stable

Pop. growth 2018–2023: 0.84%

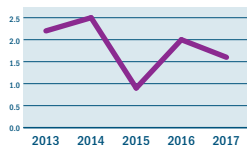
Median age: 39

Right-to-work state: No

## Legislative Update

- Governor Mark Dayton signed in May to ensure Minnesota’s public employee pension plans remain solvent. The new law requires public employees, retirees, and state government to all collectively share the burden of ensuring the long-term solvency of the plans.
- Before the enactment of this legislation, the State of Minnesota faced \$16.2 billion in unfunded liabilities (future debt) for public pensions. The bill signed by Governor Dayton places the State of Minnesota on a path to fully fund state pensions within 30 years. In addition, the new law will immediately eliminate \$3.4 billion in unfunded liabilities to ensure the security of workers’ hard-earned pensions and strengthen the state’s long-term fiscal security.

GDP  
**17<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$322,376.4**



**43<sup>rd</sup>**

Business Tax Climate Rank Change 2018-2019: +2



**24<sup>th</sup>**

Higher Ed. R&D Expenditure: \$968,784



**36<sup>th</sup>**

Number of NCRCs: 25,924 | Percent Improvement 2017-2018: 3.5%



**23<sup>rd</sup>**

2018 Workers' Comp Index Rate: 1.67



**38<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): 8.26



**36<sup>th</sup>**

Fiscal Condition Index Rank

- Awarded MnDOT \$157 million Corridors of Commerce infrastructure grant to greatly enhance movement of commerce, freight, and people on Hwy 169
- 500+ acres of undeveloped land
- A young, highly-skilled, and educated workforce within a short distance
- 41 parks, 35 miles of paved trails, and seasonal Farmers Market and concerts in the park
- Municipal electric utility provides 99.99% reliability

## Ahead of the Current

**Your Powerhouse Team**

**Holistic Approach to Business Attraction and Retention**  
The Economic Development Team has 10+ years of experience in land development, 11+ years of experience in business retention and expansion, and has coordinated over \$37 million in expansion projects.

**Colleen Eddy**  
Economic Development Specialist  
763.635.1000

**Amanda Othout**  
Economic Development Director  
ElkRiverMN.gov

St. Cloud

City of Elk River

Minneapolis/St. Paul





**“The effectiveness of Jobs for Montana’s Graduates is remarkable, and it’s one to be celebrated by students, families, teachers and communities across the state.”**

— Gov. Steve Bullock on November 29th, on the program’s being awarded a national performance award

**Governor’s Office of Econ. Dev.**  
State Capitol, Office 234  
Box 200801  
Helena, MT 59620

**Ken Fichtler**  
CHIEF BUSINESS DEVELOPMENT OFFICER  
406-444-5634

[business.mt.gov](http://business.mt.gov)

# Montana

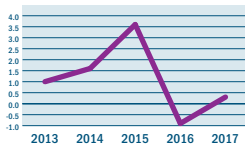
**Pop. (2018):** 1,068,947  
**Median household income:** \$50,833  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 1.00%  
**Median age:** 41  
**Right-to-work state:** No

## Legislative Update

- The Montana Legislature only meets in odd-numbered years, so no new legislation was enacted in 2018.
- In September, Governor Steve Bullock and Lt. Governor Mike Cooney launched a new initiative of the Main Street Montana Project that will focus on building economic opportunities in small towns and rural and tribal communities in Montana. The state’s leaders will be developing new partnerships with leaders, businesses, local organizations and community members in rural communities to bridge resource and capacity gaps, address challenges unique to rural Montana, and connect communities to share opportunities.
- In 2013, Governor Bullock launched the Main Street Montana Project and engaged public and private sectors in a partnership to implement a business plan for Montana by Montanans and provide direction for Montana’s economic future.

**GDP**  
**48<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$44,410.7**



**5<sup>th</sup>**  
Business Tax Climate Rank Change 2018-2019: **0**



**41<sup>st</sup>**  
Higher Ed. R&D Expenditure: **\$229,206**



**41<sup>st</sup>**  
Number of NCRs: **1,792** | Percent Improvement 2017-2018: **1.9%**



**38<sup>th</sup>**  
2018 Workers' Comp Index Rate: **2.01**



**2<sup>nd</sup>**  
Lowest Electric Power Cost (cents/kWh): **5.03**



**1<sup>st</sup>**  
Fiscal Condition Index Rank



**“The presence of global life sciences companies like Teva Pharmaceuticals is critical to New Jersey’s ability to strengthen a thriving innovation ecosystem.”**

— Gov. Phil Murphy on July 5th commenting on the Israeli pharmaceutical company’s announcement that it would locate its U.S. headquarters in Parsippany-Troy Hills

**New Jersey Econ. Dev. Authority**  
36 West State Street  
Trenton, NJ 08625

**Timothy Lizura**  
PRESIDENT/COO  
609-858-6700

[Njeda.com](http://Njeda.com)

# New Jersey

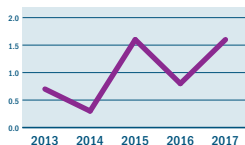
**Pop. (2018):** 9,112,878  
**Median household income:** \$78,126  
**Credit Rating:** A-/Stable

**Pop. growth 2018–2023:** 0.43%  
**Median age:** 40  
**Right-to-work state:** No

## Legislative Update

- The fiscal year 2019 budget signed into law imposes a surtax on corporation business tax liability, decouples certain provisions from Internal Revenue Code and imposes tax on certain dividends.
- The Garden State Film and Digital Media Jobs Act provides film and television production companies with business tax and gross income tax credits for certain expenses incurred while filming in New Jersey. The legislation will encourage production companies to locate in New Jersey, spurring economic growth and industry development.
- In July, Governor Phil Murphy announced two important tools – the Incubator and Collaborative Workspace Rent Initiative (ICWRI) and a modernized Research and Development (R&D) tax credit to support new and established high-tech companies in growing the Garden State’s Innovation Economy.

**GDP**  
**8<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$546,500.1**



**50<sup>th</sup>**  
Business Tax Climate Rank Change 2018-2019: **0**



**19<sup>th</sup>**  
Higher Ed. R&D Expenditure: **\$1,253,256**



**42<sup>nd</sup>**  
Number of NCRs: **786** | Percent Improvement 2017-2018: **1.8%**



**48<sup>th</sup>**  
2018 Workers' Comp Index Rate: **2.84**



**42<sup>nd</sup>**  
Lowest Electric Power Cost (cents/kWh): **10.26**



**45<sup>th</sup>**  
Fiscal Condition Index Rank



**“Furniture manufacturing is an important economic driver in North Mississippi, and Williams-Sonoma’s decision to open a new Sutter Street Manufacturing facility in Lee County – along with 350 new jobs – bolsters this important sector in our state.”**

— Gov. Phil Bryant, on the manufacturer’s expansion announcement on December 6th

**Mississippi Development Authority**  
501 North West Street  
Jackson, MS 39201  
Glenn McCullough, Jr.  
EXECUTIVE DIRECTOR  
601-359-3449

**Mississippi.org**

# Mississippi

**Pop. (2018):** 3,051,594  
**Median household income:** \$42,371  
**Credit Rating:** AA/Stable

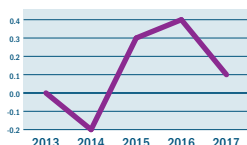
**Pop. growth 2018–2023:** 0.27%  
**Median age:** 37  
**Right-to-work state:** Yes

## Legislative Update

Among bills into law in 2018 by Gov. Bryant:

- HB 393 revises the powers and duties of the State Inland Port Authority.
- HB 1607 revises the powers and duties of the Mississippi Development Authority (MDA) to assist the Department of Environmental Quality with economic viability assessments.
- SB 2479 reduces the eligible amount for a fee-in-lieu from \$100 million to \$60 million.
- SB 2773 appropriates money to MDA for the National Diabetes and Obesity Research Center contract with the Cleveland Clinic, the Greenville Airport, and the Air Service Development Act.
- SB 2968 appropriates money to MDA to reimburse the Office of State Aid Road Construction;
- SB 2996 appropriates money to fund MDA.
- SB 2998 exempts certain rotary-wing aircraft from sales tax.

**GDP**  
**36<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$100,139.5**



**31<sup>st</sup>**

Business Tax Climate Rank Change 2018-2019: -2



**34<sup>th</sup>**

Higher Ed. R&D Expenditure: \$479,122



**6<sup>th</sup>**

Number of NCRCs: **101,608** | Percent Improvement 2017-2018: **30.0%**



**20<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.54**



**12<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.09**



**15<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Continental Tire The Americas	Clinton	Hinds	MF	N	Chemicals & Plastics	1,450	2,500
Toyota Motor Corp.	Blue Springs	Union	MF	E	Automotive	170	400
Auto Parts Manufacturing Mississippi	Guntown	Lee	MF	E	Chemicals & Plastics	100	50
Raytheon Co.	Forest	Scott	MF/RD	E	Aerospace	100	
Cooper Tire & Rubber Co.	Byhalia	Marshall	DW	N	Chemicals & Plastics	50	100
Peco Foods	West Point	Clay	MF/DW	N	Food & Beverage	40	300
Nufarm Americas	Greenville	Washington	MF	N	Chemicals & Plastics	20	68
Fastenal Co.	Gluckstadt	Madison	DW	N	Machinery, Equip. & Const.	12	60
Unified Brands	Vicksburg	Warren	MF	N	Machinery, Equip. & Const.	10	425
Richardson Molding	Philadelphia	Neshoba	MF	E	Chemicals & Plastics	5	53
Seemann Composites	Gulfport	Harrison	MF	N	Transport & Logistics	5	46
Industrial Wood Products	Vicksburg	Warren	MF	E	Wood Products	2	50
Vertex Aerospace	Madison	Madison	HQ	N	Aerospace	1	70
Bradbury Logistics & Services	Aberdeen	Monroe	MF	N	Metals	1	150
Home	Ridgeland	Madison	HQ	N	Business & Financial Services		
Dsv Solutions/DSV A/S	Horn Lake	DeSoto	DW	N	Transport & Logistics		

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Mississippi’s 15 community colleges offer 26,403 training classes and serve more than 550 companies with customized training solutions.

Mississippi’s top five export destination countries in 2017 were Canada (\$2.2 billion), Mexico (\$1 billion), Panama (\$855 million), China (\$564 million) and Guatemala (\$420 million).

Tourism accounts for an estimated 86,600 direct jobs in Mississippi; it’s the state’s fourth-largest private sector employer and one of the state’s largest export industries.





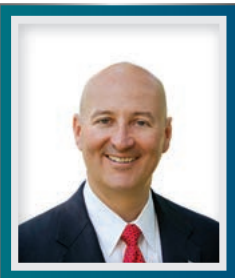
THE ROLLS-ROYCE TRENT 1000 ALPS  
STENNIS SPACE CENTER

## THE STATE OF **INNOVATION**

**IF MISSISSIPPI INSPIRES VISIONS OF MAGNOLIAS AND THE BLUES, IT'S TIME TO TAKE A CLOSER LOOK.**

Mississippi is also home to NASA, Raytheon, Airbus, Rolls-Royce, Lockheed Martin and Northrop Grumman – just some of the global innovators who have recognized the undeniable upside of doing business in Mississippi.

*For information about available sites and more, contact the  
Mississippi Power Economic Development Team at [mississippipowerED.com](http://mississippipowerED.com).*



**“For the first time ever, Nebraska is delivering over \$2 billion in property tax relief and aid to local governments. Property tax relief has been a top priority in each of my budgets, and it will be my top priority in the upcoming budget.”**

— Gov. Pete Ricketts, October 1, 2018

Nebraska Dept. of Econ. Dev.  
301 Centennial Mall South #4  
Lincoln, NE 68508

Courtney Dentlinger  
DIRECTOR  
402-471-3746

[opportunity.nebraska.gov](http://opportunity.nebraska.gov)

# Nebraska

Pop. (2018): 1,957,158  
Median household income: \$56,415  
Credit Rating: AAA/Stable

Pop. growth 2018–2023: 0.79%  
Median age: 37  
Right-to-work state: Yes

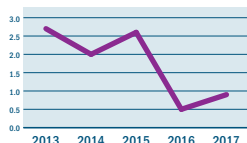
## Legislative Update

- LB 1090 was a bill to adjust individual income tax brackets and the personal exemption credit, and establish that the standard deduction be based on the Consumer Price Index.

A report from the Nebraska Department of Revenue shows that the State of Nebraska provided \$2.045 billion in property tax relief and aid to local government agencies over the last year:

- In the last five years, aid to local governments has grown from \$1,692,725,473 in 2013-14 to \$2,045,921,331 in 2017-18.
- In the most recent budget approved by Governor Ricketts and the Legislature, state aid to K-12 schools grew four times faster than the overall state budget.
- In the last four years, the Governor and Legislature have successfully worked together to increase the property tax credit relief by 60 percent.

GDP  
**35<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$111,466.2**



**24<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **+2**



**32<sup>nd</sup>**

Higher Ed. R&D Expenditure: **\$513,581**



**2<sup>nd</sup>**

Number of NCRCs: **2,984** | Percent Improvement 2017-2018: **52.6%**



**25<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.7**



**31<sup>st</sup>**

Lowest Electric Power Cost (cents/kWh): **7.65**



**10<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Continental Tire The Americas	Clinton	Hinds	MF	N	Chemicals & Plastics	1,450	2,500
Toyota Motor Corp.	Blue Springs	Union	MF	E	Automotive	170	400
Auto Parts Manufacturing Mississippi	Guntown	Lee	MF	E	Chemicals & Plastics	100	50
Raytheon Co.	Forest	Scott	MF/RD	E	Aerospace	100	
Cooper Tire & Rubber Co.	Byhalia	Marshall	DW	N	Chemicals & Plastics	50	100
Peco Foods	West Point	Clay	MF/DW	N	Food & Beverage	40	300
Nufarm Americas	Greenville	Washington	MF	N	Chemicals & Plastics	20	68
Fastenal Co.	Gluckstadt	Madison	DW	N	Machinery, Equip. & Const.	12	60
Unified Brands	Vicksburg	Warren	MF	N	Machinery, Equip. & Const.	10	425
Richardson Molding	Philadelphia	Neshoba	MF	E	Chemicals & Plastics	5	53
Seemann Composites	Gulfport	Harrison	MF	N	Transport & Logistics	5	46
Industrial Wood Products	Vicksburg	Warren	MF	E	Wood Products	2	50
Vertex Aerospace	Madison	Madison	HQ	N	Aerospace	1	70
Bradbury Logistics & Services	Aberdeen	Monroe	MF	N	Metals	1	150
Horne	Ridgeland	Madison	HQ	N	Business & Financial Services		
DSV Solutions/DSV A/S	Horn Lake	DeSoto	DW	N	Transport & Logistics		

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?


The 97,300 manufacturing employees in Nebraska received an average annual compensation of \$59,867, which is roughly \$17,200 more than the state's average non-farm wages.

The top manufacturing sectors in Nebraska are: food and beverages; chemical products; machinery; fabricated metal products; motor vehicles and parts; plastic and rubber products; computer and electronic products; mineral products; and electrical equipment and appliances.

Nebraska ranks second in the U.S. in total size of assets held by insurance companies, of which more than 180 call the state home.



# Location Isn't Just Defined By A Dot On The Map.



Finding the right location for your new or expanding business requires a complex mix of widespread transportation infrastructure, low-cost and reliable energy, shovel-ready sites, abundant workforce availability, and a healthy dose of “can-do” attitude. And you can find it all in Nebraska — the perfect state for business success and excellent quality of life.

Let Nebraska Public Power District's economic development team pinpoint that building, site, or community in Nebraska that perfectly meets your needs. Visit [sites.nppd.com](http://sites.nppd.com) today.

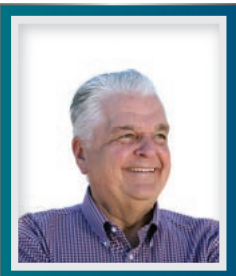
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**“Every big business started with a small business. They started small, and I want to encourage those entrepreneurs to have an opportunity to grow, to become a part of Nevada and the dream that we all realized.”**

— Gov.-elect Steve Sisolak, Nov. 8, 2018, on KNPR’s “State of Nevada” program

**Nevada Governor’s Office  
of Econ. Dev.**  
555 E. Washington Ave.,  
Suite 5400  
Las Vegas, NV 89101  
**Steve Hill**  
EXECUTIVE DIRECTOR  
702-486-2700

[diversifynevada.com](http://diversifynevada.com)

# Nevada

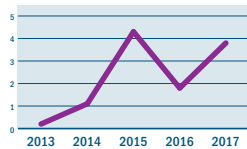
**Pop. (2018):** 3,025,735  
**Median household income:** \$55,443  
**Credit Rating:** AA/Positive

**Pop. growth 2018–2023:** 1.59%  
**Median age:** 38  
**Right-to-work state:** Yes

## Legislative Update

- The Nevada legislature did not hold a regular session in 2018.
- On April 23rd, Governor Brian Sandoval nominated 61 Opportunity Zones, pursuant to the Tax Cuts and Jobs Act of 2017, which established an Opportunity Zone tax incentive, designed to encourage long-term private investment in low-income communities. All 61 were certified by the U.S. Treasury in June.
- “During my time as Governor, we have invested significant resources in Nevada,” Governor Brian Sandoval said. “While we have seen substantial returns, there are still parts of our state that need additional assistance. It is my hope that by nominating these 61 low-income opportunity zones, private investors will choose to fund projects in these areas that benefit the Nevadans who need it most. What’s more, we believe that communities surrounding the 61 opportunity zones will also benefit from investment in the zones.”

**GDP**  
**33<sup>rd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$142,851.9**



**9<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -2

**43<sup>rd</sup>**

Higher Ed. R&D Expenditure: **\$205,761**



**12<sup>th</sup>**

Number of NCRCS: **8,560** | Percent Improvement 2017-2018: **21.5%**



**6<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.18**



**32<sup>nd</sup>**

Lowest Electric Power Cost (cents/kWh): **7.67**



**12<sup>th</sup>**



Fiscal Condition Index Rank





## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Google	Henderson	Clark	DT	N	IT & Comm.	600	50
Aero-Spec Ndt Services	Reno	Washoe	OF/MF	N	Business & Financial Services	125	30
Sephora	North Las Vegas	Clark	DW	N	Life Sciences	103	460
Komatsu Equipment Co.	Elko	Elko	MF/DW	N	Machinery, Equip. & Const.	47	
Krs Global Biotechnology	Henderson	Clark	MF	N	Life Sciences	35	50
Oasis Biotech	Las Vegas	Clark	MF	N	Food & Beverage	30	135
Axion Corp.	Reno	Washoe	MF/DW/HQ/RD	N	Electronics	28	205
C4 Mining Co.		Clark	OF/DW	N	Business & Financial Services	25	13
Smith'S Food & Drug Centers	Henderson	Clark	DW	N	Life Sciences	23	182
G4 Works		Clark	MF/DW	E	Transport & Logistics	20	20
Mecp1 Reno 1	McCarran	Washoe	OF	N	IT & Comm.	19	50
Advance Technologies Management		Clark	MF	E	Paper, Printing & Packaging	18	50
MMMG	Sparks	Washoe	MF/RD	N	Life Sciences	15	

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

### Did You Know?

In addition to its home base in Las Vegas, data center company Switch has started operations at its Citadel Campus in Tahoe Reno, which will have a capacity of up to 17.4 million sq. ft. and up to 850 MW of power upon completion, making it the world's largest colocation data center campus.

In advance of the move of the NFL's Raiders team to Las Vegas in two years, in February the Henderson City Council approved the sale of 55 acres of land near the Henderson Executive Airport for \$6 million to the NFL's Raiders organization for the team's training complex and corporate headquarters. The project is expected to bring about 250 full-time jobs for non-players to Henderson.

R&D expenditures at the University of Nevada, Las Vegas totaled more than \$66 million in FY17, and university innovators were issued eight patents. The Carnegie Classification of Institutions of Higher Education in December 2018 gave UNLV "R1" status, a designation reserved for institutions with "very high research activity."

## SMALL BATCH BIG DISTRIBUTION

Logistically, a lot of things need to happen in order to make, package and ship delicate chocolates internationally with 99% of orders arriving damage-free. Located in Henderson, Nevada, Ethel M Chocolates is able to deliver thanks to Henderson's proximity to international airports, highways and California seaports.

Also known as Wow Valley, Henderson is located in the Las Vegas Metro Area, which offers a unique combination of business and lifestyle amenities that help both people and companies thrive. So whether you are running a company, looking to grow or relocating, Henderson is for you.

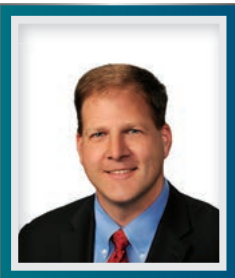
*Discover how Henderson's competitive advantages make life sweet for businesses at:*

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**HENDERSON**  
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**“In our ever-changing economy, we must make strategic one-time investments to meet the long-term skilled workforce needs of our state and ensure the next generation has the opportunities available to advance their careers.”**

— Gov. Chris Sununu on October 24, 2018, on an initiative to address workforce shortage in New Hampshire’s healthcare industry and to invest in the future of the state’s STEM workforce.

New Hampshire Div. of Econ. Dev.  
172 Pembroke Rd.  
Concord, NH 03302

Chris Way  
ACTING DIRECTOR  
603-271-2591

[nheconomy.com](http://nheconomy.com)

# New Hampshire

**Pop. (2018):** 1,374,067  
**Median household income:** \$71,195  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.50%  
**Median age:** 43  
**Right-to-work state:** No

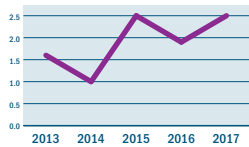
## Legislative Update

Governor Chris Sununu, Attorney General Gordon MacDonald, and Business and Economic Affairs Commissioner Taylor Caswell announced in August further actions by New Hampshire State Government in the wake of the United States Supreme Court’s decision in South Dakota v. Wayfair, Inc.

In that decision, the court overturned existing law, which required that a seller be physically present in a state before that state may impose sales and use tax collection obligations upon the seller. As a result, more than 10,000 jurisdictions that have a sales and use tax may seek to impose collection requirements on out-of-state sellers, potentially including New Hampshire businesses.

“The actions announced today are important steps that the Executive Branch can take while we continue to push for legislative action,” Sununu said. “While we remain hopeful that meaningful legislation can be enacted either this fall or next session, I have made clear to my administration that state government must do all it can in the meantime to protect New Hampshire businesses in the weeks and months ahead.”

**GDP**  
**39<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$74,408.0**



**6<sup>th</sup>**  
Business Tax Climate Rank Change 2018-2019: **0**



**35<sup>th</sup>**  
Higher Ed. R&D Expenditure: **\$455,859**



**22<sup>nd</sup>**  
Number of NCRCS: **6,821** | Percent Improvement 2017-2018: **9.1%**



**25<sup>th</sup>**  
2018 Workers' Comp Index Rate: **1.7**



**44<sup>th</sup>**  
Lowest Electric Power Cost (cents/kWh): **13.12**



**48<sup>th</sup>**  
Fiscal Condition Index Rank

*Make a*  
**LEADER**



*Make a*  
**COMMUNITY**



*Make a*  
**SPLASH**



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[newbiz@claremonthnh.com](mailto:newbiz@claremonthnh.com)

CITY OF  
**CLAREMONT**  
New Hampshire





**"We have gifted researchers, entrepreneurs and technology right here in North Dakota — as well as natural attributes such as open skies, variable climate, agriculture and energy — to diversify our economy and continue our trajectory as a national leader in UAS."**

— Gov. Doug Burgum, announcing in November a \$30 million proposal to build out infrastructure that would support beyond visual line of sight (BVLOS) operations for unmanned aircraft systems (UAS) across North Dakota

North Dakota Dept. of Econ. Dev.  
1600 E. Century Ave., #2  
Bismarck, ND 58503  
John Schneider  
DIRECTOR ED/FINANCE  
701-328-5300

[business.nd.gov](http://business.nd.gov)

# North Dakota

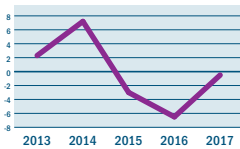
Pop. (2018): 797,210  
Median household income: \$60,183  
Credit Rating: AA+/Stable

Pop. growth 2018–2023: 1.88%  
Median age: 38  
Right-to-work state: Yes

## Legislative Update

- In response to an infrastructure funding package proposed by Republican legislators in July, in advance of the coming biennial session in 2019, Gov. Burgum said, "We commend legislative leaders for proposing a plan that addresses critical infrastructure needs across our entire state for the long-term benefit of our citizens, while also still maintaining funding for hub cities in the oil patch."
- Burgum in April designated 25 areas in North Dakota as Opportunity Zones under the federal Tax Cuts and Jobs Act of 2017.
- Burgum in March convened 60 leaders to update them on his administration's five strategic priorities: Reinventing Government, Main Street Initiative, Transforming Education, Tribal Partnerships and Behavioral Health. "Budget challenges, demographics, digital transformation, cybersecurity challenges and very tight national, state and local labor markets are all powerful forces," he said, "that will require us to re-envision our current siloed agency approach to delivering services."

GDP  
**46<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$50,795.4**



**17<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: +2



**40<sup>th</sup>**

Higher Ed. R&D Expenditure: \$255,942



**1<sup>st</sup>**

Number of NCRCs: 1,309 | Percent Improvement 2017-2018: 72.2%



**1<sup>st</sup>**

2018 Workers' Comp Index Rate: 0.82



**39<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): 8.55



**23<sup>rd</sup>**

Fiscal Condition Index Rank



**"We cannot recruit businesses, we cannot do education properly, if we don't have high-speed internet to a lot of our small towns in this state."**

— Gov.-elect Kristi Noem, in pre-election comments to Fox affiliate station KEVN, Nov. 4, 2018

South Dakota Governor's  
Office of Econ. Dev.  
711 E. Wells Ave.  
Pierre, SD 57501

Scott Stern  
COMMISSIONER  
605-773-4633

[sreadytowork.com](http://sreadytowork.com)

# South Dakota

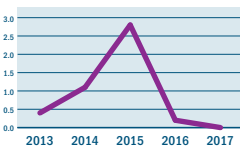
Pop. (2018): 889,876  
Median household income: \$54,091  
Credit Rating: AAA/Stable

Pop. growth 2018–2023: 1.05%  
Median age: 38  
Right-to-work state: Yes

## Legislative Update

- After the U.S. Supreme Court ruled in Wayfair vs. South Dakota that states can collect sales tax from out-of-state online retailers, Gov. Dennis Daugaard called a special session in order to lift an injunction blocking the state from doing just that. Sales tax collection began on November 1.
- Lawmakers passed a funding arrangement for new precision agriculture labs and classroom space at South Dakota State University in Brookings.
- A multi-state licensure agreement for about 150 different occupations that would have allowed certain professionals to work in South Dakota if they were licensed in another state failed in the House.

GDP  
**47<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$45,431.3**



**3<sup>rd</sup>**

Business Tax Climate Rank Change 2018-2019: -1



**50<sup>th</sup>**

Higher Ed. R&D Expenditure: \$112,916



**8<sup>th</sup>**

Number of NCRCs: 26,426 | Percent Improvement 2017-2018: 26.2%



**28<sup>th</sup>**

2018 Workers' Comp Index Rate: 1.73



**37<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): 7.99



**3<sup>rd</sup>**

Fiscal Condition Index Rank



**“We must make attracting outside money to our state a priority. FDI will help to stimulate economic growth and development while providing financing for development, contact with new technologies, better management techniques, and access to international markets. States across the country are miles ahead of where we need to be.”**

— Gov.-Elect Michelle Lujan Grisham, in her economic policy plan

New Mexico Econ. Dev. Dept.

Joseph M. Montoya Bldg.  
1100 S. St. Francis Dr.  
Santa Fe, NM 87505

Therese Varela

DIRECTOR  
505-827-0323

gonm.biz

# New Mexico

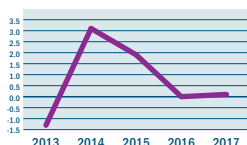
Pop. (2018): 2,147,526  
Median household income: \$47,457  
Credit Rating: AA/Stable

Pop. growth 2018–2023: 0.43%  
Median age: 38  
Right-to-work state: No

## Legislative Update

- In May, Governor Martinez announced 63 Opportunity Zone designations in New Mexico. The Tax Cuts and Jobs Act created Opportunity Zones to spur investment in distressed communities throughout the country. New investments in Opportunity Zones can receive preferential tax treatment. New Mexico's Opportunity Zones are located in rural, tribal and urban communities in 22 counties.
- Designation as an Opportunity Zone allows for the creation of a new class of investment vehicle with tax advantages authorized to aggregate and deploy private investment to support economic development projects located in Opportunity Zones. The purpose of these tax advantages is to attract capital investment into economically-distressed areas.

GDP  
**37<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$90,969.1**



**25<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -1



**36<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$374,131**



**25<sup>th</sup>**

Number of NCRs: **34,800** | Percent Improvement 2017-2018: **8.5%**



**17<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.5**



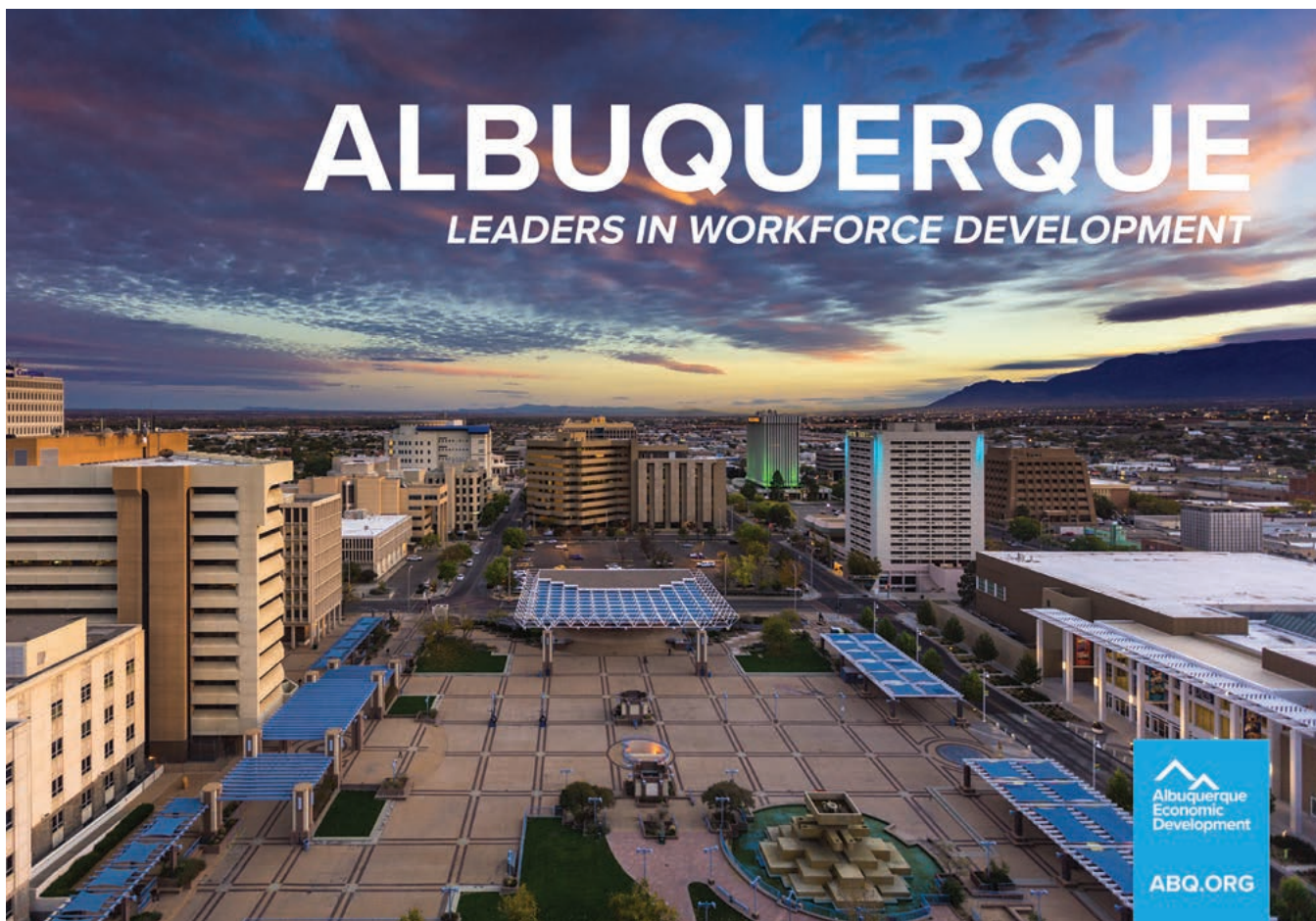
**8<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **5.82**



**41<sup>st</sup>**

Fiscal Condition Index Rank







**“I want us to be top 10 in education ... and to make sure we have the right funding for schools. And not only common ed. We have to work with CareerTech and higher ed. Everything we do has to be student-focused.”**

— Gov.-elect Kevin Stitt, in a Nov. 7 interview with Tulsa World

**Oklahoma Department of Commerce**  
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 Oklahoma City, OK 73104  
 Deby Snodgrass  
 EXECUTIVE DIRECTOR/  
 SECRETARY OF COMMERCE AND TOURISM EXECUTIVE  
 405-815-5306

[Okcommerce.gov](http://Okcommerce.gov)

# Oklahoma

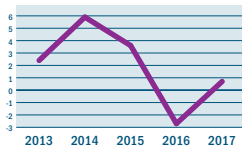
**Pop. (2018):** 4,035,516  
**Median household income:** \$50,384  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.79%  
**Median age:** 38  
**Right-to-work state:** Yes

## Legislative Update

- The first new taxes passed in Oklahoma in 30 years were signed into law by outgoing Gov. Mary Fallin in March, with revenues to be directed toward teacher pay raises averaging \$6,100 a year. But that did not prevent teachers from staging a two-week walkout in protest of long-term cuts to education funding. In addition to higher gas and cigarette taxes, the gross production tax on oil and gas wells will rise from 2 to 5 percent, which is expected to cost the industry about \$170 million a year.
- An amendment to the Small Employer Quality Jobs Incentive Act increases the initial employment threshold from 90 to 500 full-time employees and modifies the minimum new employment level requirements based on the population of the municipality where the establishment applying is located.
- A new law provides that the Oklahoma Tax Commission is authorized and directed to make tax credit data available on its website on or before January 1, 2020.

**GDP**  
**28<sup>th</sup>**



**2017 GDP**  
 (in millions of current US\$)  
**\$190,917.5**



**26<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -5



**33<sup>rd</sup>**

Higher Ed. R&D Expenditure: **\$506,458**



**29<sup>th</sup>**

Number of NCRs: **141,005** | Percent Improvement 2017-2018: **6.2%**



**27<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.71**



**27<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **5.12**



**31<sup>st</sup>**

Fiscal Condition Index Rank

**3<sup>rd</sup>**  
T



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Business & Economic Development

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**“The continued growth of Regeneron here in New York is yet another indication that we are leading the way in the life sciences and attracting the jobs of tomorrow. Regeneron’s expansion will further drive economic growth in the Capital Region and fuel lifesaving innovation and development that benefits the entire world.”**

— Gov. Andrew Cuomo on September 11th commenting on Regeneron’s \$800-million expansion in Rensselaer County, which is forecast to create 1,500 new jobs

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633 Third Avenue  
Floor 37  
New York City, NY 10017

**Howard Zemsky**  
PRESIDENT/CEO  
212-803-3100

[Esd.ny.gov](http://Esd.ny.gov)

# New York

**Pop. (2018):** 20,070,143

**Median household income:** \$63,751

**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 0.38%

**Median age:** 39

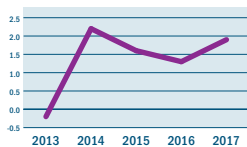
**Right-to-work state:** No

## Legislative Update

A \$163.8 billion budget bill was signed into law in April 2018. Among other provisions, it earmarks:

- \$26.7 billion for education funding, a \$1 billion increase over the previous year.
- \$7.6 billion for higher education.
- \$1.2 billion towards programs aimed at making higher education affordable.
- \$118 million for the Excelsior Scholarship, a program which allows eligible students to attend CUNY and SUNY colleges for free.

**GDP**  
**3<sup>rd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$1,414,313.4**



**48<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **+1**



**2<sup>nd</sup>**

Higher Ed. R&D Expenditure: **\$6,359,672**



**3<sup>rd</sup>**

Number of NCRCs: **2,829** | Percent Improvement 2017-2018: **49.6%**



**50<sup>th</sup>**

2018 Workers' Comp Index Rate: **3.08**



**11<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.07**



**9<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Amazon.com	Borough of Queens	Queens	HQ	N	Electronics	2,500	25,000
Google	New York City	New York	HQ	N	IT & Comm.	1,000	
Latham & Watkins	New York City	New York	OF	N	Business & Financial Services	440	
Conmed Corp.	Lancaster	Erie	MF	N	Life Sciences	365	
WeWork Companies	New York City	New York	OF	N	Business & Financial Services	200	
Regeneron Pharmaceuticals	East Greenbush	Rensselaer	MF	E	Life Sciences	188	300
Apollo Global Management	New York City	New York	HQ	E	Business & Financial Services	165	
Northwell Health	Bethpage	Nassau	MF/DW	N	Life Sciences	80	
Alexandron Grup Romania SRL	Carmel	Putnam	MF	N	Food & Beverage	40	102
Urban FT	New York City	New York	OF	N	IT & Comm.	32	
Asahi-Shuzo Sake Brewing Co./ Culinary Institute Of America	Hyde Park	Dutchess	MF	N	Food & Beverage	28	
Discovery Communications	Manhattan	New York	HQ	N	IT & Comm.	25	
Travelclick	New York City	New York	OF	N	IT & Comm.	24	
Milburn Ridgefield Corp.	New York City	New York	OF	N	Business & Financial Services	24	

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

New York is home to more than 350,000 software and digital media jobs and 22,000 firms. Digital media contributes \$5 billion to New York's economy and accounts for 100,000 jobs in New York City alone.

New York State ranks No. 2 among states with adults who have four or more years of college education. The Long Island-based Center for Biotechnology helps start and grow biotech firms with resources including four incubators and a 245-acre research park.

One of the largest wind farms east of the Mississippi River, capable of producing 320 MW of clean, renewable energy, is located in upstate New York off the eastern end of Lake Ontario.



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**FIND WHERE YOU BELONG IN ALLEGANY COUNTY, NY** | [alleganyco.com/economic-development](http://alleganyco.com/economic-development)



**“Advance is expanding its technology, data analytics and e-commerce capabilities in North Carolina because we have the talent, training opportunities, education system and industry expertise to make this venture a success.”**

— Gov. Roy Cooper, Nov. 28, 2018, announcing that Advance Auto Parts would designate Raleigh as its corporate HQ and add 435 jobs over the next five years

**Econ. Dev. Partnership  
of North Carolina**  
15000 Weston Parkway  
Cary, NC 27513

**Christopher Chung**  
CEO  
919-447-7777

**Edpnc.com**

# North Carolina

**Pop. (2018):** 10,455,604

**Median household income:** \$51,844

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 1.13%

**Median age:** 39

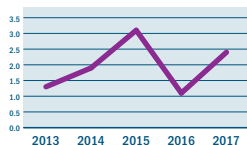
**Right-to-work state:** Yes

## Legislative Update

- Overriding a veto from Governor Roy Cooper, North Carolina Republicans approved a \$23.9 billion state budget for 2018-19. Among its provisions: The personal income tax rate would fall to 5.25 percent in 2019 from the current 5.499 percent, and the corporate income tax rate would fall from 3 percent to 2.5 percent, beginning in 2019. Under the new rates, North Carolina will have the lowest rate of any state imposing a corporate income tax rate.
- The budget also lowers the threshold for transformative grants for Job Development Investment Grants (JDIG) from \$4 billion to \$1 billion and the minimum requirement of promised jobs from 5,000 to 3,000. And it creates the Growing Rural Economies for Access to Technology Program (GREAT), which grants taxpayer dollars to broadband providers to set up broadband in underserved areas.

**GDP**

**11<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$484,308.3**



**12<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -1



**7<sup>th</sup>**

Higher Ed. R&D Expenditure: \$3,081,568



**18<sup>th</sup>**

Number of NCRCs: 438,921 | Percent Improvement 2017-2018: 13.1%



**32<sup>nd</sup>**

2018 Workers' Comp Index Rate: 1.84



**21<sup>st</sup>**

Lowest Electric Power Cost (cents/kWh): 6.79



**19<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Publix Super Markets	Greensboro	Guilford	DW	N	Food & Beverage	400	
Amazon.Com	Charlotte	Mecklenburg	DW	N	Electronics	200	1,500
GE Aviation Systems	Asheville	Buncombe	MF	E	Aerospace	105	131
Mineco	Andrews	Cherokee	DT	N	IT & Comm.	100	40
Glenmark Pharmaceuticals	Monroe	Union	MF	N	Life Sciences	100	
Coty US	Sanford	Lee	MF	E	Chemicals & Plastics	96	22
Amada America	High Point	Guilford	MF	N	Machinery, Equip. & Const.	87	201
United Parcel Service	Charlotte	Mecklenburg	DW	N	Transport & Logistics	72	120
Lakeside Produce	Mills River	Henderson	MF/DW	N	Food & Beverage	69	150
Novo Nordisk A/S	Clayton	Johnston	MF	E	Life Sciences	65	18
Corning	Hickory	Catawba	MF	N	IT & Comm.	60	110
Avexis	Durham	Durham	MF	N	Life Sciences	55	200
Albaad USA	Reidsville	Rockingham	MF	E	Chemicals & Plastics	45	302

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

When Apple in December picked Austin, Texas, instead of finalist North Carolina for a \$1-billion corporate campus, Gov. Cooper and legislative leaders issued a statement saying in part, “We’re on pace to add thousands of good-paying jobs this year with more expected next year. There’s no better place to find a top-tier IT workforce and legislative leaders have worked closely with the administration to attract large employers and technology companies like Apple. We’ll keep doing everything we can to bring more good jobs to North Carolina.”

In a literal case of one-upmanship, eight days after Advance Auto Parts announced a 435-job expansion in Raleigh and Wake County, online loan company LendingTree in December announced a 436-job expansion at its HQ in Charlotte.

North Carolina tourism generated record visitor spending in 2017 with a total of \$23.9 billion, a 4.2-percent increase from 2016. It also supported 225,000 jobs (another record), according to a report from the U.S. Travel Association in May 2018.



## WHAT ARE Smart Sites?



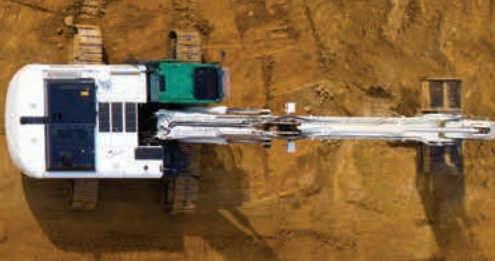
-  **SHOVEL-READY** for development
-  **ON-SITE** municipal electric service
-  **WATER & SEWER** within 500 feet
-  **WITHIN 5 MILES** of Interstate or Interstate-quality highway
-  **REVIEWED & QUALIFIED** by consultants and engineers

Smart Sites are an excellent choice for companies that are ready to grow now.

Faster construction, fewer uncertainties and less risk for companies and site selectors alike— that's the genius of the Smart Sites qualification program. But that's not all. Our many Smart Sites are located in some of the best places in America to live and do business with easy access to international shipping and transportation.

To learn more about these properties and our growing list of other Smart Sites, contact **Brenda Daniels** at **800.768.7697 ext. 6363** or [bdaniels@electricities.org](mailto:bdaniels@electricities.org). It's a no-brainer.

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### Greenville



#### GREENVILLE, INDIGREEN CORPORATE PARK:

- ▶ 95 acres, Smart Sites qualified
- ▶ US 264 (1.2 mi)
- ▶ Sale price: \$30,000 per acre

### Shelby



#### SHELBY, WASHBURN SWITCH INDUSTRIAL PARK:

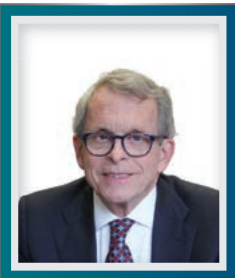
- ▶ 64 acres, Smart Sites qualified
- ▶ Future US 74 Bypass (0.4 mi); US 74 (1.25 mi)
- ▶ Rail: CSX
- ▶ Sale price: TBD

### Kinston



#### KINSTON, HIGHWAY 70 INDUSTRIAL PARK:

- ▶ 34 acres, Smart Sites qualified
- ▶ US 70 (0.07 mi)
- ▶ On-site rail: Norfolk Southern
- ▶ Sale price: \$22,500 per acre



**“There’s a facility there, owned by General Motors, that we think could be used by other people, other businesses who can employ a lot of people in the Mahoning Valley, and I’ll just ... let it go at that.”**

— Gov.-elect Mike DeWine, in a December interview with NBC affiliate WLWT in Cincinnati, speaking to GM’s plan to shut down production at its longtime plant in Lordstown

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# Ohio

**Pop. (2018):** 11,772,676

**Median household income:** \$53,378

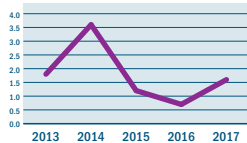
**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 0.25%

**Median age:** 40

**Right-to-work state:** No

**GDP**  
**7<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$590,692.0**

## Legislative Update

- Outgoing Gov. John Kasich in May announced the creation by executive order of the Office of Opportunities for New Americans. “As we have become one of the nation’s top job creators, our businesses increasingly need a robust pipeline of hard-working people,” he said. “The Buckeye State is a great, welcoming place to work and raise a family, and whether you are from Indiana or India, New England or Old England, we want you in Ohio.”
- Kasich in March announced a three-year extension of an agreement initiated in 2015 with West Virginia and Pennsylvania to continue efforts to maximize growth in the shale gas region.
- The capital budget signed by Kasich in March included \$6.1 million to the Ohio Super Computer Center and \$10.2 million for OARnet, the state’s technology network that gives businesses and researchers a competitive advantage in advancing high-tech discoveries.



**42<sup>nd</sup>**

Business Tax Climate Rank Change 2018-2019: -1



**12<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$2,299,112**



**20<sup>th</sup>**

Number of NCRCs: **170,939** | Percent Improvement 2017-2018: **10.6%**



**15<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.4**



**19<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.56**



**5<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
First Solar	Walbridge	Wood	MF	N	Electronics	900	1,000
Cliffs Natural Resources	Toledo	Lucas	MF	N	Metals	700	120
First Solar	Lake Township	Stark	MF	N	Electronics	400	500
Covermymeds	Columbus	Franklin	OF	N	Life Sciences	225	1,000
Homegoods	Warren	Trumbull	DW	N	Consumer Products	160	1,000
Dollar Tree		Morrow	DW	N	Transport & Logistics	132	400
American Electric Power Co.	Groveport	Franklin	DT	N	IT & Comm.	130	17
Walgreen Co.	Perrysburg	Wood	DW	N	Life Sciences	80	350
Kroger Co.	Monroe	Butler	DW	N	Food & Beverage	55	410
O'Reilly Auto Enterprises	Twinsburg	Summit	DW	N	Automotive	45	350
Airstream	Jackson Center	Shelby	MF	E	Automotive	40	280
Festo Ag & Co. Kg	Mason	Warren	MF	E	Machinery, Equip. & Const.	40	350
Bed Bath & Beyond	Monroe	Butler	DW	N	Consumer Products	40	900
Certainteed Corp.	Milan	Erie	MF	E	Machinery, Equip. & Const.	37	10

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

A report from Team NEO says Northeast Ohio is projected to add 20,700 jobs over the next five years, including 8,500 new healthcare openings. Additionally, more than 1 million replacement workers will be needed over the next five years, including 160,000 in office and administrative occupations, and more than 100,000 in production sectors.

The tri-state Cincinnati metro area, with 97 projects, led all metros along the Ohio River corridor in total corporate facility projects tallied over an 18-month period ending in June 2018, according to Site Selection's Conway Projects Database.

Ohio has an agreement with the State of Michigan and Province of Ontario to achieve a 40-percent reduction in the amount of phosphorus entering Lake Erie's western basin by 2025.





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Welcome to Ohio.





**“This budget makes a historic \$400 million dollar investment in housing, makes strides towards affordable healthcare and child care, and matches higher education with the skills employers need.”**

— Gov. Kate Brown, Nov. 2018, announcing her recommended budget for the next biennium

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775 Summer St., NE, #200  
Salem, OR 97301

**Chris Harder**  
DIRECTOR  
503-229-5009

**Oregon4biz.com**

# Oregon

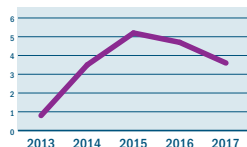
**Pop. (2018):** 4,185,014  
**Median household income:** \$57,902  
**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 1.19%  
**Median age:** 40  
**Right-to-work state:** No

## Legislative Update

- In addition to a new first-time homebuyer savings account program, housing legislation increased the state's document-recording fee from \$20 to \$60 in order to help pay for preserving and developing more affordable rental housing, provide services to veterans and boost programs for the homeless.
- Following the federal tax cut, a measure was passed that prevents businesses reporting overseas profits from receiving an additional state income tax cut as a result.
- A cap-and-trade proposal to curtail carbon emissions and charge the state's largest polluters failed to pass, but is expected to come up again in 2019.

**GDP**  
**25<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$207,712.0**



**7<sup>th</sup>**  
Business Tax Climate Rank Change 2018-2019: **+3**



**26<sup>th</sup>**  
Higher Ed. R&D Expenditure: **\$781,305**



**26<sup>th</sup>**  
Number of NCRCs: **70,724** | Percent Improvement 2017-2018: **8.2%**



**6<sup>th</sup>**  
2018 Workers' Comp Index Rate: **1.15**



**41<sup>st</sup>**  
Lowest Electric Power Cost (cents/kWh): **8.89**



**35<sup>th</sup>**  
Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
De Beers UK/Element Six UK	Gresham	Multnomah	MF	N	Minerals	94	
Qts Realty Trust	Hillsboro	Washington	DT	N	IT & Comm.	26	
Pacific Sea Food Co.	Warrenton	Clatsop	MF	N	Food & Beverage	20	
Medline Industries	Redmond	Deschutes	MF	N	Life Sciences	12	
Oregon Fruit Products	Salem	Marion	MF	E	Food & Beverage	5	
Genentech	Portland	Multnomah	OF	N	Life Sciences		300
Edwards Vacuum	Hillsboro	Washington	MF	N	Machinery, Equip. & Const.		100
Hazelnut Growers Of Oregon	Donald	Marion	MF	N	Food & Beverage		55

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

In a recent Gallup-Sharecare report on well-being, Oregon was one of only two states reporting a drop-in obesity percentage between 2008-2009 and 2016-2017 (-0.7 percent).

A 2017 report from the Oregon Office of Economic Analysis found that median household income in Portland was up 8.7 percent over the previous decade, pushing the area from 32nd highest in the nation to 19th.

The University of Oregon contributes \$2.3 billion to the state economy, and brought in nearly \$122 million in competitive research awards in FY2017-18.

In a speech marking Genentech's 10th anniversary at its facility in Hillsboro that employs more than 400, Gov. Brown said she'd been working with the company for months on a potential expansion and hoped "we all will be able to share very good news soon." A week later, the company announced a new 300-job office in Portland's Lloyd district.

The value of exports from Oregon — one of the most trade-dependent states in the nation — to foreign countries was \$21.9 billion in 2017. The state's largest trading partners are China, Canada, Malaysia, South Korea and Japan.



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*McKenzie River Photo Credit: Mike Shaw*





**“Pennsylvania is blowing most other states out of the water when it comes to production. And by joining every other gas-producing state and passing a severance tax, we could also join them by bringing billions into our own coffers.”**

— Gov. Tom Wolf, February 2018

**Pennsylvania Department of Community & Economic Development**  
400 N. St. 4th Floor  
Harrisburg, PA 17120

**Dennis M. Davin**  
SECRETARY  
1-866-466-3972

**Newpa.com**

# Pennsylvania

**Pop. (2018):** 12,992,598

**Median household income:** \$57,362

**Credit Rating:** A+/Stable

**Pop. growth 2018–2023:** 0.23%

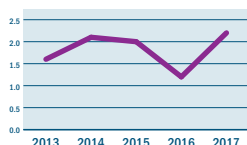
**Median age:** 41

**Right-to-work state:** No

## Legislative Update

- As he has done every year since he was first elected, Gov. Wolf repeated his call for a severance tax on natural gas. The measure passed the House but stalled in the Senate of the Pennsylvania General Assembly, ultimately not becoming part of the state's \$32.7-billion budget he signed in June.
- A new law allows up to 10 new mini-casinos, sports betting, slot machine-style games at truck stops, and online casino-style gambling.
- Funded by a total of \$6 million in funds from the state's jet fuel tax, multimodal fund and local matching funds, 26 airports will make infrastructure and equipment upgrades to maintain safety and expand aviation-related operational and economic opportunities.
- Gov. Wolf in October announced 11 new approvals through the Industrial Sites Reuse Program (ISRP) that will clean up former industrial sites in Allegheny, Berks, Blair, Cumberland, Erie, and Montgomery counties to prepare them for occupation by businesses and residential properties.

**GDP**  
**6<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$700,782.9**



**34<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **+2**



**4<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$4,179,810**



**21<sup>st</sup>**

Number of NCRCS: **35,307** | Percent Improvement 2017-2018: **10.1%**



**34<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.85**



**20<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.60**



**40<sup>th</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
De Beers UK/Element Six UK	Gresham	Multnomah	MF	N	Minerals	94	
Qts Realty Trust	Hillsboro	Washington	DT	N	IT & Comm.	26	
Pacific Sea Food Co.	Warrenton	Clatsop	MF	N	Food & Beverage	20	
Medline Industries	Redmond	Deschutes	MF	N	Life Sciences	12	
Oregon Fruit Products	Salem	Marion	MF	E	Food & Beverage	5	
Genentech	Portland	Multnomah	OF	N	Life Sciences		300
Edwards Vacuum	Hillsboro	Washington	MF	N	Machinery, Equip. & Const.		100
Hazelnut Growers Of Oregon	Donald	Marion	MF	N	Food & Beverage		55

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Pennsylvania's Industrial Resource Centers (part of the national Manufacturing Extension Partnership network) assisted over 830 manufacturers during the fiscal year ending in 2018, enabling \$58 million in operating cost savings; \$733 million in new and retained sales; \$161 million invested in expansion and modernization; and the retention or creation of 5,156 jobs.

The state's Department of Labor and Industry's Apprenticeship and Training Office (ATO), created in 2016, has registered 119 new sponsors and 166 new apprenticeship programs or occupations. As of December, Pennsylvania had 16,286 registered apprentices statewide.

In 2018, the Pennsylvania Industrial Development Authority (PIDA) approved \$82 million in low-interest loans that have resulted in \$118 million in private investment and supported 4,296 created and retained full-time jobs at locations such as the Lawrenceville Chocolate Factory, part of Regional Industrial Development Corporation of Southwestern Pennsylvania's Lawrenceville Technology Center.



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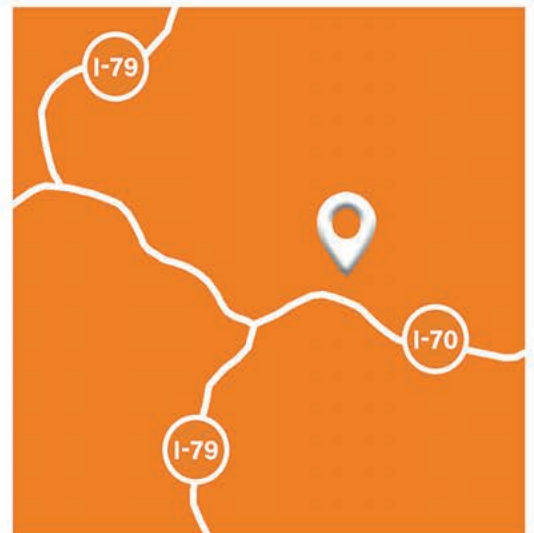
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Jim Winter  
jwinter@hannalwe.com  
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ajpantoni@hannalwe.com  
412.261.2200

ZEDIKERSTATION.COM



**“I’m excited to announce that we have eliminated over 8,000 pages of regulations – over 30 percent of all regulations on the books. Finally we have a regulatory code that saves businesses time and money and eliminates unnecessary red tape.”**

— Governor Gina Raimondo, Oct. 15, 2018, saluting the work led by the state’s Office of Regulatory Reform

**Rhode Island Commerce Corp.**  
315 Iron Horse Way,  
Suite 101  
Providence, RI 02908  
  
Darin Early  
PRESIDENT  
401-278-9100

**commerceri.com**

# Rhode Island

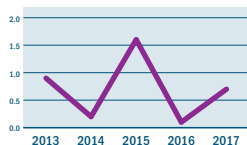
**Pop. (2018):** 1,067,528  
**Median household income:** \$58,972  
**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.21%  
**Median age:** 41  
**Right-to-work state:** No

## Legislative Update

- The \$9.6-billion budget Gov. Raimondo signed in June includes \$11 million to make the Real Jobs RI training program permanent. Since it was created in 2015, Real Jobs has helped connect more than 3,000 Rhode Islanders with job and skills training. The budget also continued the Wavemaker Fellowship program that has helped more than 425 STEM graduates stay in Rhode Island after graduation, and preserved the Qualified Jobs Incentive tax credit program.
- The budget also supports a \$47.3-million Green Economy and Clean Water Bond that will expand Rhode Island’s growing green economy.
- Voters in November approved a measure to borrow \$250 million to repair schools, part of a broader state plan to invest \$1 billion in school infrastructure over the next 10 years.

**GDP**  
**44<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$53,454.0**



**37<sup>th</sup>**  
Business Tax Climate Rank Change 2018-2019: **+1**



**37<sup>th</sup>**  
Higher Ed. R&D Expenditure: **\$331,467**



**42<sup>nd</sup>**  
Number of NCRCS: **1,057** | Percent Improvement 2017-2018: **1.8%**



**43<sup>rd</sup>**  
2018 Workers' Comp Index Rate: **2.19**



**48<sup>th</sup>**  
Lowest Electric Power Cost (cents/kWh): **15.17**



**20<sup>th</sup>**  
Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
De Beers UK/Element Six UK	Gresham	Multnomah	MF	N	Minerals	94	
Qts Realty Trust	Hillsboro	Washington	DT	N	IT & Comm.	26	
Pacific Sea Food Co.	Warrenton	Clatsop	MF	N	Food & Beverage	20	
Medline Industries	Redmond	Deschutes	MF	N	Life Sciences	12	
Oregon Fruit Products	Salem	Marion	MF	E	Food & Beverage	5	
Genentech	Portland	Multnomah	OF	N	Life Sciences		300
Edwards Vacuum	Hillsboro	Washington	MF	N	Machinery, Equip. & Const.		100
Hazelnut Growers Of Oregon	Donald	Marion	MF	N	Food & Beverage		55

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

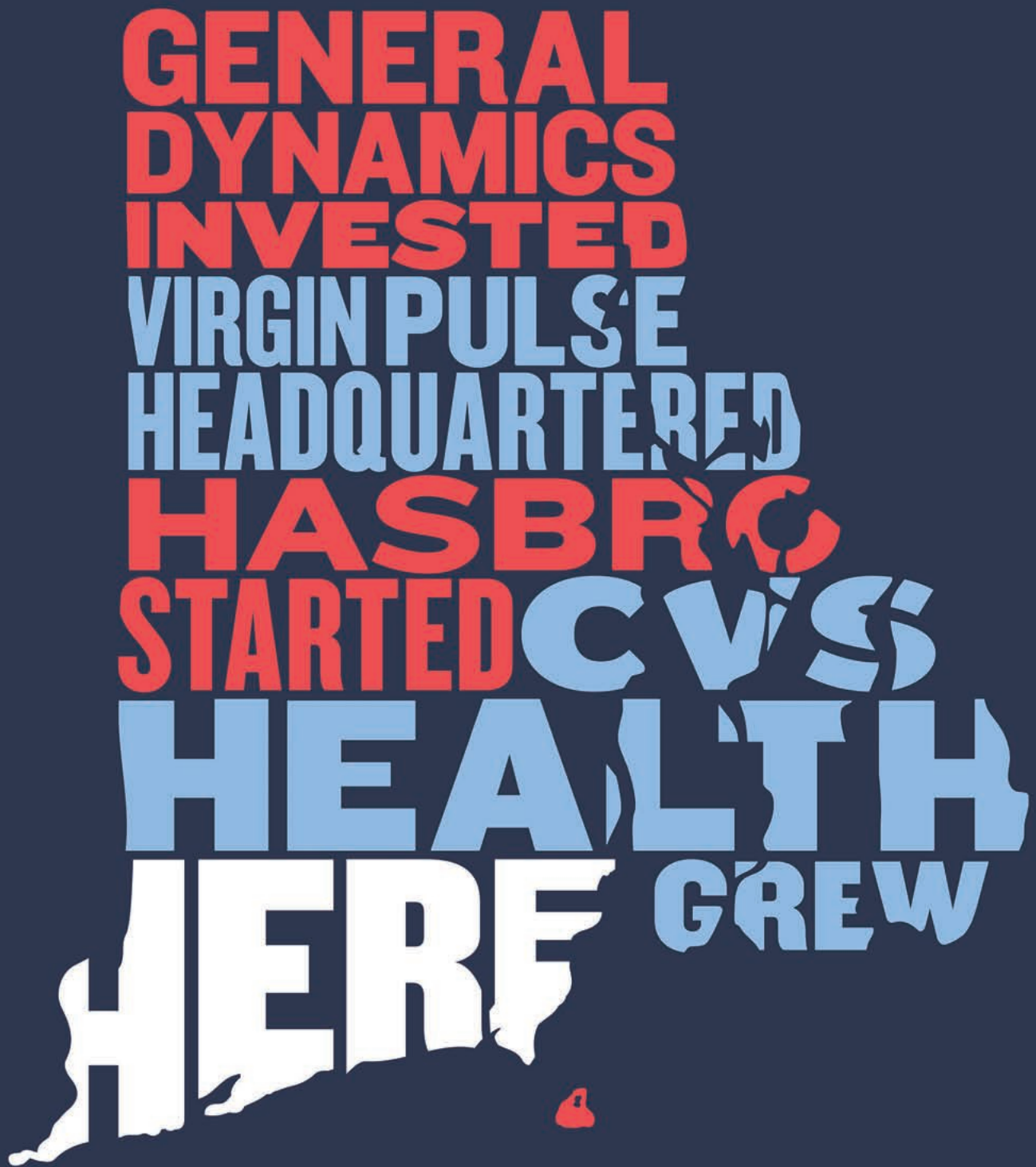
## Did You Know?

Twenty-nine companies have relocated to Rhode Island or expanded their existing operations using the Qualified Jobs Tax Credit Program. The state’s real estate investment programs are investing in over 30 development projects that are creating approximately 10,000 direct and indirect construction jobs and injecting more than \$2 billion of investment.

More than 200 companies employ more than 12,000 people at Quonset Business Park, the 3,200-acre park that was once the Quonset Point Naval Air Station.

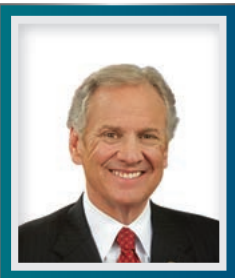
In addition to its commitment to hire 500 American workers in Rhode Island over the next five years at its new hub in the state, India-based BPO firm Infosys is partnering with the Rhode Island School of Design (RISD) to train 1,000 designers across the globe in exploring “new ways of solving complex challenges at the intersection of design, technology and industry.”





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**“Out-of-state union bosses have no interest in the future of South Carolina or this remarkable company. Their presence in North Charleston is about as welcome as a Category 5 hurricane.”**

— Gov. Henry McMaster, May 2018, on the news that the National Labor Relations Board had decided to allow the International Association of Machinists to pursue unionization at the Boeing North Charleston plant

**South Carolina Dept. of Commerce**  
 1201 Main St., #1600  
 Columbia, SC 29201  
**Bobby Hitt III**  
 SECRETARY  
 803-737-0400

[sccommerce.com](http://sccommerce.com)

# South Carolina

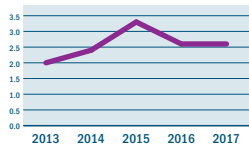
**Pop. (2018):** 5,108,693  
**Median household income:** \$50,748  
**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 1.25%  
**Median age:** 39  
**Right-to-work state:** Yes

## Legislative Update

- Gov. McMaster in March signed a bill reforming the state’s automatic stay proceedings, a measure he and business leaders described as South Carolina businesses from individuals or groups looking to delay construction projects without properly demonstrating legal grounds for doing so. “Businesses moving into our state and creating jobs here want clear expectations and timelines,” said South Carolina Chamber of Commerce President & CEO Ted Pitts. “This legislation provides that clarity while preserving citizens’ rights to challenge government permitting decisions.”
- McMaster in February signed into law a bill protecting South Carolina companies from being found a public or private nuisance if they are following all pertinent laws, licensing regulations and local ordinances. “What we’re doing is making the pre-existing common law even more clear to say that as long as a business is following all the rules and has all the permits and documentation that it needs to have, someone who moves near that plant or facility can’t start complaining that it is there doing what it is licensed to do,” McMaster said.

**GDP**  
**26<sup>th</sup>**



**2017 GDP**  
 (in millions of current US\$)  
**\$199,329.3**



**35<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -3



**27<sup>th</sup>**

Higher Ed. R&D Expenditure: \$699,199



**35<sup>th</sup>**

Number of NCRCs: 439,044 | Percent Improvement 2017-2018: 3.8%



**37<sup>th</sup>**

2018 Workers' Comp Index Rate: 1.95



**14<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): 6.20



**2<sup>nd</sup>**

Fiscal Condition Index Rank



**LAURENS COUNTY**  
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- Over 40 Cargo/Freight carriers within a 60-mile radius of Laurens County
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— Gov. Phil Scott, March 2018, on the debut of the Stay-to-Stay initiative, a new economic development tourism program

**Agency of Commerce & Cmty. Dev.**  
 Dept. of Economic Development  
 Deane C. Davis Bldg., 6th Fl.  
 1 National Life Dr.  
 Montpelier, VT 05620  
**Joan Goldstein**  
 COMMISSIONER  
 802-272-2399

[Accd.vermont.gov](http://Accd.vermont.gov)

# Vermont

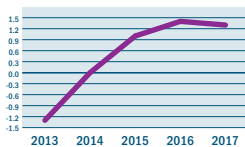
**Pop. (2018):** 643,518  
**Median household income:** \$57,396  
**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 0.25%  
**Median age:** 43  
**Right-to-work state:** No

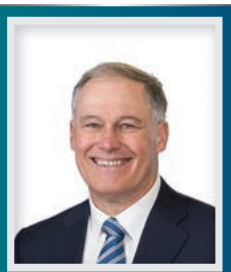
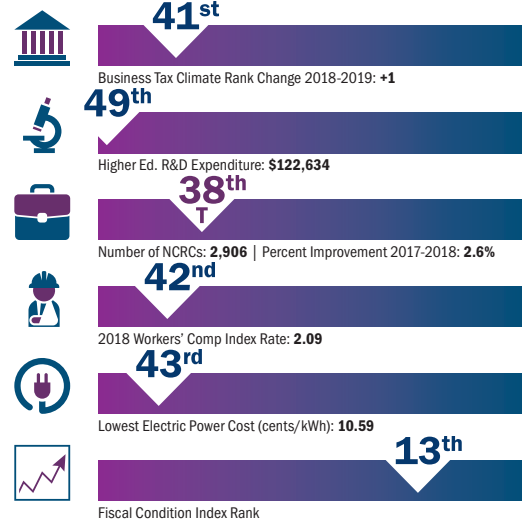
## Legislative Update

- A new remote worker measure goes into effect January 1, 2019, that offers remote workers relocating to Vermont reimbursement grants of up to \$5,000 per year. The program is budgeted for \$125,000 in 2019, and double that amount in 2020.
- A budget went into effect without Gov. Scott's signature in June in part because of his opposition to its 4.5-cent hike in non-residential property taxes (despite a state surplus that in mid-year had reached \$55 million). Meanwhile, the Working Family Taxpayer Protection Act lowered state income tax rates for all taxpayers.
- New legislation allows for the creation of an "affiliate reinsurance company" and allows for a more favorable reinsurance alternative for U.S. companies who conduct business offshore and are looking to return to the U.S. after federal tax changes created the Base Erosion Anti-Abuse Tax (BEAT) on reinsurance ceded to offshore affiliates. "More than \$35 billion previously in offshore jurisdictions will now be looking for a home in the U.S. to avoid this tax," the state said.

**GDP**  
**50<sup>th</sup>**



**2017 GDP**  
 (in millions of current US\$)  
**\$29,566.6**



**"Amazon's expansion here in Washington state includes advertising for almost 6,800 open positions in and around Seattle HQ and another 2 million square feet of real estate in the Seattle area — bringing their total current footprint to more than 10 million square feet."**

— Gov. Jay Inslee, Nov. 13, 2018, in "congratulating" New York City and Northern Virginia on their Amazon HQ2 investments

**Washington State Dept. of Commerce**  
 2001 Sixth Ave.,  
 Suite 2600  
 Seattle, WA 98121  
**Brian Bonlender**  
 DIRECTOR  
 206-256-6100

[choosewashingtonstate.com](http://choosewashingtonstate.com)

# Washington

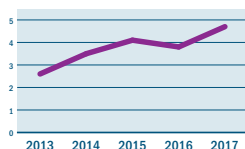
**Pop. (2018):** 7,452,102  
**Median household income:** \$68,734  
**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 1.30%  
**Median age:** 38  
**Right-to-work state:** No

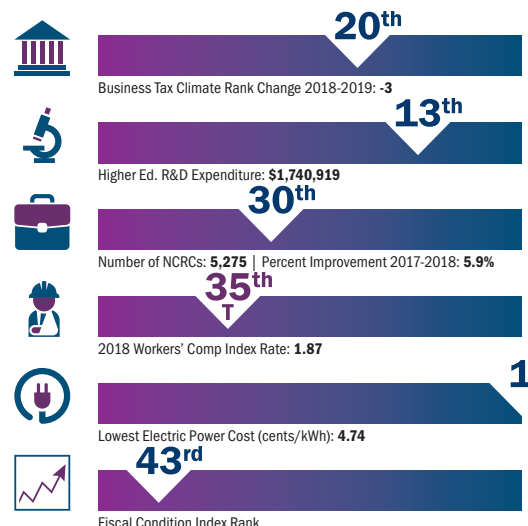
## Legislative Update

- Voters in November rejected a ballot measure that would have made Washington the first state to institute a carbon fee on fossil-fuel emissions, at the rate of \$15 per metric ton, on "large emitters," ranging from companies that sell gas to consumers to utilities to refineries and natural gas distributors.
- As documented by the Cato Institute, most of Gov. Inslee's proposed tax hikes for the 2017-2019 biennium did not advance in the legislature, but he "did sign into law an increase in the state property tax and online sales tax to raise \$1.5 billion annually. He also vetoed legislation to reduce the business and occupation tax rate."
- In is budget for the 2019-2021 biennium, Inslee seeks a new capital gains tax on the sale of stocks, bonds and other assets; an increase in the state business and occupation tax on services; and a change in the state's real estate excise tax from to a progressive graduated rate that would lower the tax on sales of lower-value properties and increase it for sales of properties valued at \$1 million or more.

**GDP**  
**12<sup>th</sup>**



**2017 GDP**  
 (in millions of current US\$)  
**\$480,909.9**





**“There’s a lack of skilled tradesmen and women across the state. We started a trade school in my company 10 years ago and put 1,000 people through it. I do want to do that in high schools.”**

— Gov.-elect Bill Lee, speaking to the Greater Memphis Chamber, Dec. 6, 2018 (source: per NBC affiliate WMC)

Tennessee Dept. of Econ. & Cmty. Dev.  
312 Rosa L. Parks Ave., 11th Fl.  
Nashville, TN 37243

Bob Rolfe  
COMMISSIONER  
615-741-1888

tn.gov/ecd

# Tennessee

Pop. (2018): 6,818,402

Median household income: \$49,776

Credit Rating: AAA/Stable

Pop. growth 2018–2023: 0.89%

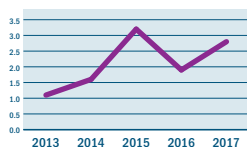
Median age: 39

Right-to-work state: Yes

## Legislative Update

- Among the details from a budget summary session report from the 110th General Assembly: Economic and Community Development received \$133.2 million in additional funding to address infrastructure and job training, rural development and broadband accessibility grants. A bond authorization of \$30.7 million is authorized for wastewater improvements at the Memphis Regional Megasite.
- Transportation is given authority to use \$10 million from the Transportation Equity Fund to address short line railroad repairs, improvements and upgrades in consultation with the Short Line Railroad Alliance. And the Aeronautics Development fund is appropriated \$20 million for grants.
- Amendments to the appropriation bill include \$3 million to enhance the engineering department at Tennessee Technological University in Cookeville.

GDP  
**19<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$315,146.7**



**16<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: -2



**21<sup>st</sup>**

Higher Ed. R&D Expenditure: \$1,183,795



**34<sup>th</sup>**

Number of NCRs: 122,464 | Percent Improvement 2017-2018: 4.0%



**19<sup>th</sup>**

2018 Workers' Comp Index Rate: 1.52



**9<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): 5.85



**22<sup>nd</sup>**

Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Fedex	Memphis	Shelby	DW	E	Transport & Logistics	1,000	
Amazon.com	Nashville	Davidson	OF	N	Electronics	623	5,000
Bridgestone Americas	Nashville	Davidson	HQ	N	Chemicals & Plastics	514	600
St. Jude Children's Research Hospital	Memphis	Shelby	RD	N	Life Sciences	412	
Nokian Tyres	Dayton	Rhea	MF	N	Chemicals & Plastics	360	400
Asurion	Nashville	Davidson	HQ	N	Business & Fin. Services	288	400
Electrolux North America	Springfield	Robertson	MF	E	Electronics	250	
Denso Corp.	Athens	McMinn	MF	E	Automotive	190	320
Atlasbx Co.	Clarksville	Montgomery	MF	N	Electronics	75	200
Alliancebernstein	Nashville	Davidson	HQ	N	Business & Financial Services	70	1,000
Heraeus Metals Germany GmbH & Co. Kg	Wartburg	Morgan	MF/DW	E	Waste Mgmt	70	190

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Tennessee tied for fifth place with South Carolina in Site Selection's November 2018 Business Climate rankings, which incorporated the state's No. 5 finish in those rankings' executive survey component.

Celebrating its 75th anniversary in 2018, Oak Ridge National Laboratory (ORNL) is “a difference maker in getting companies to locate in Tennessee,” ORNL Director Dr. Thomas Zacharia told Site Selection's Ron Starner for a Conway Custom Content publication for Knoxville-Oak Ridge | Innovation Valley. “People are amazed at the capabilities we have. Companies don't have to pay for a standing army of 4,000 of the smartest people on the planet.”

More than 919 automotive parts suppliers are located in Tennessee, where the number of automotive employees is 3.3 times the national average.



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**Bo Fulk**

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**Shanna Markwell**

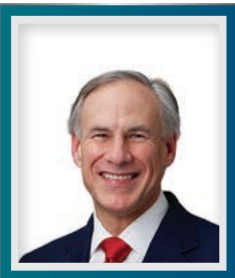
+1 615 928 5243

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**Perry Wolcott**

+1 615 928 5262

[perry.wolcott@am.jll.com](mailto:perry.wolcott@am.jll.com)



**“I’ve asked other CEOs who have broken ground on new headquarters and have moved to Texas from other states, why are they doing this? They all say the same thing, which is Texas has a top-notch workforce.”**

— Gov. Greg Abbott, interviewed by Site Selection Editor in Chief Mark Arend as Texas earned its sixth straight Governor’s Cup, March 2018

**Texas Economic Development Corporation**  
221 East 11th Street,  
4th Floor  
Austin, TX 78701

**Robert Allen**  
PRESIDENT/CEO  
512-981-6736

**Businessintexas.com**

# Texas

**Pop. (2018):** 28,954,616

**Median household income:** \$57,286

**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 1.65%

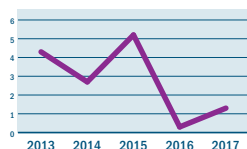
**Median age:** 35

**Right-to-work state:** Yes

## Legislative Update

- In December remarks in Austin following that city’s winning a new \$1-billion corporate campus project from Apple, Gov. Abbott lauded a state business environment “that keeps taxes low, ensures regulations are predictable and kept in check, and minimizes frivolous lawsuits through sensible litigation reform. This session we have an opportunity to do even more by reining in property taxes and reforming our school finance system, further incentivizing businesses and job creators to invest in Texas.”
- The state’s regular session occurs in January of odd-numbered years. By noon on the first day of bill pre-filing in November, more than 400 bills had been filed, including one measure to reduce and gradually eliminate the state’s franchise tax, and a measure to do away with daylight savings time.

**GDP**  
**2<sup>nd</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$1,615,555.2**



**15<sup>th</sup>**  
Business Tax Climate Rank Change 2018-2019: -2



**3<sup>rd</sup>**  
Higher Ed. R&D Expenditure: **\$5,495,483**



**17<sup>th</sup>**  
Number of NCRCs: **27,046** | Percent Improvement 2017-2018: **13.6%**



**9<sup>th</sup>**  
2018 Workers' Comp Index Rate: **1.21**



**5<sup>th</sup>**  
Lowest Electric Power Cost (cents/kWh): **5.40**



**8<sup>th</sup>**  
Fiscal Condition Index Rank

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Bayport Polymers	Port Arthur	Jefferson	MF	N	Energy	1,700	60
Big River Steel	Brownsville	Cameron	MF/DW	N	Metals	1,600	
Apple	Austin	Travis	HQ/RD	N	IT & Comm.	1,000	5,000
Cyrusone	Allen	Collin	DT	N	IT & Comm.	600	
Yara International ASA/BASF	Freeport	Brazoria	MF	N	Chemicals & Plastics	600	
Union Pacific Corp.	Hearne	Robertson	DW	E	Transport & Logistics	550	
Bitmain Technologies	Rockdale	Milam	DT	N	IT & Comm.	500	400
Google	Midlothian	Ellis	DT	N	IT & Comm.	500	40
Novus International/Arkema Delaware	Beaumont	Jefferson	MF	E	Food & Beverage	400	19
Digital Realty	Garland	Dallas	DT	E	IT & Comm.	400	
Innergex Renewable Energy		Winkler	MF	N	Electronics	400	
Equistar Chemicals	Channelview	Harris	MF	N	Chemicals & Plastics	356	18
American Airlines Group	Fort Worth	Tarrant	HQ	N	Transport & Logistics	300	

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

A 2017 report from NASA said more than \$2 billion of Johnson Space Center’s total budget of \$4.42 billion is spent on contracts and federal salaries in Texas. Among NASA expenditures in the state: \$108 million with small businesses, \$18.3 million with universities and \$62 million with women-owned firms. The center employs nearly 11,000 combined federal staff and contractors.

A report from NAIOP – the National Association of Industrial and Office Properties – found that Texas led all states in 2017 in total direct development impact on GDP. The total value of direct construction spending in Texas that year on office, industrial, warehouse and retail combined was \$24.38 billion, while total output was \$58.9 billion. Texas also created and supported the most jobs generated by commercial real estate construction, at 379,781.

Site Selection’s November 2018 ranking of U.S. Foreign-Trade Zones (based on an index that tallied performance in merchandise received and exported; numbers of warehouse and production operations; and value of production exports) ranked Zone No. 84 in Harris County (Houston), No. 1; Zone No. 16 in Port Arthur No. 2; and Zone No. 122 in Corpus Christi No. 6.





# THIS IS WHY CEDAR HILL

*"We're excited about the future of downtown Cedar Hill. It's got this great grid that has been developed over a long period of time when the city was formed, but there's a lot of vacant land. We'll not only preserve some buildings that existed before but also build new.*

*The project will bring massive square footage for dining, retail & office, coupled with a unique work-live component that'll bring opportunity for smaller entrepreneurs to do business and work in the same place.*

*Construction will begin in Mid-2019. We're looking forward to being an addition to what already exists in beautiful Cedar Hill, Texas."*

*Jim & Amanda Lake  
Lake Moreno Partners*



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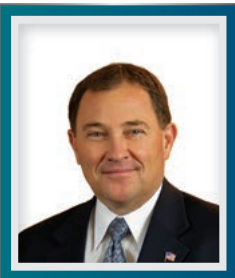
## LAND OF OPPORTUNITY

Just 20 minutes from Downtown Dallas sits the beautiful, family-friendly city of Cedar Hill, where opportunities grow naturally. A bustling, and diverse community of just over 45,000 people, Cedar Hill combines the best of big city living with natural beauty and outdoor recreation found nowhere else in the Dallas-Fort Worth Metro-area.

In Cedar Hill, we are serious about doing business, which is why we offer aggressive economic development incentives. Come take a look for yourself and see why there's greener pastures in the City of Cedar Hill, Texas.







**“With all this prosperity, we need to plan strategically to combat the challenges of our own success. The \$19-billion budget for Fiscal Year 2020 that I have proposed addresses growth-related challenges and focuses on maintaining and even improving our already high quality of life.”**

— Gov. Gary Herbert, Dec. 2018

**Econ. Dev. Corp. of Utah**  
201 S. Main St.,  
Suite 2150  
Salt Lake City, UT 84111

Theresa Foxley  
CEO  
801-328-8824

[edcutah.org](http://edcutah.org)

# Utah

**Pop. (2018):** 3,183,796  
**Median household income:** \$66,683  
**Credit Rating:** AAA/Stable

**Pop. growth 2018–2023:** 1.73%  
**Median age:** 31  
**Right-to-work state:** Yes

## Legislative Update

- In response to the business-backed Our Schools Now ballot initiative to increase sales and income taxes by a combined \$700 million to fund education, a last-minute compromise enacted a five-year freeze on the statewide property tax rate, and put a non-binding question regarding a 10-cent gas tax hike on the ballot, which voters rejected in November.
- A new measure creates the Utah Inland Port Authority, with the goal of establishing such a port and an accompanying U.S. Foreign-Trade Zone near Salt Lake City International Airport.
- The Utah Transit Authority has been restructured and renamed the Transit District of Utah, and given more leeway, with administrative approval, to use highway funds for other transit projects.



**8<sup>th</sup>**  
Business Tax Climate Rank Change 2018-2019: **0**



**29<sup>th</sup>**  
Higher Ed. R&D Expenditure: **\$611,015**



**38<sup>th</sup>**  
Number of NCRCs: **4,101** | Percent Improvement 2017-2018: **2.6%**



**5<sup>th</sup>**  
2018 Workers' Comp Index Rate: **1.06**

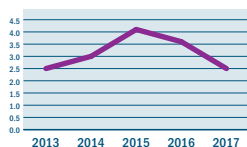


**10<sup>th</sup>**  
Lowest Electric Power Cost (cents/kWh): **5.90**



**39<sup>th</sup>**  
Fiscal Condition Index Rank

**GDP**  
**31<sup>st</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$150,054.9**

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Facebook	Eagle Mountain	Utah	DT	N	IT & Comm.	750	30
L C Bullfrog International	Bluffdale	Salt Lake	HQ	E	Chemicals & Plastics	20	150
Lendingclub Corp.	Lehi	Utah	OF	N	Business & Financial Services	18	860
Essence Global	Salt Lake City	Salt Lake	OF	N	Business & Financial Services	3.1	125
Aligned Energy	Salt Lake City	Salt Lake	OF/MF/DT	N	IT & Comm.		
Innovasis	Salt Lake City	Salt Lake	MF/HQ/RD	N	Life Sciences		
Kenworth Sales Co.	Saint George	Washington	DW	N	Automotive		6
Pluralsight	Draper	Salt Lake	HQ	N	IT & Comm.		
CVB	Nibley	Cache	HQ	E	Textiles		

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

The 2018 Economic Report to the Governor from the David Eccles School of Business at the University of Utah and the Governor's Office of Management and Budget found that every major industrial sector expanded in 2017, contributing a total of 43,500 new jobs over the year.

Among the report's other findings, net immigration of almost 27,000 in 2017 was the most since 2006 and contributed to 46 percent of the state's total population growth.

The Sundance Film Festival generated \$191.6 million in economic activity for the state of Utah and created \$100 million in wages for Utahans, according to a report from Y2 Analytics.

“Propelled by the enthusiasm of 10-year-old Kenyon Roberts, the Legislature passed a bill to name the Utahraptor as the state's official dinosaur,” the Salt Lake Tribune reported. “To avoid a fight, the Utahraptor does not supplant the Allosaurus, which is Utah's state fossil.”



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**“The Commonwealth’s data center industry is one of the strongest in the nation, and Facebook’s decision to make a second substantial investment in Henrico County less than a year after its first announcement speaks volumes about the quality of our workforce, IT infrastructure, and business climate.”**

— Gov. Ralph Northam, September 26, 2018, on Facebook’s decision to invest \$750 million near Richmond at the site where the company announced a \$1-billion investment in 2017

Virginia Econ. Dept. Partnership  
901 E. Cary St.  
Richmond, VA 23219  
Stephen Moret  
PRESIDENT/CEO  
804-545-5600

yesvirginia.org

# Virginia

Pop. (2018): 8,566,397

Median household income: \$68,682

Credit Rating: AAA/Stable

Pop. growth 2018–2023: 0.83%

Median age: 39

Right-to-work state: Yes

## Legislative Update

- A new law establishes an income tax modification for companies that, from 2018 through 2024, either a) invest at least \$5 million in new capital investment in a qualified locality and create at least 10 jobs paying at least 150 percent of the minimum wage in a qualified locality or b) create at least 50 jobs paying at least 150 percent of the minimum wage in a qualified locality. A company is eligible to claim the modification only if it had no property or payroll in Virginia on the effective date of the act. The bill also authorizes grants and loans of up to \$2,000 per job per year from the Commonwealth’s Development Opportunity Fund to an eligible company.
- Launched in June, Build Virginia connects workers with training and employment opportunities in the skilled trades. With an initial focus on the shipbuilding industry, it will ultimately include resources relating to other growing industries such as construction and advanced manufacturing.



22<sup>nd</sup>

Business Tax Climate Rank Change 2018-2019: 0



14<sup>th</sup>

Higher Ed. R&D Expenditure: \$1,551,003



7<sup>th</sup>

Number of NCRs: 19,172 | Percent Improvement 2017-2018: 29.6%



10<sup>th</sup>

2018 Workers’ Comp Index Rate: 1.28



23<sup>rd</sup>

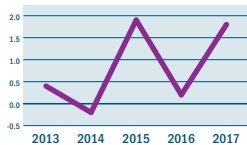
Lowest Electric Power Cost (cents/kWh): 6.83



30<sup>th</sup>

Fiscal Condition Index Rank

GDP  
13<sup>th</sup>



2017 GDP  
(in millions of current US\$)  
\$463,564.3

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Micron Technology	Manassas	City of Manassas	MF	E	Electronics	3,000	1,100
Amazon.Com	Arlington	Arlington	HQ	N	Electronics	2,500	25,000
Coresite Realty Corp.	Reston	Fairfax	DT	N	IT & Comm.	500	
Cascades	Ashland	Hanover	MF	N	Paper, Printing & Packaging	275	140
Sentinel Data Centers	Ashburn	Loudoun	DT	N	IT & Comm.	214	
Bcause	Virginia Beach	City of Virginia Beach	DT	E	Business & Financial Services	100	100
Pointone Development Corp.	Virginia Beach	City of Virginia Beach	DT	N	IT & Comm.	80	
Aldi Stores		City of Petersburg	DW/HQ	N	Food & Beverage	57	120
Assured Communications							
Advisors International	Virginia Beach	City of Virginia Beach	DT	N	IT & Comm.	52	30
DowDupont	Richmond	City of Richmond	MF	E	Chemicals & Plastics	50	

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Even before Amazon announced that Crystal City in Arlington would get half of its two-city HQ2 investment and 25,000 new jobs, the company’s presence in Virginia was substantial: A total of 8,500 Amazon full-time employees work at six fulfillment and sort centers, three Prime Now hubs, six solar facilities, several large data centers, and the East Coast campus of Amazon Web Services.

In the 20 years U.S. News & World Report has ranked public universities as a separate category, the University of Virginia has ranked in the top three every year. Employing 16,788 faculty and staff and 12,000 health system staff, UVA was found in a 2016 study to have an overall \$5.9-billion economic impact on the Commonwealth.

According to a 2017 economic impact study, production agriculture employs nearly 54,000 farmers and workers in Virginia and generates approximately \$3.8 billion in total output. In addition, value-added industries (those that depend on farm commodities) employ more than 69,000 workers.



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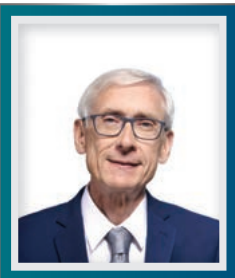
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**“People aren’t asking for handouts like Foxconn. They’re just asking for a loan.”**

— Gov.-elect Tony Evers, June 2018 in the La Crosse Tribune, on his plan to localize economic development resources and efforts.

**Wisconsin Econ. Dev. Corp.**  
201 W. Washington Avenue  
Madison, WI 53703

Mark Hogan  
CEO  
855-469-4249

**Inwisconsin.com**

# Wisconsin

**Pop. (2018):** 5,847,633

**Median household income:** \$57,408

**Credit Rating:** AA/Stable

**Pop. growth 2018–2023:** 0.39%

**Median age:** 40

**Right-to-work state:** Yes

## Legislative Update

- A \$6.8-million mobile job center is part of a comprehensive talent attraction package (Assembly Bill 811) the Wisconsin Economic Development Corporation (WEDC) will coordinate with DWD and the Departments of Tourism and Veterans Affairs to recruit and retain workers. The program focuses on millennials, veterans, and University of Wisconsin System alumni.
- Among other measures: Funding for Wisconsin Fast Forward training grants was increased by \$11.5 million. Funding for expanding broadband access was increased by \$35.5 million to \$41.5 million. Tax measures include a new \$100-per-child tax rebate, and elimination of the state levied property tax.
- After the election of Democrat Tony Evers to the governorship, Republican legislators took steps in a special session in December to limit various aspects of the governor’s office’s authority, including a measure to delay his plans to dissolve and reconstitute the Wisconsin Economic Development Corp.



**32<sup>nd</sup>**

Business Tax Climate Rank Change 2018-2019: **+3**



**15<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$1,503,746**



**46<sup>th</sup>**

Number of NCRCs: **184,215** | Percent Improvement 2017-2018: **1.4%**



**40<sup>th</sup>**

2018 Workers' Comp Index Rate: **2.02**



**33<sup>rd</sup>**

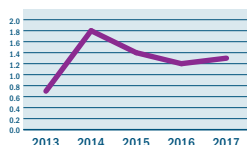
Lowest Electric Power Cost (cents/kWh): **7.74**



**6<sup>th</sup>**

Fiscal Condition Index Rank

**GDP**  
**21<sup>st</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$292,270.1**

## Selected Corporate Facility Projects 2018

COMPANY	CITY	COUNTY	TYPE	NEW/ EXPANDED	PRODUCT	INVESTMENT (US\$ M)	EMP
Green Bay Packaging Inc.	Green Bay	Brown	MF	N	Paper, Printing & Packaging	475	200
Amazon.com, Inc.	Oak Creek	Milwaukee	DW	N	Electronics	200	1,500
Promega Coporation	Fitchburg	Dane	RD	N	Life Sciences	190	100
WSBCP, LLC	Waupun	Fond du Lac	MF	N	Food & Beverage	150	40
Harris BMO Bank National Association/ Michael Best and Friedrich LLP	Milwaukee	Milwaukee	HQ	N	Business & Financial Services	133	
Allegheny Technologies, Inc.	Cudahy	Milwaukee	MF	E	Metals	95	125
Great Lakes Cheese Co., Inc.	Wausau	Marathon	MF	N	Food & Beverage	95	
ATI Ladish LLC	Cudahy	Milwaukee	MF	E	Metals	88	125
UAS Laboratories LLC	Wausau	Marathon	MF	N	Life Sciences	61	75
Exact Sciences Corporation	Madison	Dane	HQ	N	Life Sciences	60	
S. C. JOHNSON & SON, INC.	Racine	Racine	HQ	E	Chemicals & Plastics	50	
J. W. Speaker Corporation	Germantown	Washington	HQ	E	Automotive	46	100
Gulfstream Aerospace Corporation	Appleton	Outagamie	OF, MF, DW	N	Aerospace	40	200
Oshkosh Corporation	Oshkosh	Winnebago	HQ	N	Automotive	40	200
Lakeside Foods, Inc.	Manitowoc	Manitowoc	DW	E	Food & Beverage	40	40

DT = Data Center | MF = Manufacturing | OF = Office | HQ = Headquarters | RD = Research & Development | DW = Distribution/Warehouse

## Did You Know?

Planned for more than 20 million sq. ft., the Foxconn campus in Mount Pleasant will be large enough to hold 11 Lambeau Fields. It will become one of the largest manufacturing campuses in the world.

The dairy industry contributes \$43.4 billion to the Wisconsin economy.

State unemployment dropped to a new all-time low of 2.8 percent in April 2018.



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**“Tourism needs to be a cornerstone of our economy, and it’s great to see it growing again.”**

— Gov. Jim Justice, September 2018, on the news that West Virginia tourism spending grew by nearly 4 percent, after dropping by 14 percent over the previous five years

**West Virginia Development Office**  
1900 Kanawha Blvd. E  
Charleston, WV 25305  
  
Kris Hopkins  
EXECUTIVE DIRECTOR  
304-558-2234

[Westvirginia.gov](http://Westvirginia.gov)

# West Virginia

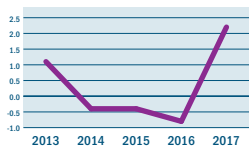
**Pop. (2018):** 1,895,717  
**Median household income:** \$43,555  
**Credit Rating:** AA-/Stable

**Pop. growth 2018–2023:** 0.15%  
**Median age:** 43  
**Right-to-work state:** Yes

## Legislative Update

- A measure legalized sports wagering, with the first weekend of betting taking place in September and netting the state around \$29,000.
- A new law eliminates the state film tax credit.
- After signing two executive orders establishing a regulatory moratorium and regulatory review, Gov. Justice in April signed another one expediting the process for all permits and prioritizing permits for projects of critical economic concern.
- Gov. Justice in July created a Blue Ribbon Commission to review, study and assess the current state of four-year higher education institutions in West Virginia.
- An October release said that, since October 2017, when voters approved the Roads to Prosperity road and bridge improvement program, 286 projects costing \$98.7 million and covering 691 miles have been completed, with another seven projects totaling more than \$352 million in various stages of work.

**GDP**  
**40<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$70,564.7**



**19<sup>th</sup>**

Business Tax Climate Rank Change 2018-2019: **+1**

**42<sup>nd</sup>**

Higher Ed. R&D Expenditure: **\$210,259**

**40<sup>th</sup>**

Number of NCRCs: **67,458** | Percent Improvement 2017-2018: **2.4%**



**4<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.01**



**16<sup>th</sup>**

Lowest Electric Power Cost (cents/kWh): **6.29**



**26<sup>th</sup>**

Fiscal Condition Index Rank



**“We were literally built around the pursuit of the American Dream – the idea that every single person should have the opportunity to achieve success through hard work and determination. At our core, I believe these are the values that still connect each and every one of us in Wyoming – independence, grit, and self-reliance.”**

— Gov.-elect Mark Gordon, Nov. 8, 2018

**Wyoming Business Council**  
214 W. 15th St.  
Cheyenne, WY 82002  
  
Shawn Reese  
CEO  
307-777-2800

[wyomingbusiness.org](http://wyomingbusiness.org)

# Wyoming

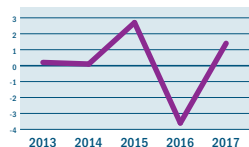
**Pop. (2018):** 600,692  
**Median household income:** \$58,486  
**Credit Rating:** AA+/Stable

**Pop. growth 2018–2023:** 0.58%  
**Median age:** 38  
**Right-to-work state:** Yes

## Legislative Update

- Among around \$40 million in economic development funding went toward enhancing high-speed broadband in the state and, via the Kickstart program, providing seed money for entrepreneurs to create businesses in the state. These and other components providing workforce training and supporting blockchain and virtual currency innovation are all under the 20-year strategy known as ENDOW (Economically Needed Diversity Options for Wyoming).
- Under ENDOW, a total of \$15 million will support Wyoming Department of Transportation’s (WYDOT) 10-year Commercial Air Service Plan (CASP), enabling WYDOT’S Aeronautics Division to contract with one airline to provide service to a major hub airport, such as Denver or Salt Lake City. “Commercial air service is a significant limiting factor to expanding and diversifying Wyoming’s economy,” said a state report, noting that Wyoming fares are 28 percent higher than the national average.

**GDP**  
**49<sup>th</sup>**



**2017 GDP**  
(in millions of current US\$)  
**\$38,684.5**



**1<sup>st</sup>**

Business Tax Climate Rank Change 2018-2019: **0**

**47<sup>th</sup>**

Higher Ed. R&D Expenditure: **\$125,032**

**31<sup>st</sup>**

Number of NCRCs: **9,487** | Percent Improvement 2017-2018: **4.5%**



**35<sup>th</sup>**

2018 Workers' Comp Index Rate: **1.87**



**22<sup>nd</sup>**

Lowest Electric Power Cost (cents/kWh): **6.80**



**5<sup>th</sup>**

Fiscal Condition Index Rank





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## A Blueprint for Airport & Regional Growth

**A**mazon's recent selection of Nashville for its 5,000-job Operations Center of Excellence is only the latest contributor to the Metro's booming economy and population growth. Conservative estimates put metro Nashville's population at 2.5 million by 2035. It's about 1.75 million today. That's where BNA Vision comes in. Launched in 2016, BNA Vision is a comprehensive plan designed to enable Nashville International Airport (BNA) to accommodate the region's booming population growth and meet the needs of the airport's record-breaking passenger increases.

Following is a mid-December conversation with Nashville International Airport (BNA) President and CEO Doug Kruegen, who explains the airport's role in the region's prosperity today and how it will keep pace with its growth in the years to come.

### How does BNA leadership define its role in metro-area economic development?

**Doug Kruegen:** Nashville International Airport (BNA) is a major economic engine for the

greater Nashville economy. This region has seen substantial population and economic growth, and the airport both fosters and accommodates those trends. We're a significant employer, of course, but that's really just a portion of the impact. From businesses within the airport footprint, to the many subsidiary enterprises that rise up and benefit from airport activities, BNA is critical to our economic landscape.

The hospitality industry is a key part of our economy. Music City is a top destination for tourists and convention travelers, many of whom fly in and out of BNA. Moreover,

business travelers rely heavily on our airport to get them to the places they need to go in the least amount of time. An airport is only as strong as the nonstop service it can provide. We work hard to make sure we provide nonstop service to the destinations that our passengers need and want. Typically, the availability of air service is one of the top questions asked by businesses looking to relocate or expand, and we take that responsibility seriously. Nashville is an emerging corporate center and, combined with the hospitality scene, having a great airport is key to keeping it that way.

by **MARK AREND**

mark.arend@siteselection.com



### To what extent did the Nashville business community weigh in on the BNA Vision plan formation?

**DK:** The entire BNA Vision plan was developed with the needs of our passengers in mind, both business and leisure. We frequently reach out to the business community to understand their travel needs, be it new routes, parking packages or terminal-based facilities. Passenger traffic at BNA is growing at an unprecedented rate, and it was critical that dramatic changes were made now to prepare for what was on the horizon. Nashville is accustomed to an easy and efficient airport — one that is warm and welcoming, like Nashville itself. It is something we promote and in which we take much pride. We don't want to lose that, so our expansion — BNA Vision — is very consciously designed to include those characteristics that have traditionally made our airport enjoyed by our passengers and embraced by our community. BNA Vision has been well received by our business community, and excitement is continually growing as we make more and more progress.

### Airports frequently are visitors' and corporate site selectors' first (and last) impression of the city. What will they experience when BNA Vision is fully implemented that will differentiate Nashville from comparably sized markets?

**DK:** Like Nashville itself, BNA has long been known for its accessibility and friendliness, and for the music, art and food offerings that define our culture. Our challenge is to keep BNA distinctive in the face of rapid growth. Ultimately, our mission is to be known as the premier airport for all travelers. With BNA Vision, we're taking all of the best things about our airport and adding even more with bigger and better facilities, more air service to more destinations and more amenities.

Our revamped concessions program is a prime example of how we're growing and changing. Working with our partners at Fraport USA, our new concessions program will roll out in 2019 and will embody the best of Nashville with an emphasis on local flavors and fare, including street pricing, that will fully embrace our renowned culinary scene. The look of the airport's interior will be updated and upgraded to reflect Nashville in a visual way, drawing

inspiration from the authentic craftsmanship of musical instruments and the region's scenic beauty.

Of course, we're Music City, and BNA will continue to represent that brand in a way that no one else can match. We'll continue to have live music and visual arts installations in several locations throughout the terminal. From the moment you get off the plane, you'll know you're in Nashville, and you'll be glad you're here. And when travelers think about the airports they fly into, we want them to think of BNA as the best. Entertaining, welcoming and easy.

### What are some examples of how BNA will facilitate regional economic development when expansion projects are complete?

**DK:** BNA is and has been one of the fastest growing airports in North America. The number of passengers in our terminal has grown by more than 1 million people each year for the past five years, and all projections indicate continued growth as far as the eye can see. This year, we had roughly 16 million passengers flying in and out of BNA, an extraordinary increase of about 13 percent over last year. By the time BNA Vision is complete in 2023, we anticipate more than 17 million passengers visiting our airport. That number continues to soar as we project long term.

What we're doing with BNA Vision is building capacity to meet those growing needs, especially on our land side. We think an increase in international service is highly likely in the years to come as Nashville receives more and more world-wide interest. This will come from both the leisure and business markets. With that in mind, BNA Vision includes a state-of-the-art International Arrivals Facility to accommodate that specific growth. Without a doubt, a major increase in international flights will significantly contribute to the region's economic profile. More air service means even more visitors to Nashville for business and leisure travel, which means more money spent in our hotels, restaurants and attractions. An efficient airport is the cornerstone of the continued growth and expansion of Nashville. As we say at BNA, "Buckle up. We're taking off." ▼



Doug Kruelen



This Investment Profile has been prepared under the auspices of Nashville International Airport. For more information, visit [BNAVision.com](http://BNAVision.com).



# The Waiting Game Is Over

## How Amazon's Nashville pick ended a lot of anticipation in Tennessee.

by RON STARNER  
ron.starner@siteselection.com

**G**ood things come to those who wait. In Tennessee, a decade of preparation came to an end on Nov. 13 when Amazon announced it had selected Nashville for a \$230-million, 5,000-job Operations Center of Excellence.

“This was 10 years in the making,” says Bob Rolfe, commissioner of the Tennessee Department of Economic and Community Development. “This did not happen overnight. Nashville has been working up to this for years.”

The much-ballyhooed site selection process itself took 14 months, but Tennessee sealed the deal when it offered Seattle-based Amazon up to \$102 million in performance-based incentives. The package is conditional upon Amazon creating 5,000 jobs with an average annual wage of over \$150,000. This includes a cash grant from the state of \$65 million based on the company creating those 5,000 jobs over the next seven years — or \$13,000 per job. It also includes a cash grant from the city of Nashville of up to \$15 million based on \$500 for each job created over the next seven years; and a job tax credit to offset franchise and excise taxes from the state of \$21.7 million, based on \$4,500 per new job over the next seven years.

Amazon plans to build its operations center in Nashville Yards, a 15-

Nashville photo courtesy of Tennessee Department of Economic & Community Development



# WHERE TENNESSEE BEGINS



## ITS BUSINESS DAY

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Folks in Northeast Tennessee are the first to see the sun come up each morning, but that's not where our advantages end. Our region has a rich history of innovative, pro-business initiatives that have inspired many communities across the Volunteer State to follow our lead.

- First to have multiple (4) "Select Tennessee Certified Sites" as well as other shovel-ready sites
- First to be designated a "Connected Certified Community" through Connected Nation & Connected Tennessee
- First city to become a One Gigabit Community through Bristol Tennessee Essential Services
- First to provide 2 years of free college tuition through our "Educate and Grow" program; now the highly touted, statewide program, Tennessee Promise
- First to develop a "Regional Center for Advanced Manufacturing" (RCAM), offering 3D printing, robotics, apprenticeship opportunities, and many other customized training programs

Consider our other assets – Interstates 81 and 26, Foreign Trade Zone #204, commercial airport with adjacent industrial property and on-site US Customs Port, state-of-the-art educational and training facilities, publicly owned spec buildings and business parks – and Sullivan and Hawkins counties are the first place expanding companies should consider. **Let us be the first to work for you.**



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acre (6-hectare) mixed-use development in downtown Nashville. The 1-million-sq.-ft. (92,900-q.-m.) office complex will house the tech and management functions of Amazon's Retail Operations division, including customer fulfillment, customer service, transportation and supply chain.

"This is a game changer for Tennessee," said Gov. Bill Haslam. "The ripple effect of Amazon's decision to invest \$230 million in our state and create 5,000 high-paying jobs in downtown Nashville will be felt for years to come. Amazon has spent the past year searching the nation for the best possible locations to expand and it chose Tennessee because of our business-friendly policies, low taxes and skilled workforce."

In an exclusive interview with Site Selection, Commissioner Rolfe said Tennessee thought it was competing for Amazon's HQ2 project when the company informed the state in September that it had changed strategy and was considering Nashville for a new logistics center of excellence.

"We were ecstatic when we learned this news," says Rolfe. "The original RFP of 50,000 jobs would have required Nashville to just about build a second city, but this new project was a perfect fit for us. We were very excited."

### 'The Kind of Jobs We All Dream About'

Rolfe calls Amazon "the most outstanding economic development accomplishment in the tenure of Gov. Haslam. This is the largest jobs announcement in state history. The payroll alone will be \$750 million a year, based on 5,000 jobs paying [an average of] \$150,000 a year."

Rolfe adds that "these are the



## No Mention of HOT CHICKEN

by MARK AREND



**W**as it the fiscal fitness of Tennessee and its capital that landed Amazon's Project Gardendale — the code name for its 5,000-job Operations Center of Excellence and Eastern U.S. hub for Amazon's Retail Operations division — in Nashville? Positive expansions and relocations to Nashville on the part of several major corporations (Lyft, UBS, Bridgestone and Philips Healthcare among others)? The region's entrepreneurial and optimistic culture? State incentives worth about \$102 million? All of the above?

Whatever the combination of state and local factors, Nashville got the nod. Along with the City of Nashville, the State of Tennessee also worked with key partners, including the Tennessee Valley Authority and Nashville Area Chamber of Commerce, to recruit the project to the state.

Among the final exchanges between the Tennessee team and Amazon's was a November 2 letter from Nashville Mayor David Briley to Amazon's Holly Sullivan, a key player in the site selection process. Among other points, it summarizes the metro's incentive proposal and outlines how the Job Grant component would work if agreed to by the Metropolitan Council and the Industrial Development Board. The letter also reminds Sullivan's team of some key area attributes meant to boost confidence in siting the Operations Center in Music City U.S.A.; hot chicken, a Nashville staple, was not among them.

### Safety in Numbers

"As we hope you have seen," wrote Briley, "Nashville is a low-tax city that has a low cost and high quality of living. The cost of living is below the national average, the state of Tennessee does not have an income tax, and Nashville has the lowest property tax rate in the history of Metro Government. Tennessee has the lowest debt per capita of any state in the country, and the pension funds of the city and the state are fully funded. The strength of our economy and the prudent financial stewardship of the government here should give you confidence that Nashville is a sound place for you to invest."

That's not a small point. Site Selection regularly emphasizes the importance of fiscal soundness and predictability to capital investors. Not all areas can compete effectively in that arena.

"It goes without saying that this investment will have a significant impact on the community in which it locates," added the mayor. "Buildings, roads, parks and greenways will be built. Jobs will be created. But most importantly, the lives of human beings will be transformed. We believe that Nashville is well positioned to work with Amazon to make that transformation a universally positive one. Nashville is built on a solid foundation with a hospitable, entrepreneurial and optimistic culture. We want to grow with you into the future."



# Where Tradition Meets Innovation

Pellissippi Place is a mixed-use community in East Tennessee with a business focus on technology, research and development, and commercialization. It is a collaborative effort of four local governments that are seeking to further R&D innovations in the Oak Ridge Technology Corridor/Innovation Valley.

Located in Blount County, Tennessee, near the cities of Maryville and Alcoa, Pellissippi Place will foster innovation and product commercialization, and so much more. It's unique in that all three components—business, commercial, and residential—are being planned from the beginning.

Be part of a vibrant community built on a compact, walkable scale with places for working, living, shopping and recreation. With magnificent mountains, broad rivers, a feeling of spaciousness, it's a location and that lends itself to outdoor recreation nearly year-round.



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*innovation on the oak ridge corridor*

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# ANY VOLUNTEERS?

Considering a Tennessee location? Wondering if the labor and skills supplies in the Volunteer State have the capacity to deliver now and in the future? Answers to those and other questions are supplied here by **Jennifer Hagan-Dier, director of the Tennessee Manufacturing Extension Partnership Program**, a key resource for current and future capital investors. Following are excerpts of a late 2018 exchange with **Site Selection Editor Mark Arend**.

**Site Selection: What is the overall mood in the manufacturing community in Tennessee?**

**Jennifer Hagan-Dier:**

Optimistic, vibrant and excited about growth opportunities tempered by uncertainty around global economic partnerships, trade policies and workforce shortages. Specifically, manufacturers are expressing uncertainty around the application and impacts of tariffs for raw materials coming in and finished products going out. Manufacturers in industries such as automotive, electrical appliances and food production are starting to see impacts of tariffs in their businesses and are examining supply chains and workforce needs more critically. The overall feeling across the state is one of optimism, but cost challenges around raw material imports, supply chain pressures, low unemployment and the potential negative impact on their business from tariffs are a concern for all Tennessee manufacturers regardless of industry sector.

**SS: “Finding skilled workers” is frequently cited as a primary challenge of manufacturers throughout the U.S. Is that the case in Tennessee, or should that phrase be adjusted to better reflect reality on the ground?**

**JHD:** It seems that almost every

conversation we have with our manufacturing clients eventually leads to a conversation about workforce and workforce challenges. Tennessee manufacturers cite “finding skilled workers” as a primary challenge, but the reality is that it is not as simple as just “finding skilled workers.” With historically low unemployment rates and a competitive and business friendly environment, many Tennessee manufacturers point to challenges in finding, recruiting and retaining workers — qualified or not. The reality in Tennessee is that small and medium-sized manufacturers recognize they have challenges in terms of recruitment and retention of a skilled workforce, but they rarely have a handle on the improvements they can make in their facility and business to attract and keep talent. Culture matters. The work environment matters. Employee engagement and support matters. Process optimization and new technologies also matter.

This is where the University of Tennessee Center for Industrial Services (UT CIS) and the Tennessee Manufacturing Extension Partnership (TMEP) program housed within UT CIS can help. TMEP works with small and medium sized manufacturers every day and has found that these manufacturers are often so focused on the “workforce challenge” that they fail to recognize opportunities to improve operations and adopt new technologies that can boost productivity and help manufacturers grow their business with the workforce they have. In addition, TMEP helps small and medium sized manufacturers identify the root cause of challenges including workforce challenges and works with them to develop a plan to prioritize and address the challenges. UT CIS has a statewide outreach network including a skilled and professional staff who live and work in each of the nine economic development



Jennifer Hagan-Dier,  
Director of the Tennessee  
Manufacturing Extension  
Partnership Program



regions and access to partners and resources with unrivaled business and technical expertise in manufacturing and economic development.

**SS: Not counting your MEP Center and UT CIS, what are the most beneficial agencies or resources available to manufacturers for assistance in overcoming these challenges?**

**JHD: The Tennessee Department of Economic and Community Development (TN ECD)**

TN ECD is the lead for all economic development activities for the State of Tennessee. TN ECD works with manufacturers through the “FastTrack” program, which includes grants for infrastructure development, job training and a discretionary fund for a variety of other expenses.

**The Tennessee Board of Regents (TBR) Office of Economic and Community Development**

The TBR’s Office of Economic and Community Development mission is to develop and maintain a statewide approach for workforce development that directly impacts the state and its communities.

**TNTrained**

The TNTrained program is a new initiative of Tennessee’s community and technical college system, in partnership with several state agencies, to access the education and training resources of all 40 of the College System’s campuses and meet the needs of business and industries. The TNTrained program designed a four-step process to ensure our workforce professionals are ready to assist



## Spring Hill, fastest growing community in Tennessee

-Tennessee State Data Center



“Spring Hill remains a hot regional destination for new residents due to its high-ranked schools, quality of life and affordable housing. It’s where business is ripe to thrive .”

-Kayce Williams,  
Economic Development Coordinator  
City of Spring Hill



**springhilltn.org**

kwilliams@springhilltn.org | 615-489-0108

kind of jobs we all dream about in Tennessee. But I want everyone to know that this was a city-driven initiative. The state was involved in economic development incentives, but they would have applied to any winning city in Tennessee.”

including customer fulfillment infrastructure and compensation to its 6,500 employees in Tennessee.

The new deal began to come together in September when Amazon executives, under

**“This was 10 years in the making. This did not happen overnight. Nashville has been working up to this for years.”**

— Bob Rolfe, Commissioner, Tennessee Department of Economic and Community Development

Originally, four cities in Tennessee submitted bids to land Amazon HQ2: Nashville, Memphis, Chattanooga and Knoxville. “We knew that none of our cities met all of Amazon’s parameters for HQ2, but we were very pleased when Nashville made Amazon’s top 20 short list.”

Amazon also had a history of investing heavily in Tennessee. From 2011 to 2017, Amazon invested more than \$5 billion in the state,

the leadership of project head Holly Sullivan, returned to Nashville for a day and a half of meetings and negotiations, says Rolfe. “They said, ‘We are changing our strategy for Nashville,’ ” says Rolfe. “Then we didn’t hear anything until the Monday afternoon of Veterans Day. I called the Governor at 1:30 p.m. Central Time that day with the news. Amazon originally was going to make this announcement just with a press

# HIGHLANDS ECONOMIC PARTNERSHIP



Eighth-fastest growing micropolitan region in the nation.

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Over 4,200 jobs created in five years.



release, but with Holly being from Nashville, we wanted to have our own media event here. We managed to pull everything together on less than 24 hours' notice."

Rolfe credits the city of Nashville, Davidson County, the Tennessee Valley Authority, the Nashville Area Chamber of Commerce, the Governor's Office, and other state and local entities with working around the clock to close the mammoth deal.

"Former Mayor Megan Barry and current Mayor David Briley really stepped up," says Rolfe. "It was a total team effort."

### Nashville Faced 'Enormous Competition'

The project site chosen is an ideal fit, he adds. "It is right along Interstate 40, just two blocks from the highway," he notes. "It has enormous visibility. Lots of housing options are there already, and more are coming. A new Grand Hyatt Hotel is under construction there now, and more retail, office, residential and entertainment

are coming."

Rolfe says that "there was enormous competition for this Center of Excellence," although he would not divulge the other finalist locations. "It was very stiff competition for this red-ribbon project. This will be one of 17 Amazon divisions that will report directly to Jeff Bezos, and we know that 20 percent of the jobs will be IT-related tech positions such as programmers and software developers."

Nashville's talent and academic footprint helped close the deal, says Rolfe. "We provided Amazon with a labor shed report of all the talent they needed within a 90-to-100-mile radius," he says. "Nashville has so much going for it."

Amazon will house workers in temporary space while the new facilities are being constructed, Rolfe adds. "They are in the final design stages now for their new building. It will take them about 20 months to complete construction, but we know this about Amazon: They grow ahead of schedule." ▼



Leading the way for high tech location in the Southeast, Clarksville-Montgomery County, Tennessee is the best place for your business. Recently named one of the top three emerging tech hot-spots by the Wall Street Journal, this gig city offers everything from strategic location and aggressive local incentives to a low cost of living and an educated workforce.

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How TVA helped recruit a Belgian bus maker to a town in Tennessee.

by GARY DAUGHTERS

[gary.daughters@siteselection.com](mailto:gary.daughters@siteselection.com)

When word filtered out in 2015 that one of the world's top bus makers hoped to build a plant in the southeastern U.S., economic developers from throughout the region began beating a path to Koningshooikt, Belgium. They came from Kentucky, the Carolinas, Virginia, Georgia, Florida and Tennessee, all intent on luring Van Hool, a fourth-generation family enterprise, which has delivered more than 10,000 buses to the U.S. market since 1987. The prize for the winner: a \$47-million investment and the promise of at least at least 600 coveted manufacturing jobs.

Chris Berryman, target market specialist for transportation-related industries for Tennessee Valley Authority (TVA) Economic Development, witnessed the site selection process from the inside. It took three years.

"It was all about building relationships," Berryman tells Site Selection. "We knew that,

this being a family company, they were going to need all the advice we could give to get them comfortable with making an investment in the southeast U.S. We probably spent more on relationship building and doing site selection processes than most other companies would do."

The hard work paid off. Van Hool narrowed its list of 16 potential locations to three, all within the TVA's seven-state footprint, before choosing a 116-acre (47-hectare) site at an industrial park in Morristown, Tennessee.

"We're very excited to invest in Morristown," said company president Filip Van Hool at a ceremony in April. "We looked at lots of different places, but we opted for Morristown to make the largest investment outside Belgium in Van Hool's 71-year history."

#### **Wanted: Multi-Skill Talent**

Tucked away in Tennessee's northeast corner, Morristown is a place that's known for making

A three-year site search culminated in Van Hool's selection of Morristown in April 2018.

Photo courtesy of Morristown Chamber of Commerce



# “Any project I do, whether 25 jobs or 1,000 jobs, TVA is deeply involved.”

— Marshall Ramsey, President, Morristown Chamber of Commerce

things. The city of 30,000 people supports 107 manufacturing companies, and once called itself the “chair capital of the world.” It has a robust roster of automotive suppliers, including Mahle, Kawasaki, Lear, JTEKT and Meritor Gear Systems. TVA’s Berryman said Morristown’s “labor story” was instrumental in landing Van Hool, even though the city has never produced a vehicle from the ground up.

“Transferable skills,” says Berryman, “drove this project home. This is a case study of where a company can truly take transferable skill sets from other target industries like construction, contracting, furniture making and cabinetry. There’s quite a bit of cabinetry that goes into a bus. They can utilize those skill sets to turn people into auto workers. That’s the unique part of bus manufacturing. It has a lot of flexibility in terms of filling its workforce needs.”

If auto-making leans toward the rote assembly of pre-made components, bus manufacturing requires more craft and versatility, says Marshall Ramsey, president of the Morristown Chamber of Commerce.

“Van Hool liked the fact that the workers don’t just stand on the assembly line and push buttons,” Ramsey tells Site Selection. “A lot of our workers are multi-skilled and multi-faceted and adaptable. It’s sort of like the furniture industry. Van Hool seemed to appreciate that we have a lot of people with a lot of different skills.”

“Advanced manufacturing is great, but not everybody can make things that way,” he says. “Van Hool needed true craftsmanship, not just a robot making a part. They appreciate people putting their hands on something and being responsible for that end-product.”

With 600 jobs to start and the prospect of 600 more in the next five years, Van Hool, says Ramsey, will quickly become one of the top employers in a town that has lost thousands of furniture-making jobs to lower-cost markets in Asia.

“This,” Ramsey says, “will allow people with

furniture skills to continue in that trade. When you get in your 40s and 50s and the company moves to China, it’s hard to re-train yourself.

Allowing some of those people to be able to continue in that line of work for a good company that’s going to be here for a long time is really important for us.”

Says TVA’s Berryman: “A bus manufacturing company is a great resume builder for someone in a craftsman type industry that would like to seek a traditional automotive supplier job in their community. When working at Van Hool, that employee will be able to put on their resume ‘automotive,’ giving them an edge to compete for higher skilled automotive supplier work in their community.”



Chris Berryman, TVA

## It’s More Than Just Electricity

Utilities such as TVA are valuable assets in economic development. Often, they have more marketing and project management resources than economic agencies themselves. While selling power remains the primary objective, job creation and capital investment are increasingly important metrics in measuring success.

“They’re one of my strongest partners,” says Ramsey. “Any project I do, whether 25 jobs or 1,000 jobs, TVA is deeply involved. I don’t make a phone call to a prospect without talking to TVA first. A lot of people think of them as just a wholesale power provider, but that’s the last thing I think of when I think of TVA.”

“When we buy land,” says Ramsey, “I let TVA come in and look at contour maps and help do our conceptual park layouts. And then when we have prospects for each site, they will come in and do the building layout, assess how to expand and how to make the roadways work. They do work that I would typically have to pay engineers \$50,000 to \$100,000 to do. TVA comes in and does that at no cost to me. A lot of communities don’t even realize this. I use TVA for everything.”

“TVA,” Ramsey says, “has a strong desire to improve everyone’s community.” ▼

This Investment Profile was written under the auspices of TVA Economic Development. For more information, please visit TVA’s sites and buildings database [TVAsites.com](http://TVAsites.com).



Caption: Ann Arbor startup Duo Security scored a \$2.3-billion payday in October. Photo courtesy of Duo Security

# WHO ARE THESE GUYS?

Ann Arbor's growing tech community is making a name for itself.

by GARY DAUGHTERS  
gary.daughters@siteselection.com

While Detroit was left reeling by November's news of GM plant closures and the potential loss of more than 1,500 local auto-working jobs, its tech-centric neighbor to the west, Ann Arbor, observed a significant milestone. Duo Security, launched from an Ann Arbor incubator in 2010, was acquired by Cisco for a whopping \$2.35 billion, the largest acquisition of a venture-backed startup in Michigan's history.

Founded by Dug Song and Jon Oberheide, two graduates of the University of Michigan, Duo is a cornerstone of Ann Arbor's tech community. In an email exchange with Site Selection, Oberheide noted the company's humble beginnings, which were not that long ago.

"When Dug and I started Duo in 2010 at Tech Brewery, a co-working space for entrepreneurs and startups in Ann Arbor, we worked from two desks in the corner of the office. Our first salesperson was a stuffed tiger — our patron saint, so to speak. Fast forward eight years, and we help protect 14,000 customers, including many of the world's largest and fastest-growing organizations."

Duo is a leader in multi-factor authentication (MFA), which combats security breaches by adding tell-tale layers to the login process.

*(continued on Page 184)*





# WHERE BIG IDEAS BECOME BIG BUSINESS

Long the home of industry giants like Amway, Herman Miller, Steelcase, and more — West Michigan is where it all comes together for growing companies.

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# A TRIPLE PLAY OF AUTOMOTIVE INGENUITY

By RON STARNER

**T**he automotive industry recorded a unique triple play in Michigan last month.

The first wave of investment news came Dec. 5 when PlanetM awarded grants totaling more than \$224,000 to HAAS Alert, Humanising Autonomy and RoadBotics to launch pilots that address transportation challenges in Michigan as part of the PlanetM Startup Grant program.

PlanetM is a partnership of mobility organizations, communities, educational institutions, R&D and government agencies that work together to develop and deploy in Michigan the mobility technologies driving the future.

HAAS Alert is a Chicago-based startup that has partnered with Grand Rapids Police, Fire and Life EMS to deploy the nation's first complete citywide alert system. Humanising Autonomy is a London-based startup that builds human-centered tools to improve safety and efficiency of autonomous systems through understanding human behavior. It will test bus driver alerts to help predict pedestrian, cyclist and other driver actions in collaboration with the Ann Arbor Transportation Authority. RoadBotics is a

Pittsburgh-based startup that uses artificial intelligence to generate automated pavement condition data.

The second investment project came Dec. 6 when Drive

and driveline systems, DSD is expected to create 25 high-wage engineering jobs. Michigan was chosen for the expansion over a competing site in California. The Michigan Economic Development Corp. (MEDC) awarded DSD a \$175,000 performance-based grant in support of the project.

The third investment project was delivered Dec. 13 when Tooling Technology LLC announced that it would relocate its headquarters from Ohio to Macomb Township as part of a \$19.9-million investment that will create 100 new jobs in Michigan over five years. MEDC agreed to give the company a \$750,000 performance-based grant.

The automotive supplier said it would move from Fort Loramie to Michigan, where 257 of the company's 650 employees work in four different locations. Founded in 1982, Tooling Technology is an automotive interior die-cast and stamping tooling business that operates 12 U.S. plants.

"We have aggressive growth plans, and being in Macomb in Southeast Michigan puts us in a good position to accomplish them," said Tony Seger, chairman of Tooling Tech Group.

**“We have aggressive growth plans, and being in Macomb in Southeast Michigan puts us in a good position to accomplish them.”**

—Tony Seger, Chairman,  
Tooling Tech Group

System Design Inc. announced that it would invest \$1.7 million to expand in Farmington Hills. A global engineering consultancy specializing in the design, development and control of future transmission



# COMMITTED

DTE Energy wants Michigan business to thrive. That's one reason we plan to spend \$5 billion with Michigan-based businesses through 2020. We also want to help build Michigan's future, so we have economic specialists to help those interested in starting, relocating or expanding a business here. They'll consult with you on the most cost-effective ways to manage your energy, and be more profitable.

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**DTE Energy**



(continued from Page 180)

“MFA,” Oberheide says, “protects against phishing and other attacks and secures logins from attackers exploiting weak or stolen passwords.”

In a blog post, Cisco’s executive vice president and GM David Goeckler explained to employees that the Duo acquisition would pair Cisco’s networking power with a security component.

“Duo’s relevance spans across the entire extended enterprise,” Goeckler said. “It’s a highly strategic addition that enables Cisco to deliver what our customers require in today’s multi-cloud world — the ability to securely connect any user to any application on any network.”

Feted as Ann Arbor’s first unicorn, Duo is part of an entrepreneurial ecosystem that has yielded “a huge proliferation of technology-related jobs,” says Phil Santer, vice president and chief of staff of Ann Arbor SPARK, a ubiquitous public-

Development Corporation and Ann Arbor SPARK, believes the city is poised for a breakout.

“There have been a lot of really great ingredients in Ann Arbor for a long period of time, and we’re just now starting to see those ingredients come together to make something great. Duo is a great example,” she says, adding that Duo’s pricey acquisition by Cisco means that “a lot of people with experience with Duo will have some extra liquidity and will be looking to make investments of their own. We’ll see people leave Duo and start more companies in Ann Arbor.”

### Silicon Valley Comes Calling

As if by providence, a team of site selectors from Silicon Valley touched down in Ann Arbor on the very day the city was celebrating the news of Duo’s \$2.35 billion payday. It wasn’t the team’s first visit. KLA-Tencor, a semi-conductor equipment



**There have been a lot of really great ingredients in Ann Arbor for a long period of time, and we’re just now starting to see those ingredients come together.”**

— Emily Heintz, *Founder, EntryPoint*



private partnership that promotes economic development, particularly in the realm of startups and entrepreneurship.

“Just in downtown Ann Arbor,” Santer tells Site Selection, “we’ve got 181 tech companies with 2,800 employees. I think it’s only going to grow. It’s a huge part of our economy.”

Like Santer, Emily Heintz comes armed with numbers. Heintz recently founded EntryPoint, an economic development research group. She tallies 53 “active venture-backed startups” in Ann Arbor, representing 40 percent of the startups in Michigan and a 20 percent increase in the last four years. She counts 16 venture capital firms headquartered or with an office in the Ann Arbor area, which represents, she says, over 50 percent of the venture capital firms operating in Michigan.

Heintz, who held previous jobs at the Michigan Venture Capital Association, Michigan Economic

company, had begun its site search for a \$70 million R&D facility with 350 potential locations. Desktop analytics helped the company pare its list to 12, then three.

The lengthy site search was led by Bobby Bell, KLA-Tencor’s chief strategy officer.

“The criteria we used,” Bell tells Site Selection, “were talent supply, talent quality and cost. We also looked at the university network in each region. We looked at the quality of life attributes and the ability to attract talent to the area. We thought partnership with leading universities on research was very important.”

The University of Michigan, which would play a crucial role in KLA-Tencor’s ultimate decision, has evolved into a catalyst for entrepreneurial activity with a federally-funded research budget of \$1.5 billion a year, second only to Johns Hopkins, according to the National Science Foundation. In



# PURE BUSINESS



Whether you're looking for a place to start, grow or expand your business, there's one state that's synonymous with business success. Michigan. Consistently ranked among the top 10 states for major new and expanding facilities, Michigan offers a top-ranked business climate, six percent corporate tax and a wide range of resources. For global manufacturers, tech startups, innovators, entrepreneurs and more, Michigan is committed to business success.

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a press release issued in October, U-M reported that the number of startups launched at the university nearly doubled in 2018 to 21.

“U-M inventors,” the school reported, “went to market with a broad array of discoveries from autonomous shuttles to a post-surgery warning system that alerts doctors to patient distress well ahead of traditional methods.”

Kelly Sexton, associate vice president for research-technology transfer and innovation partnerships at U-M, said the school’s Office of Technology Transfer is seeing increased interest from companies wanting to connect with U-M to license technology.

“We’re seeing an explosion of interest in launching software startups,” Sexton said, noting that nine of the 21 startups are software companies. “Network security, for instance, is now one of the fastest growing industry sectors in the Ann Arbor area, and it all started with the university’s investment in the early internet.”

The recent crop of U-M startups includes

Censys, a security platform invented in a computer science lab that helps information security professionals monitor and analyze devices accessible from the internet; Fifth Eye, a system that monitors the autonomic nervous system of hospital patients and predicts problems; and May Mobility, which has licensed five autonomous driving-related technologies from U-M that will help build out a fleet of autonomous public transit vehicles.

In late October, KLA-Tencor announced its decision to build its new R&D center in Ann Arbor, which beat out undisclosed sites in Canada and the southwestern U.S. The investment is to create about 500 new tech jobs.

“The whole Ann Arbor/Detroit metro area is going through a transformation,” says Bell. “We didn’t want to be the biggest fish in a little pond. We wanted the area to be attractive and prosperous to help us get the talent we’re looking for. Ann Arbor,” he says, “is really up and coming.” ▼

Your Company Has Talent Needs,

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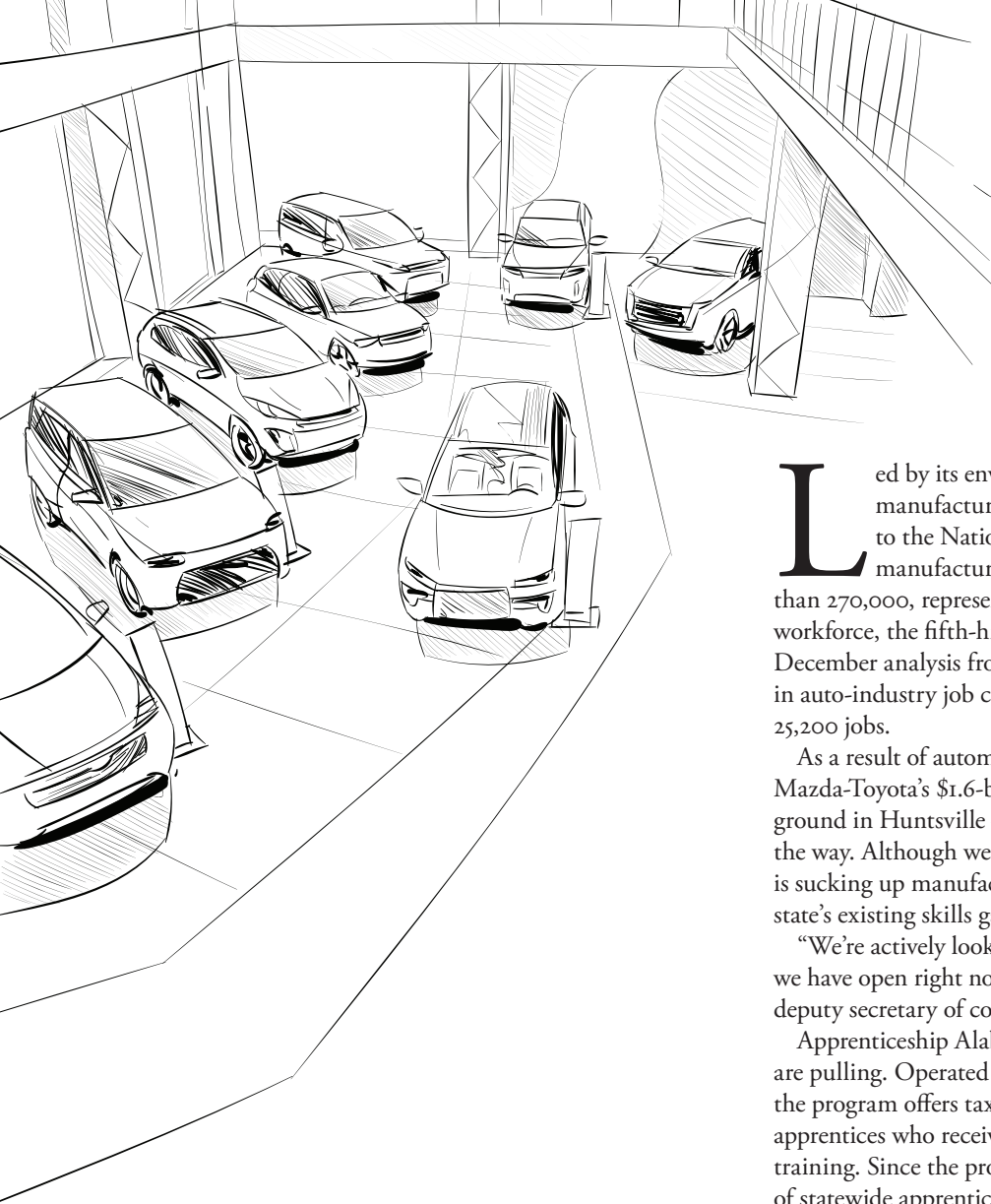
Access to talent is the number one issue facing growing businesses across the country. Shiawassee County, Michigan is committed to providing solutions to our employers so they have the skilled and available workforce they need, including:

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To learn how your company can take advantage of these efforts, call Justin Horvath at 989.725.9241 or visit us on the web at [sedpweb.org](http://sedpweb.org)





# The Test of Success

**Alabama's roaring auto industry intensifies workforce strain, but apprenticeship is gaining ground.**

by GARY DAUGHTERS  
gary.daughters@siteselection.com

**L**ed by its enviable auto industry, Alabama's manufacturing sector is on a serious roll. According to the National Association of Manufacturers, manufacturing workers in Alabama now total more than 270,000, representing more than 13 percent of the state's workforce, the fifth-highest concentration in the country. December analysis from Axios identified the state as No. 1 in auto-industry job creation since early 2000, welcoming 25,200 jobs.

As a result of automotive deals announced in 2018 — led by Mazda-Toyota's \$1.6-billion, 4,000-job complex about to break ground in Huntsville — many more manufacturing jobs are on the way. Although welcome, the proliferation of automotive jobs is sucking up manufacturing workers while exacerbating the state's existing skills gap.

"We're actively looking for over 29,000 people for the positions we have open right now," says Ed Castile, the state's longtime deputy secretary of commerce for workforce development.

Apprenticeship Alabama is one of several new levers officials are pulling. Operated under the U.S. Department of Labor, the program offers tax credits to companies that hire qualified apprentices who receive classroom instruction and on-the-job training. Since the program's launch in January 2017, the number of statewide apprentices has climbed from 3,300 to 5,000. Castile says that total could double when 2018 numbers are tallied.

Newman Technology, which supplies trim and window sash components to Honda and Toyota, employs nine full-time apprentices in machinery and multi-craft maintenance at its plant in Albertville. Newman covers tuition at Northeast Alabama Community College in nearby Rainsville. For the apprentices, the four-year program leads to a two-year associate's degree.

"Our approach," says plant manager Jeff Thomas, "is to place three, four or five people into the program each year. By their fourth year, they'll be card-carrying members of the company, and the others will flow in a progression right behind them."

The college, together with Apprenticeship Alabama, handles associated paper work, which Newman says is a huge weight off of the company's shoulders. Employers' fears of federal red tape, says Castile, have blunted the program's potential.

"Some companies just don't want to have anything to do with the federal government," he says. Largely because of that, Alabama is planning, by mid-2020, to establish a state office of apprenticeships with a looser connection to Washington.

"We think that's going to quadruple the number of apprenticeships and programs we have," says Castile. "We are moving in the right direction." ▼



## Museums and historic sites across the heartland have historic ties to industry, but their neighborhoods aren't living in the past.

by ADAM BRUNS

adam.bruns@siteselection.com

**W**hen Brad Novak started collecting bobblehead dolls in 2002, he probably didn't imagine that one day he'd be co-founder and president of the National Bobblehead Hall of Fame and Museum in Milwaukee, Wisconsin.

Today the collection has grown to more than 5,000 bobbleheads. The permanent museum will open in early 2019 near the historic Walker's Point neighborhood, at the former Kramer International foundry. The city's industrial heritage includes a number of manufacturing companies that operated their own foundries.

How many other Midwestern museums have ties to their locations' unique industrial heritage? Here's a brief checklist:

**Illinois:** The Museum of Science & Industry in Chicago is housed in the former Palace of Fine Arts from the 1893 World's Columbian

Exposition. But you'll find plenty of industrial and labor movement history a few miles away at the Pullman Historic District, built in 1880-84 as a planned model industrial town for the Pullman's Palace Car Company. Today the area is seeing a development renaissance.

**Indiana:** If you've ever seen the film "Breaking Away," you know the locals known as "cutters" got their name from Indiana's limestone business. You can find out all about it at the Land of Limestone Museum, housed within Stonegate Arts & Education Center in Bedford, the "Limestone Capital of the World." Among other functions, StoneGate provides classrooms and office space to Ivy Tech Community College and Oakland City University.

**Iowa:** The John Deere Tractor & Engine Museum is located on the west side of the TechWorks Campus, an advanced

The National Museum of the U.S. Air Force at Wright-Patterson Air Force Base near Dayton, Ohio

Museum photo by Ken LaRock; photos courtesy of U.S. Air Force



manufacturing, innovation, and commercial center in downtown Waterloo, Iowa, where the company's tractor era began with the acquisition of the Waterloo Gasoline Engine Company and the Waterloo Boy tractor in 1918.

**Kansas:** "In 1962, Cosmosphere founder Patty Carey set up a used Planetarium Projector and rented folded chairs in the Poultry Building of the Kansas State Fair Grounds and created one of the first public planetariums in the central United States," explains the website of this STEM education center and space museum found on the campus of Hutchinson Community College. Among area employers is an Arconic (formerly Alcoa) plant that makes aluminum for the aerospace sector.

**Michigan:** In 1904, Detroit newspaper publisher and philanthropist George Gough Booth and his wife Ellen Scripps Booth bought 175 acres in Bloomfield Hills that would become the Cranbrook Educational Community. Known for its contemporary art museum, Cranbrook also is home to an Institute of Science, as well as pre-K through Grade 12 independent college prep schools.

**Minnesota:** The Museum of Questionable Medical Devices (the state's medical device cluster is top

notch) now is part of the Science Museum of Minnesota. The Mill City Museum is on the site of what was once the largest flour mill in the world. But you don't want to miss The SPAM Museum in Hormel's hometown of Austin. Today Hormel employs 20,000 around the world.

**Missouri:** Located in the former International Shoe Company building in St. Louis, the City Museum, opened in 1997, was the brainchild of artist and entrepreneur Bob Cassilly, whose website describes it as "an eclectic mixture of children's playground, funhouse, surrealistic pavilion, and architectural marvel made out of unique, found objects," all reclaimed from within the city's municipal boundaries.

**Nebraska:** Closed after the formation of Amtrak in 1971, Omaha's Union Station was gifted to the city by Union Pacific in 1973. Today it's home to the Durham Museum, named after benefactors Charles and Margre Durham. He was a civil engineer who built Henningson Durham & Richardson (HDR) into one of the nation's largest architectural and engineering companies.

**North Dakota:** In addition to its many aircraft, the Fargo Air Museum, opened in 2001, also houses one of the

Midwest's largest aviation libraries. Among the aircraft on display is the Global Hawk, an unmanned reconnaissance drone and a key component of the state's unmanned aircraft systems (UAS) cluster forming around the assets of Northern Plains UAS Test Site in Grand Forks.

**Ohio:** The National U.S. Air Force Museum at Wright-Patterson Air Force Base near Dayton (home of the Wright Brothers) is the world's largest and oldest military aviation museum. Dating to 1923, when it opened in an aircraft hangar at the edge of McCook Field near downtown Dayton, the museum collection has grown to more than 360 aerospace vehicles and missiles. The Wright Company factory, founded in 1909, was the first factory established for the purpose of building airplanes.

**South Dakota:** The Mammoth Site in the Black Hills community of Hot Springs, South Dakota, is an active archaeological dig site that boasts the largest concentration of mammoth fossils in the world. The original discovery occurred in June 1974 when heavy equipment operator George Hanson struck a 7-foot-long tusk with his blade — a supreme example of why archaeological reports are a part of every site selection's due diligence. ▼

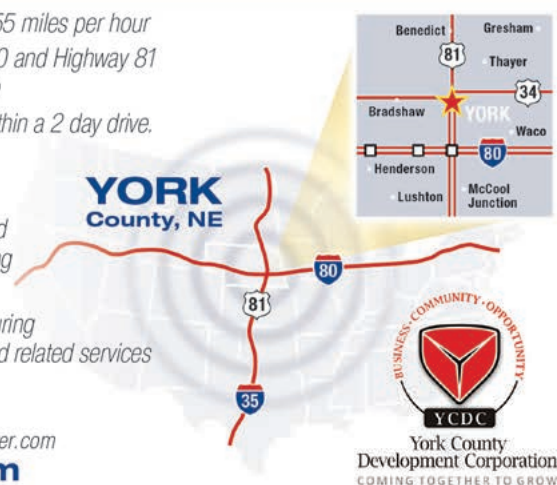
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# R&D, Ecosystems and VC Prove Central to Innovation

**M**any executives we interviewed say that as they increasingly look to increase their pace of change and transformation, they are not only leveraging internal assets in new and different ways but also turning more often to resources outside of their walls, as there are clear advantages to being close to where innovation is occurring. Many have formed partnerships and/or collaborate with other companies as well as universities, venture capitalists (VCs), research organizations, and/or industry consortiums ...

They also feel, for the most part, that the US innovation ecosystem has a leadership position, but others are quickly catching up. Secondary research showed that, within the global competitive manufacturing landscape, both businesses and government research and development (R&D) play a major role in innovation ecosystems and are committing significant resources to R&D in advanced manufacturing ...

Businesses account for the lion's share of R&D spending, an accelerating trend across leading nations. Of the top 100 companies by R&D spend, the overwhelming majority (86)

belong to the manufacturing sector, and 42 are from the United States. Also, 62 of the top 100 manufacturing companies by revenue belong to the top four future competitive manufacturing nations ...

Like businesses and government R&D, VC investments play a vital role in feeding the innovation pipelines within top manufacturing nations. There was concern by some interviewed executives about the short-term, near-horizon timeline some VCs currently cite as deterrents for heavier VC activity in capital-intensive manufacturing. Some indicate more focus is needed in the mid-term horizon (e.g., five to 10 years) within manufacturing technology and innovation to help further tech transfer and to close potential "valley of death" commercialization issues.

... Overall, many feel that more could and should be done to increase VC levels within the manufacturing technology space. Therefore, executives also indicate they are increasing venture capital activities internally, a growing trend for industrial companies, with some setting up their own venture funding arms to supplement traditional in-house capabilities.

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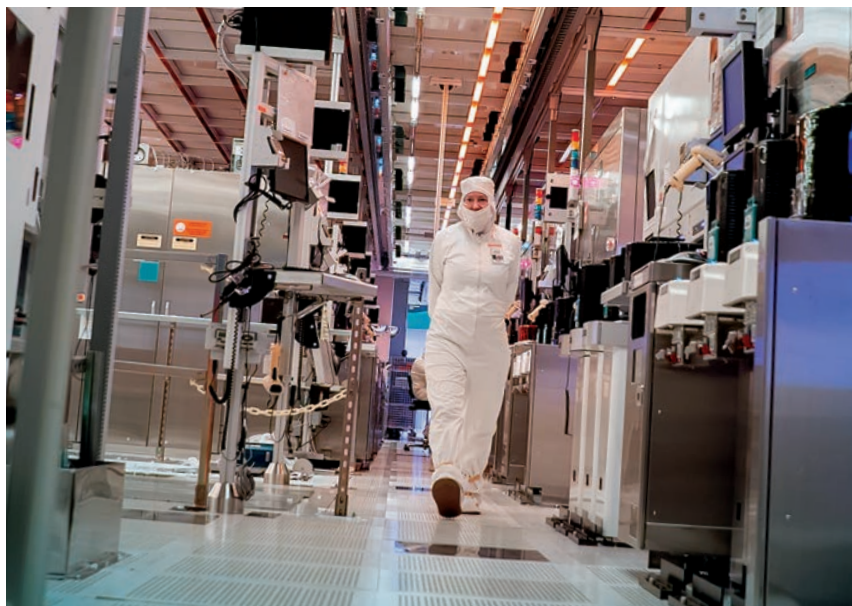
*This is an excerpt from Deloitte's "Exponential Technologies in Manufacturing" study, published in early 2018, and based on seven months of surveys and discussions with executives at some of the world's largest manufacturing organizations.*

*For the complete report, visit [www2.deloitte.com/us/en/pages/manufacturing/articles/advanced-manufacturing-technologies-report](http://www2.deloitte.com/us/en/pages/manufacturing/articles/advanced-manufacturing-technologies-report).*

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**Intel is planning site expansions in Oregon, Ireland and Israel, with construction expected to begin in 2019.**

Photo by Tim Herman courtesy of Intel Corporation





# Sometimes the address says it all.



## Irvine businesses are thriving. **Grow with us.**

Irvine was master planned to be an economic powerhouse. A strategic location, 21st century university and colleges, business-oriented governance, a high quality of life and rich diversity energizes us and helps us attract and retain the best talent and the brightest companies in the life sciences, technology, digital arts & media and advanced manufacturing.

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IN AMERICA**

(population over 100,000)

- Federal Bureau of Investigation (FBI)

# MISSISSIPPI PLAYS TO WIN

**M**ississippi continues to recruit top-tier companies with its highly skilled workforce — a workforce the state is committed to developing to fill the in-demand jobs of the future.

With workforce development being a top priority of his administration, Gov. Phil Bryant enacted the Mississippi Works Fund in 2016. The fund commits \$50 million to assist in growing the workforce of tomorrow. Seventy-five percent of the funds are allotted for new job creation while 25 percent is allotted for existing workers and workforce certification. The fund has proven to be a valuable resource as corporate leaders rely on a quality trained workforce to help them achieve success and long-term growth in today's dynamic marketplace by providing a pipeline of skilled workers for their facilities.

The state of Mississippi, through forward-thinking initiatives such as the Mississippi Works Fund, is able to help these and other manufacturers exceed production goals by enhancing its workforce and creating an environment where businesses can thrive.

The legislation also has been instrumental in the start-up of programs critical to helping fill in-demand manufacturing and high-tech jobs throughout the state.

The Mississippi Furniture Academy is the first program started as a result of the Mississippi Works Fund. Launched in 2017, the manufacturing skills program is a 28-hour course designed to train students for in-demand jobs in the furniture manufacturing sector.

Addressing a need to fill high-tech coding jobs throughout the state, Mississippi Works funds assisted in the creation of the Mississippi Coding

**With workforce development being a top priority of his administration, Gov. Phil Bryant enacted the Mississippi Works Fund in 2016. The fund commits \$50 million to assist in growing the workforce of tomorrow.**

Northrop Grumman, manufacturer of rotary and fixed-wing autonomous systems and manned platforms in support of the United States and its global allies, announced the addition of a mix of new work to its Unmanned Systems facility in Jackson County. The project is a \$3.7 million investment which created 60 jobs for workers along the Mississippi Gulf Coast — employees who received training as a result of the Mississippi Works Fund.

Tool maker Milwaukee Tool and third-party logistics provider FedEx Supply Chain are also benefiting from the Mississippi Works Fund as funds support the training of the companies' 660 and 450 new employees, respectively.

Academies. The academies offer post-secondary students an intensive 11-month, tuition-free computer science education program. The program prepares highly motivated high school graduates for careers in the high-tech field of coding.

These business advantages and proactive economic development initiatives position companies for years of growth and viability in Mississippi.

*To learn more about how a Mississippi location can help your business gain momentum, contact the Locate Mississippi team at 1.800.360.3323 or [locateinms@mississippi.org](mailto:locateinms@mississippi.org).*





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[www.mississippi.org/workforce](http://www.mississippi.org/workforce)

When it comes to developing the workforce of the future, Mississippi means business. The Mississippi Works Fund is just one initiative undertaken by the state to provide new or existing companies the resources to access a talented, ready-to-work labor pool. **Learn more about how Mississippi can work for your company.**

MISSISSIPPI  
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MISSISSIPPI



# Hottest Market in Southern California

Competitive, successful companies looking to expand their brand know there is one place in Southern California that consistently beats the rest — the City of Moreno Valley. With a population of 212,000, and 2.3 million in a 20-mile trade radius, Moreno Valley is only an hour away from Los Angeles — including the busy ports of Long Beach and Los Angeles — Orange and San Diego counties and less than three hours to Nevada, Arizona and Mexico.

Moreno Valley's strong growth has seen the creation of 17,000 jobs in the last 5 years. At 4,500 businesses strong, Moreno Valley is home to regional headquarters and major facilities for Fortune 500 and international companies including ALDI Foods, Skechers USA, Floor & Décor, Harbor Freight Tools, Lowe's Home Improvement, Solaris Paper, O'Reilly Automotive, Ross Dress For Less, Sherwin Williams and Walgreens. Karma Automotive manufactures their luxury hybrid automobile, Karma Revero, in Moreno Valley.



Luxury hybrid automobile, the Karma Revero, is manufactured in Moreno Valley, California.

Residential construction is booming — more than 7,000 single and multi-family units are under construction or in development.

Three colleges (University of California, Riverside, Cal Baptist University and Moreno Valley College) attract more than 40,000 students. In total, 44 universities and community colleges educate more than 225,655 undergraduates within 50 miles of Moreno Valley.

Riverside University Health System Medical Center (headquarters for

Riverside County's hospital system, based here in Moreno Valley) and Kaiser Permanente are both expanding their facilities to meet strong regional demand.

Moreno Valley's March Inland Port Airport is ideal for air cargo and private corporate flights, while passengers may choose from five international airports within an hour's drive.

Moreno Valley offers a host of incentive programs, including electric rate discounts through its City-owned electric utility, ranging from 7% to 26.5%. Businesses may receive an additional two to four percent for hiring locally.

The City also developed the "Hire MoVal" program, which offers business license fee waivers and access to small business development resources. Together, the City of Moreno Valley and the County of Riverside run the popular Employment Resource Center, offering businesses free workforce recruitments, employee training, business consulting, workshops and job postings.

Moreno Valley's ideal location, business friendly atmosphere and motivated workforce are why so many Fortune 500 companies have made it their home. Contact us to find out what we can offer you.

For more information about the City of Moreno Valley email [edteam@morenovalleybusiness.com](mailto:edteam@morenovalleybusiness.com) or call 951.413.3460 or visit us on the web at [www.morenovalleybusiness.com](http://www.morenovalleybusiness.com)

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- 20-mile radius population 2,375,586**
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## Komatsu Mining plans a \$285 million campus in Wisconsin, highlighting the state's appeal for advanced manufacturing

**K**omatsu Mining Corp. has announced plans for a new state-of-the-art headquarters, training and manufacturing campus along the Lake Michigan harbor in Milwaukee. The company's decision to expand in Wisconsin demonstrates the appeal of the state's advanced manufacturing environment and overall business climate. The company's growth also shows how acquisition by a global company often leads to additional local investment.

Planned to be completed in 2022, Komatsu's massive 54-acre project at the former Solvay Coke site will be known as the South Harbor Campus. It represents a major boost for efforts to redevelop Milwaukee's waterside district, and in a nod to the company's history, the new campus will be located near its original machine shop.

The initial job count for the campus will be roughly 1,000, including 400 new hires and the company's 600 current employees. The total employment figure could increase to 1,300 workers over the next decade, according to Komatsu.

The new corporate and manufacturing hub will keep the company, formerly known as Joy Global, firmly planted in the city it has called home for 134 years. Komatsu Mining is part of the global Komatsu Ltd. family of companies, which acquired Milwaukee-based Joy Global in 2017 and renamed it Komatsu Mining Corp. The company produces industry-leading equipment and service brands like P&H, Joy and Montabert for mining and related industries.

### The latest in growing roster of high-profile developments

The ambitious project is the latest in a series of investment attraction successes for Wisconsin's manufacturing sector. In recent years, the state has inked deals with Foxconn Technology Group for its Racine County complex, as well as with gummy candy maker HARIBO for its Kenosha County operation.

The Wisconsin Economic Development Corporation worked closely with Komatsu to create an incentive

package that will provide the company with up to \$59.5 million in state income tax credits over the next 12 years. Komatsu will earn those credits based upon the number of jobs created and retained; the amount of capital investment made; and the amount spent on purchasing equipment, goods and services from Wisconsin-based companies during that period.

"This is a win for the city, the state, our employees, customers and the community," says John Koetz, president of surface mining at Komatsu. "Together we are investing in Milwaukee's future as a manufacturing stronghold and valued employer. We are preserving existing jobs, laying the groundwork for new employment opportunities, investing in the workforce of tomorrow and helping attract talent to the area. Milwaukee is a great place for manufacturing. We are proud of our history here and excited to start building our future."

### Facility to house all aspects of company operations

Plans for the new campus call for about 170,000 square feet of office space, a 20,000-square-foot museum and training building, and 410,000 square feet of manufacturing space. It will consolidate two of Komatsu's current Milwaukee-area facilities into a central location, and current estimates call for the project to be completed in 2020.

The plans include advanced machine, heat treat and fabrication shops; state-of-the-art technology, research and development and robotics labs; an office complex and data solutions center; a global training and conference center; and a City of Milwaukee public riverwalk adjacent to the campus.

### Sustainable design a part of overall design

The campus will feature extensive solar panels, wind spires and other sustainable building systems to achieve "near zero emissions," according to Komatsu. Since the company renewed its labor contract with the local United Steelworkers union earlier in 2018, it has increased hiring and transferred more manufacturing operations from China to Milwaukee. Komatsu also has announced that its Milwaukee plant will produce the P&H 4800XPC, which is the largest mining shovel Komatsu has ever made and was designed by engineers in Milwaukee.

"The new campus provides us opportunity for advancement in state-of-the-art facilities that expand our capabilities on a global scale," says Jeff Dawes, president and CEO of Komatsu Mining.

*More information about Wisconsin's business development resources can be found at [InWisconsin.com](http://InWisconsin.com).*

**Komatsu Mining Corp. has announced plans for a new state-of-the-art headquarters, training and manufacturing campus in Milwaukee. The massive 54-acre project is planned to be completed in 2022.**



## Cape Coral: A Magnet for Advanced Manufacturing

**T**his fast-growing Florida city is an ideal location for advanced manufacturing with plenty of room for expansion and a low cost of doing business.

If you're planning to relocate or expand your advanced manufacturing business, Cape Coral is the ideal location. The waterfront city boasts a low cost of doing business, no state income tax and plenty of room for expansion. The Cape Coral metro area was named this year as one of the Top 10 fastest-growing in the nation—for both population and job expansion. Located on the Gulf of Mexico in Southwest Florida, the 120-square-mile city with more than 183,000 residents maintains a small-town feel set amidst 400 miles of canals.

Cape Coral's thriving advanced manufacturing environment includes the production of solar-energy components, electronics, pharmaceuticals, nutraceuticals, optical instruments and ecological technologies, among others.

### Large Workforce

Cape Coral-based S4J Manufacturing Services got its start in precision machining in 1965 and has become one of the nation's top three manufacturers of Luer lock connectors, mini quick connects and adapters for the biomedical field. The company has grown steadily

since relocating to Cape Coral in 1999, with more than 1,000 customers worldwide.

"The beautiful thing about being a manufacturer in Cape Coral is that there's a huge pool of potential employees who live in the Cape," says S4J Manufacturing CEO Doug Guyre.



Albert Aro operates precision machines to produce biomedical components at S4J Manufacturing Services.

### Room to Expand

Ecological Laboratories is on the forefront of sustainability, creating toxin-free solutions for improving water and soil quality, and boosting agricultural yields. Responding to growing demands, Ecological Labs recently undertook the sixth expansion of its Cape Coral research, manufacturing and distribution facility to 78,000 square feet.

"We are truly protecting our environment by offering solutions that benefit everyone. We

are doing our part to better the world," says Ecological Laboratories Inventory Control Coordinator Matthew Richter.

Find out more about the city's demographics, available sites and incentives for relocating your advanced manufacturing operation to Cape Coral.

For more information about the City of Cape Coral visit us online at [www.bizcapecoral.com](http://www.bizcapecoral.com)

## The Finishing Tech Touch



At Craters and Freighters of SW Florida, workers custom pack and ship items from fine artwork to super-ship equipment.

Francis Mosser took over Specialized Cabinetry and Components in Cape Coral in 2009, and invested in state-of-the-art, computerized equipment for creating custom cabinets and countertops. "That gave us the ability to expedite production immensely," he says. Today, Specialized Cabinetry employs 14 and generates \$2.5 million in annual revenue.

Tech and biotech are targeted industries for the Cape Coral Economic Development Office. Find out how to grow your tech company in Cape Coral—Southwest Florida's growth hotspot. Contact our team today.



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## Competitive location, cost of doing business

We are a six-county area located where I-80 crosses the Mississippi River in eastern Iowa and western Illinois. We are approximately 2 1/2 hours west of Chicago and midway between Minneapolis to the north and St. Louis to the south. Thirty-seven million people live within 300 miles of the Quad Cities region, which can put your business at the center of major markets and suppliers – all without paying major market prices!

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The Quad Cities region has an available workforce of 588,000 people to meet your labor needs. It's the workforce that fuels industry giants like John Deere, Arconic, 3M, the

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Rock Island Arsenal, HNI Corporation, Kraft Heinz, Steri-lite, XPAC and thousands of others. In addition, 40 colleges and universities within a 90-mile radius graduate 41,000 students each year. These educational institutions also work with area employers to provide robust workforce training resources.

## Competitively priced multi-modal transportation

Our integrated logistics infrastructure network includes access to road, rail, water, and air to meet your transportation needs. This encompasses an international airport, four separately designated U.S. interstate highways, multiple river ports, and three Class I rail lines. This also includes multi-modal trans-load facilities, allowing companies here to gain competitive pricing across multiple transportation modes. ▼



# Peoria AZ is the SMART Choice for Business Location

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Flip the script, why can't you experience life in the same place where you earn the right to have those experiences. Get off work and drive for 90 minutes in traffic or play the back nine at Blackstone. Spend 90 minutes with your family or with the radio. Love where you live, work where you live.

A cluster starts with one, are you going to lead or follow? One of many, or the one that leads the many. Untapped is cliché but real. The labor force is clamoring for a new place, a close place. They want their three hours back. You are not listening.

Why cluster in a hyper-saturated area with a depleted labor pool and a textbook example of sprawl. We have the workforce, the sites and, most importantly, the lifestyle you crave.

## Why Peoria?

Stunning natural beauty, talented workforce, activity-centered lifestyle, premier development sites and a business forward city leadership – Make the SMART choice.

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Peoria is a low-cost option for both business and workforce attraction when compared to Austin, Dallas, Denver, Salt Lake City, San Diego, San Francisco and Los Angeles.

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# '18

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Community population 50,000+



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#### ECONOMIC IMPACT DEAL OF THE YEAR

Recognizes a project having significant and measurable impact on a City, County and/or Region.

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Madison, WI (Large Division)

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#### ENTREPRENEURIAL AWARD

Unique approaches to enhancing the Entrepreneurial culture in a city or region. Unique approaches for assisting young companies through the start-up/early stage of a business life cycle.

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An overall comprehensive marketing program to market a community, county, state, or region to a prospect.

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Green Bay, WI (Large Division)

**Phelps County Nebraska Go! Website Marketing**

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**JobsNow Workforce Initiative**

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