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July 2013

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No matter what products you sell or what services you offer, Florida has a secure economy you can build your business on. Whether it's the **educated and ambitious workforce, easy access to international markets** or the **impressive consumer base** — business leaders worldwide are noticing great things about Florida.

Like Florida's **0% personal income tax** and how moving to Florida is like giving yourself and every employee a raise — without spending a dime.

"Working in Florida is like finding two hours a day," said one recent transplant. It's that amazing lifestyle — paired with an ideal business climate — that makes Florida the perfect location to expand your business.

Florida is the only place you can start the day watching the sunrise over the Atlantic and wrap it up admiring the sunset over the Gulf — with plenty of time to do business in between.

"People work their whole lives to end up in Florida," said one out-of-state executive, **"Why wait?"**

There's never been a better time to take advantage of everything that Florida has to offer. Your business can further succeed in the Sunshine State. **Consider Florida. The perfect climate for business.**



SITE SELECTION

VOLUME 58, NUMBER 4

THE MAGAZINE OF
CORPORATE REAL ESTATE
STRATEGY AND ECONOMIC
DEVELOPMENT

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ON THE COVER: The core image is of Sandia National Laboratories' scanning tunneling microscope (STM).
Photo by Randy Mantoya, Sandia National Laboratories.



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Start Me Up Hong Kong

Hong Kong has all the ingredients for technology companies of all sizes to turn innovative ideas into commercialization of new products and services for the global markets, from seed money and top class researchers, state-of-the-art infrastructure, research funding and a robust legal system with full intellectual property protection, to complete supply chain solutions from prototyping, product design, small quantity sampling to market testing, sourcing, production, quality control, sales and marketing, logistics and customer services.



Tech Startups

Forbes recently rated Hong Kong as number one in the world's top four tech capitals to watch (after Silicon Valley and New York).

Invest Hong Kong, the department of the Hong Kong SAR Government responsible for Foreign Direct Investment, is developing a virtual platform and the Start Me Up Hong Kong Entrepreneur Awards and Forum to promote Hong Kong as a premier startup destination in Asia and attract global entrepreneurial talent, especially in the fields of technology and creative industries.

Hong Kong offers all that a technology startup needs to grow and become a profitable business. It is simple to set up a business in Hong Kong. In one day and for a low cost a company can be up and running. More importantly, Hong Kong offers a level playing field for all; the same rules apply to local and foreign-owned companies.

Opportunities abound for technology ventures, especially in

the following areas:

- Energy efficiency, clean tech, waste management, water treatment, green consumer products and other sustainable technologies
- Financial technology
- Medical and health devices and technologies
- ICT and other technologies that promote connectivity, productivity, knowledge

Start Me Up Hong Kong Entrepreneur Awards and Forum 4 – 7 December 2013

The four-day programme comprises:

- Start Me Up HK Forum
- Market briefing by InvestHK
- Pitching skills workshop
- InnoAsia
- Business of Design Week
- Innovation Design Technology Expo
- World SME Expo

Entry Criteria

- Early to growth stage ventures from around the world
- Have entered the market with recognisable traction
- Innovative, scalable and sustainable business
- Demonstrate positive economic, social and / or environmental impact

For more details and application, please visit startmeup.hk or contact InvestHK now:

US Offices:

New York:

D. Kelly Jones, Head of Investment Promotion

T: (212) 752 3320 ext 213 E: kelly_jones@hketony.gov.hk

San Francisco:

Lawrence Tang, Head of Investment Promotion

T: (415) 835 9318 E: lawrence_tang@hketosf.gov.hk

Hong Kong:

Simon Tsang, Head of Innovation & Technology

T: (852) 3107 1013 E: stsang@investhk.gov.hk

Wendy Chow, Head of Information & Communications Technology

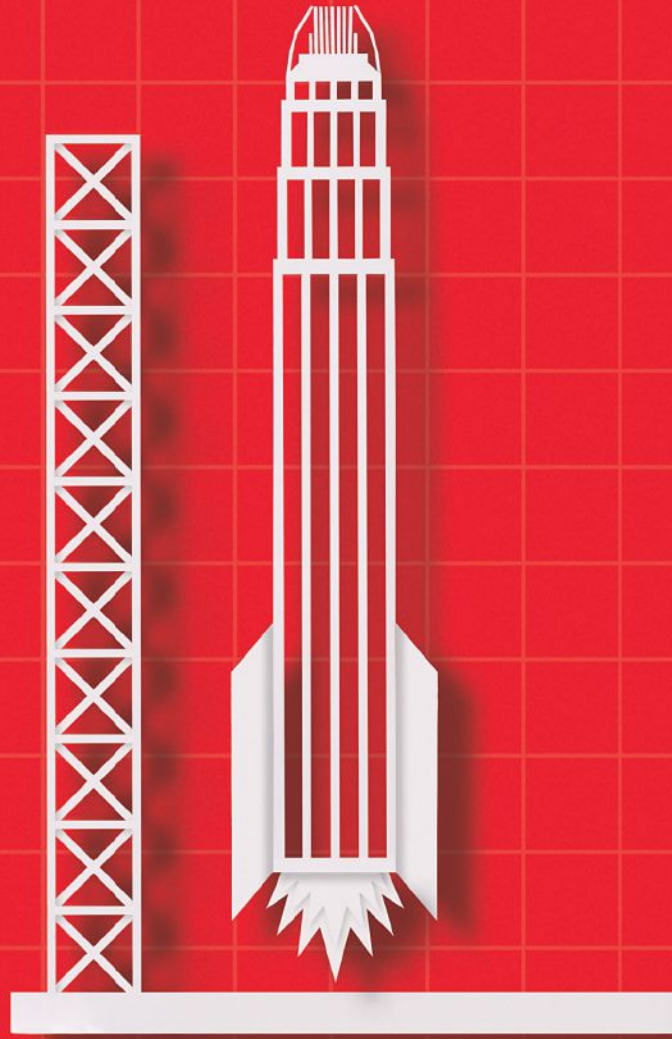
T: (852) 3107 1012 E: wchow@investhk.gov.hk

Doris Fong, Head of Creative Industries

T: (852) 3107 1011 E: dfong@investhk.gov.hk



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New York office: D. Kelly Jones
Tel: (212) 752 3320 ext 213 Email: kelly_jones@hketony.gov.hk

San Francisco office: Lawrence Tang
Tel: (415) 835 9318 Email: lawrence_tang@hketosf.gov.hk

Head office: 25/F, Fairmont House
8 Cotton Tree Drive, Central, Hong Kong
Tel: (852) 3107 1000 Email: enq@investhk.gov.hk

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Reader Survey: We're on the Right Track

Results of our summer 2013 reader survey became available as this issue went to press — literally. But rather than wait until the September issue to thank the several hundred of you who participated and to share the findings, I am doing so here in the July issue. The results are that significant.



by **MARK AREND**
mark.arend@siteselection.com

Most gratifying is the fact that 85 percent of respondents consider Site Selection to be the most reputable publication in the industry. We're working on the other 15 percent.

My colleagues and I spend valuable time on our electronic newsletters — the Site Selection Energy Report, Life Sciences Report, Aerospace Report, Site Selection International and the Site Selection Dispatch. So we are more than pleased to learn that 75 percent of respondents find these publications somewhat or very valuable. This is a good opportunity to thank Managing Editor Adam Bruns, who writes copiously for these newsletters, our regular contributors and our internal staff — Ben Yawn and Marea Giles — for their excellent work in this regard.

Let's turn now to the content survey participants value most: Our state and regional spotlights and industry reports are a virtual first-place tie, followed by our economic development rankings. Placing third, at about the same response rate, are the cover stories and North American Reports. I would venture to say that the state and regional spotlights and industry reports rank as high as they do because they tell the story of capital investment projects in areas or business sectors from the perspective of actual investors. We know that is what matters most to you, the reader, and we know you expect to find that perspective consistently in our pages.

Perhaps that's why only 12 more respondents rate the Wall Street Journal (35 percent) as more useful

professionally than Site Selection (32 percent) — we'll take it. No other publication on the list of options provided in the survey comes anywhere near these percentages. And none of the other economic development publications rates higher than 4 percent in this regard, with most well below that. Seventy-nine percent of respondents name Site Selection as their first, second or third most useful publication professionally.

The most important topics we cover, according to survey results, are site location case studies, local and regional economic development trends and industry location trends (tied for second place) and tax and incentives issues. We will continue to deliver that material and content related to other high-scoring topics — corporate asset management strategies, work-force trends and infrastructure developments.

Respondents most apt to relocate or expand operations will most likely do so in the U.S. Southeast (37 percent), Midwest (32 percent) or the West (28 percent), which closely tracks our business climate barometers and those of other such analysts.

My colleagues and I will digest these and other findings in the weeks ahead in order to fine tune our content where necessary. We intend to remain the most reputable and useful publication you can turn to for the intelligence you require. If you are among the 15 percent for whom that is not the case, let us know why. Either way, we thank you for your survey participation and for your readership.

Till next time,

Mark Arend
Editor in Chief



Founder MCKINLEY CONWAY
Publisher/President LAURA LYNE
Managing Director ADAM JONES-KELLEY
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Editor in Chief MARK AREND
Managing Editor ADAM BRUNS
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Production Coordinator/Graphic Designer BOB GRAVLEE
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GLOBAL SALES & MARKETING

Regional Marketing Director CATHY MCFARLAND
Director Southeast Sales STEVE JABON
Regional Marketing Director MIKE GLENNON
Regional Marketing Director PAUL NEWMAN
Dir. of International Operations ANNE HARDY
Chief Operating Officer, Asia PATRICK TEH, +60-1-2362-1289
Director of Custom Content CHARLES FITZGIBBON
Canada GREG SMITH & DAVID SEABERG, 905-625-9631
Central & South America ESTUARDO ROBLES, 540-999-8282
Germany OLIVER OBERMANN, +49 (0) 341 90 97 90 00
Korea CHUL LEE, +82 2 466 5595
India KAVAN BHANDARY, +91 22 401 47637
Malaysia Y.T. SIA, +60 3 5611 0101
Hong Kong and Macau RANA RIZVI, +852 2516 1516
Taiwan JANET CHEN, +886 2 2767 7390
Thailand STEVEN FONG, +66 2 651 9273
Japan HIROKO MINATO, +81 3 4455 3078
Australia PATRICK FRANZ, +61 416 118 522
Staff Photographer SOO JONES-KELLEY

Sales Admin. Coordinator EMMY BERRIOS
Marketing Assistant ANNIE MUNZA

BUSINESS DEPARTMENT

Director of Business and Finance DEBBIE PORTER
Accounting Assistant EMILY DIXON

CIRCULATION

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DIGITAL TECHNOLOGY TEAM

Information Manager MIKE O'CONNOR
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Webmaster Assistant MAREA GILES

ASSOCIATION MANAGEMENT SERVICES

AMBER GETSINGER, AUBREY GLAZMAN, RYA HAZELWOOD, PAULA KOROWIN, HAZEL PANKEY, JOEL PARKER, CATHY PIERCE, JOY POOLER, MICHELLE ROY, MANDY CASH

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PHONE: (770) 446-6996 • FAX: (770) 263-8825 • TOLL FREE: (800) 554-5686
E-MAIL: editor@conway.com WEB: www.siteselection.com



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Jimmy Barnes, SIOR
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www.naicarolantic.com

SC-Charleston/Columbia
NAI Avant
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803.744.9811
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SC-Greenville
NAI Earle Furman
Earle Furman, SIOR
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www.naiclarksville.com

TN-Knoxville
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www.naiknoxville.com

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Edward Saig, SIOR, CRE
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www.saigcompany.com

Washington/Northern Virginia
NAI KLNb
Andrew Georgelakos, SIOR
202.420.7760
www.naiklnb.com

Down Under On Top

by ADAM JONES-KELLEY
adamjk@siteselection.com



My father once mused that Australia and New Zealand exist so the rest of the world has something to envy.

He's not alone in that opinion.

In the Economist Intelligence Unit's (EIU) most recent global livability report six cities Down Under ranked among the

10 best on earth.

These two remarkable countries at the bottom of the world house 3 percent of the world's population, but 60 percent of the world's best cities.

Enviably.

Both countries' economies rank among the world's safest for foreign direct invest-

ment, according to the Dun & Bradstreet *Global Risk Indicator*, and Australia is viewed as one of the world's most stable investment climates. A new report from PricewaterhouseCoopers predicts that Australian entrepreneurs could soon outpace their American counterparts, adding 540,000 new jobs by 2033 and accounting for 4 percent of GDP.

Not bad for a country with fewer people than Texas.

Before Crocodile Dundee

As you may recall, these two wildly successful nations grew from somewhat humble beginnings.

Australian schoolchildren are taught that in 1770 James Cook sailed his mighty ship the HMS *Endeavour* half way 'round the world, discovered Australia and New Zealand, and planted the Union Jack, claiming the land for Great Britain.

Never mind that Cook wasn't actually captain of the *Endeavour*, or that the ship's primary mission was to measure, from Tahiti, Venus' transit across the sun and assist European astronomers in



Sydney, Australia

© Tourism Australia/Photo by Robert Wallace

calculating Earth's distance from it. Or that the Portuguese had visited 200 years earlier, even leaving behind a couple of cannons. History, as is so often the case, has been tidied up and re-packaged, and most locals will look at you askance if you suggest anything other than the generally accepted version of events.

Cook described *Terra Australis Incognita* (Latin for "the unknown land of the South") as lush, green and abundant with life, an account so absolutely accepted in London that, 17 years later, the British government dispatched 11 ships carrying 1,500 people on a one-way junket to colonize Australia.

That squadron, reverently referred to now as the "First Fleet," was not exactly a Carnival cruise (though the odds of a successful voyage were probably about the same). In fact, the First Fleet, revered or not, was a convoy of prison ships, packed to the gunwales with excess victims from Britain's overcrowded prisons and over-active judicial system. (Well, over-active if you were poor.)

British authorities (i.e., the ruling class), in an effort to cleanse undesirables from the homeland, sentenced them to seven years of fighting for existence on this isolated continent. They, of course, made no provision for a return to jolly ole England after the seven-year term, so this was



Auckland, New Zealand

Photo by Chris McLennan

usually a life sentence, but one ruefully accepted, since the alternative was a slow and painful death back home. (British statute books were chock-a-block full of capital offenses in the 1700s and 1800s. There were 222 crimes for which one would be hanged, boiled or burned to death, including robbing a rabbit warren, cutting down a tree or impersonating an Egyptian.)

And you think the U.S. government is loony?

In 200 years, America went from George Washington to The Kardashians. In that same span Australia went from prison inmates to Hugh Jackman. Score one for the Aussies.

In fact, score a bunch for the Aussies and Kiwis both:

- Forbes ranked New Zealand as the "Best Country for Business" in 2012, and ranked both Australia and New Zealand among the top five "Happiest Countries on Earth."
- New Zealand was also ranked as the "Top Country for Business" by Transparency International's Global Corruption Index.
- According to the World Bank, in 2012 New Zealand was first in the world for protecting investors.

Born to Bounty

The EIU recently ranked 80 countries on analysis of 11 statistical indicators including national wealth, political freedom, life expectancy, crime rates, weather and family ties. The study pronounced Australia the second best country to be born in, in 2013, and forecast a bright future for those currently dirtying diapers Down Under (although wee Australians dirty their "nappies," not their diapers).

Captain Cook described Australia as lush and green, but that's because he only saw the edges. True, the country is rimmed by a thin belt of beautiful, bountiful land. The rest of it is the great, stark desert that Australians call the Outback. The Outback has absolutely nothing — except a world of mining minerals and resources.

The Australian Outback boasts the world's largest reserves of brown coal, mineral sands (rutile and zircon), nickel, lead, silver, uranium, iron ore and zinc, and the world's second largest reserves of bauxite and tantalum. Australia possesses the world's third largest reserves of copper, and the mining and minerals industry as a whole was a whopping \$100 billion



© Tourism Australia/Photo by Richard Powers



“Beware of the volatility!”

— Riki Polygenis, senior economist, ANZ Research

industry in FY 2010-2011. That figure promises to rise as emerging economic

superpowers like China continue to gobble up resources at a near-desperate pace.

New Zealand remains one of the world’s leading agricultural exporters, though the nation’s economic focus has expanded in recent years, developing thriving biotech and digital media sectors. (In a country of 4 million people the biotech industry, including nutraceuticals, supplements and functional foods, generated revenues of \$760 million in 2008 and 2009 alone.)

Decades of free-market reforms in New Zealand removed many barriers to foreign direct investment, earning praise from the World Bank, which in 2005 named New Zealand the most business-friendly country in the world.

Envy With Caution?

Australia’s unemployment has hovered around 5.5 percent for much of the last year, a figure most Western nations would fall all over themselves crowing about. But Riki Polygenis, a senior economist with ANZ Research, warns that all may not be as rosy as that sterling stat would

suggest. “Beware of the volatility!” cautions Polygenis, noting that the staggering monthly employment gain in February of nearly 72,000 “was subsequently followed by a fall of 31K in March and a rise of 50K in April. Looking through the volatility, trend employment growth is currently tracking at 16.5K per month, which is not fast enough to keep up with trend labor force growth of 22.8K per month.”

Though that’s quite a rollercoaster for a nation of only 22 million people, I’m guessing the United States would love to have such problems.

Though the recent resources mining boom shows little sign of slowing, many economists have urged Australia’s government to capitalize on these heady days by focusing their efforts and incentives on expanding other key industries like clean energy, life sciences and advanced manufacturing. Ms. Polygenis remains cautious, however, pointing out that “the outlook for the labor market is a little more unsure (ANZ Research is forecasting a rise to 5.75 percent by the end of the year), with the transition away from mining investment to other areas of economic growth unlikely to be smooth.”

She’s more bullish on the state of New South Wales, predicting they’re “best positioned for growth after many years

of underperformance ... underpinned by [significant] infrastructure spending.”

Bridges are crumbling across America and Congress wonders how to fund (or, lately, how not to fund) the necessary infrastructure investment. In Australia they fret about unemployment rising to 5.7 percent. Feeling envious yet?

Go Here!

And then, of course, there’s tourism, the industry responsible for 10 percent of New Zealand’s GDP; the industry that contributes approximately \$75 billion to Australia’s economy annually, good for 3 percent of GDP. Ask anyone who’s been and they’ll tell you they can’t wait to get back; these two countries are simply that beautiful. (This magazine was tempted simply to write “Go Here” on pages of stunning pictures.)

Australia and New Zealand are some of the most diverse, stunning, welcoming lands on this planet. Whether it’s sitting in a cafe in Devonport, watching the sails in Auckland Harbour, strolling round the base of mighty Uluru in Australia, or diving the majestic Great Barrier Reef, there’s a sense of peace here, of expectant wonder.

As the actor Russell Crowe, himself a Kiwi who lived in Australia, once said, “God bless America. God save the Queen. God defend New Zealand and thank Christ for Australia!”

Yeah, life is good Down Under. Go envy for yourself. ▼



Glen Orchy/Queenstown, New Zealand

Photo by Soo Jones-Kelley

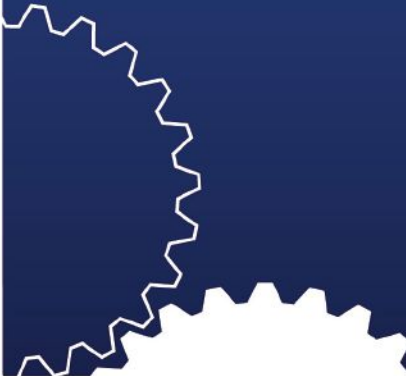
RANKED **BEST** MIDWEST STATE

IN CHIEF EXECUTIVE'S "BEST AND WORST STATES" SURVEY. May 2013



Indiana

A State that Works



AStateThatWorks.com

by **ADAM BRUNS**
adam.bruns@siteselection.com

Hey Lolly Lolicup

While economists fret over bubbles of another kind, the leading maker of bubble drinks is stretching its wings. **Lollicup USA Inc.**, the specialty beverage manufacturer, supplier and retailer, is moving from 140,000 sq. ft. (13,000 sq. m.) in two separate locations in Walnut and Industry, Calif., to one shiny new 300,300-sq.-ft. (27,898-sq.-m.) facility in the San Bernardino County community of Chino. The company plans to add to its payroll of 150 once the relocation is complete in mid-third quarter 2013.



"We are bringing manufacturing back to the US," said Alan Yu, president and CEO of Lollicup. "In addition to our corporate headquarters, our new space will house a state-of-the-art manufacturing facility for paper and plastic disposable goods. We are moving our manufacturing from Asia to California to shorten our customers' lead times and to meet increased demand for our products." Lollicup pre-leased the building, called the First Chino Logistics Center, in March from First Industrial Realty Trust.

The supply-constrained Chino area marks the intersection of four major counties in the greater Los Angeles area. "It's exciting to see manufacturers look to this region to build their operations," said Kelly Reenders, economic development agency administrator, County of San Bernardino.

Lollicup started the Boba Milk Tea movement with the opening of its first store in San Gabriel, Calif. Five more stores quickly followed, and today the company has stores in 11 states. The company plans to expand its stores overseas to Dubai and China next.



Powered by Muncie

DD Dannar LLC, a producer of alternatively powered heavy equipment for the governmental sector, announced in June it will create 288 new jobs and will invest as much as \$4.65 million in real estate improvements, equipment, and technology over the next four years in Muncie, Ind. The average pay rate of the new jobs is projected to be \$27.33 per hour. The company will initially occupy 25,000 sq. ft. (2,322-sq.-m.) in the Delaware County-owned Business Center facility. Additional space will be added as the company grows at the former Twoson Tool facility.

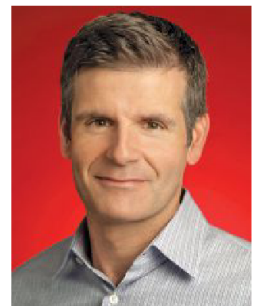
The plant will produce the Dannar Mobile PowerStation®, the first vehicle of its kind to combine battery electric power with a hydraulic drive-train, designed to perform maintenance and provide supplemental off-grid power. Hiring projections call for 20 employees in the first year, growing to 479 in year five. "Muncie has the right people to produce the Mobile PowerStation with quality and pride," said Gary Dannar, CEO and Founder of DD Dannar LLC.

Motos and Macintoshes Rev Up in Texas

At The Wall Street Journal's AllThingsD conference in late May, Dennis Woodside, CEO of Google's **Motorola Mobility**, announced that every single new Moto X smartphone sold in the US would be assembled at a former Nokia facility in Fort Worth, Texas, that will employ up to 2,000 people.

"There were a few reasons why we decided to do this," said the company, beginning with proximity to engineers and designers at the company's Silicon Valley location and at its headquarters in the Chicago suburb of Libertyville. "We'll be able to iterate on design much faster, create a leaner supply chain, respond much more quickly to purchasing trends and

(continued on page 16)



**Dennis Woodside, CEO,
Motorola Mobility**



The Future's Made in Marysville

"The location of this facility is in the midst of one of the greatest collections of engineering and production talent in the world," said Hidenobu Iwata, president & CEO of **Honda of America** in May. Iwata was talking about central Ohio, where the company has continued to build its own cluster over the past 30 years.

That cluster will now see a \$70-million expansion in the form of a new 184,000-sq.-ft. Performance Manufacturing Center to produce the Acura NSX supercar. The facility will be housed inside Honda's former North American Logistics facility in Marysville. Honda's third auto plant in Ohio, it will be only a few miles from the Honda R&D Americas, Inc. Ohio Center that is engineering

the supercar for production and adjacent to Honda of America Mfg.'s Marysville Auto Plant. The Performance Manufacturing Center also is close to Honda Engineering North America, Inc., center for the development of new production technologies.

Associates at Honda's engine plant in Anna, Ohio, will assemble the NSX powertrain. The new plant's approximately 100 manufacturing associates will be drawn from within Honda's existing operations in Ohio. The new NSX is being developed by a global R&D team led by designers and engineers at Honda R&D Americas, Inc. located in Los Angeles, Calif., and Raymond, Ohio. Honda R&D Americas chief engineer Ted Klaus is leading the global team developing the new NSX, and Clement D' Souza, associate chief engineer at Honda of America, is leading the team that will bring NSX to mass production in 2015.

"This new plant will be as unique as the vehicle we will build here," said D'Souza. "In creating the plan for this plant, we looked closely at each process and determined the perfect blend of associate craftsmanship and technology to adopt a new approach to manufacturing."

The next-generation NSX will be built exclusively at the all-new Performance Manufacturing Center. In addition to being sold in North America, the NSX will be exported to customers throughout the world.

Also in May, the company announced a \$470-million investment in a new transmission plant in Celaya, Mexico, that will employ 1,500. Like the NSX, the plant is expected to reach production status in 2015.

The original Acura NSX was built at the Takanezawa Plant in Japan from 1990 until production moved to the Suzuka Plant in early 2004, where it was produced until 2005. Part of the Tochigi Factory, the Takanezawa Plant was the first

manufacturing facility in the world to mass-produce an all-aluminum body and balance advanced production equipment with hands-on "craftsman" processes.

Ron Lietzke, spokesman for Honda North America, Ohio, says the new supercar "will be unique in terms of what materials go into it." He calls the company's level of activity in Ohio "amazing — not just the volume of activity, but the capabilities here."



The all-new Acura NSX supercar will be produced at a new Performance Manufacturing Center in Marysville, Ohio. Ohio Governor John Kasich (r.) joined Hidenobu Iwata, president & CEO of Honda of America and the head of Honda's manufacturing operations in North America, next to the Acura NSX Concept on display at the May event announcing the project.



Steel and Aluminum, Living Together

One of Honda's award-winning OEM suppliers for 2012 is expanding in Kentucky, and its sister company is celebrating a major JV project in northwest Ohio.

On May 15, **Kobe Aluminum Automotive Products, LLC (KAAP)**, broke ground to expand its manufacturing facility in Bowling Green, Ky., and increase production of aluminum forgings for automotive suspension systems. KAAP will invest \$66 million to build an 87,000-sq.-ft. (8,082-sq.-m.) addition to its existing facility and is adding 100 more employees. The new production lines are anticipated to start up in spring 2014.

"Kobe Steel had many options when we decided to establish this business in Bowling Green," said Susumu "Sam" Koike, president of KAAP. "We have had great experiences working in Kentucky, and we have never regretted our decision. The state of Kentucky made the decision for additional investment easy by offering financial incentives."

"The investment in this Continuous Annealing Line represents more than just the future of this facility — it also represents the future for automotive steel products and the applications in which they are used."

— John Surma, Chairman and CEO, U.S. Steel

Support also came from TVA, Warren Rural Electric Cooperative Corporation and Bowling Green Area Chamber of Commerce. KAAP plans to expand to a minimum of 320 jobs to its payroll of 220 by mid-2016 as a result of the expansion.

KAAP, a joint venture of Kobe Steel Ltd., Mitsui & Co Ltd. and Toyota Tsusho Corporation, has been operating in south-central Kentucky since 2005. There are 11 Kobe Steel subsidiaries in the United States, but the Bowling Green location is Kobe Steel's only U.S. facility to forge for the automotive industry.

One that anneals is celebrating its own growth in Leipsic, Ohio, where Kobe and United States Steel Corp. leaders on May 13 formally commissioned the new Continuous Annealing Line at their joint venture **PRO-TEC Coating Co.** PRO-TEC will now process some of the strongest and most formable grades of steel in North America. The new grades will assist automotive manufacturers in reaching the 2025 Corporate Average Fuel Economy (CAFE) standards of 54.5 miles per gallon for their passenger vehicle fleets.

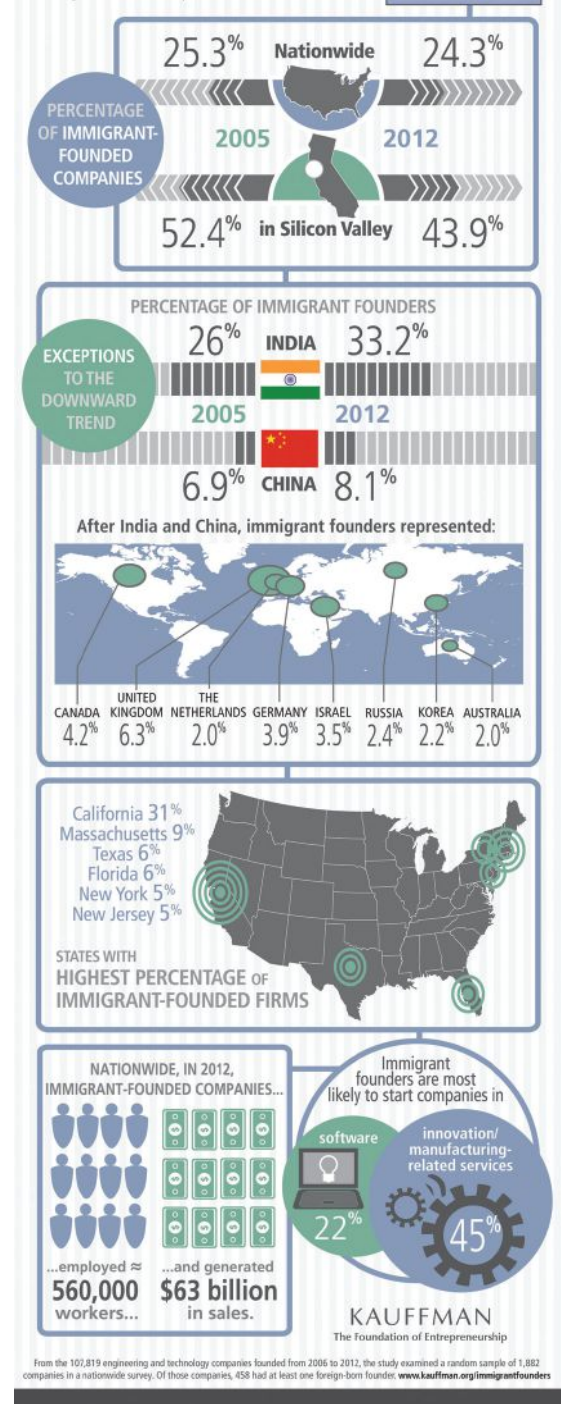
"The investment in this Continuous Annealing Line represents more than just the future of this facility — it also represents the future for automotive steel products and the applications in which they are used," said U.S. Steel Chairman and CEO John Surma.

PRO-TEC said the use of high-strength steels has doubled in number in the past decade, and as a result they are "the fastest growing materials in the car." The commissioning event is a culmination of a \$400-million capital investment by the partners into PRO-TEC. Announced in late 2010, the investment created 500 temporary construction jobs as well as 80 full-time jobs.

Internationally, Kobe Steel is consolidating work and closing one of its main steel works in Japan, and in April announced the completion of a \$47-million second-phase expansion of its KAAP (China) Co., Ltd. JV in Suzhou, Jiangsu Province, China.

Immigrants and Entrepreneurs

A new Kauffman Foundation study finds that the number of high-tech, immigrant-founded startups—a critical source of fuel for the U.S. economy—has stagnated and is on the verge of decline. "America's New Immigrant Entrepreneurs: Then and Now," which evaluates the rate of immigrant entrepreneurship from 2006 to 2012, updates findings from a 2007 study that examined immigrant-founded companies between 1995 and 2005.



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A SUPERCAR NEEDS A SUPER REGION.



Acura's new supercar, the NSX, will be produced in Marysville, Ohio. Of course, this technological marvel will feel right at home with a workforce that Hidenobu Iwata, the president and CEO of Honda of America, called "one of the greatest collections of engineering and production talent in the world."

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Honda products are produced using domestic and globally sourced parts.

Motos and Macintoshes (continued from page 12)

demands, and deliver devices to people here much more quickly. The Fort Worth site will also benefit from proximity to a non-US location that went unmentioned: the company's service and repair operation in Monterrey, Mexico (pictured).

Google purchased Motorola Mobility in 2012 for \$12.5 billion.

The new 481,000-sq.-ft. (44,685-sq.-m.) site, closed by Nokia in 2007, is located in

a foreign trade zone at Alliance Texas. It will be operated by Motorola's Singapore-based manufacturing partner Flextronics, which also assembles smartphones for Motorola in Brazil and China.

Taiwanese electronics firm Q-Edge in March 2009 announced it would create 500 jobs at the Nokia site. Reporting in April by the Fort Worth Star Telegram found that Hillwood Properties, owner and developer

of Alliance Texas, was investing \$3.3 million in renovations at the property so that Flextronics could move in. The paper received no response from Q-Edge or its parent company Hon Hai/Foxconn about whether Q-Edge was still a tenant, and found that the company had never followed through on an approved local tax abatement related to the project.

Apple's Growth Continues

A week earlier in May, **Apple** followed up its recent location of a campus in Austin by announcing it would begin to assemble some Mac computers at a \$100-million plant somewhere in Texas. Apple also works with Hon Hai/Foxconn, whose working conditions at its Chinese plants came under heavy criticism in recent years.



Tim Cook, CEO, Apple

In late May congressional testimony defending the company's tax planning practices, Apple CEO Tim Cook said, "while the overall size of the domestic work force has stagnated during the last ten years, Apple has increased its US work force more than five-fold, from fewer than 10,000 in 2002 to approximately 50,000 today."

He then detailed its investments in that time frame: 250 retail stores; substantial domestic R&D; the new Apple Campus 2 in Cupertino, Calif.; a \$100-million, 1-million-sq.-ft. (92,900-sq.-m.) campus in Austin; two new data centers under construction in Oregon and Nevada and the forthcoming Mac manufacturing.

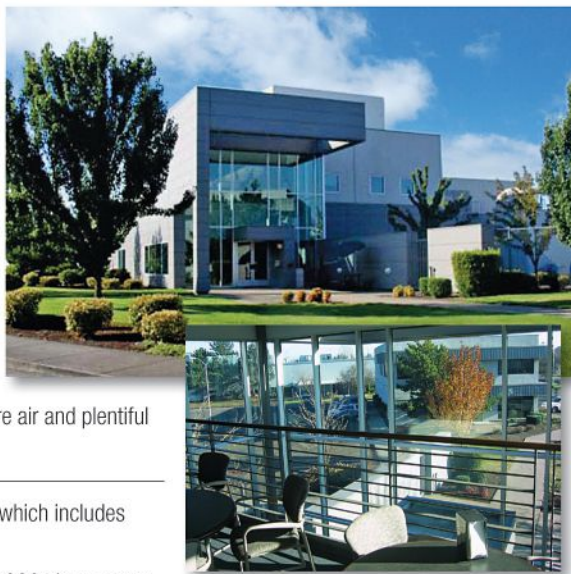
"Apple's investments over the past decade have resulted in the creation of entirely new products, product categories and industries," he said with typical non-PC bravado. "The company estimates that it has created or supported approximately 600,000 jobs for American workers."

The company also estimates another 290,000 jobs related to the "App economy" created by its App Store, which marked its 50-billionth download on May 16.

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Joseph "Jack" Fox
Ph# 503-581-8900
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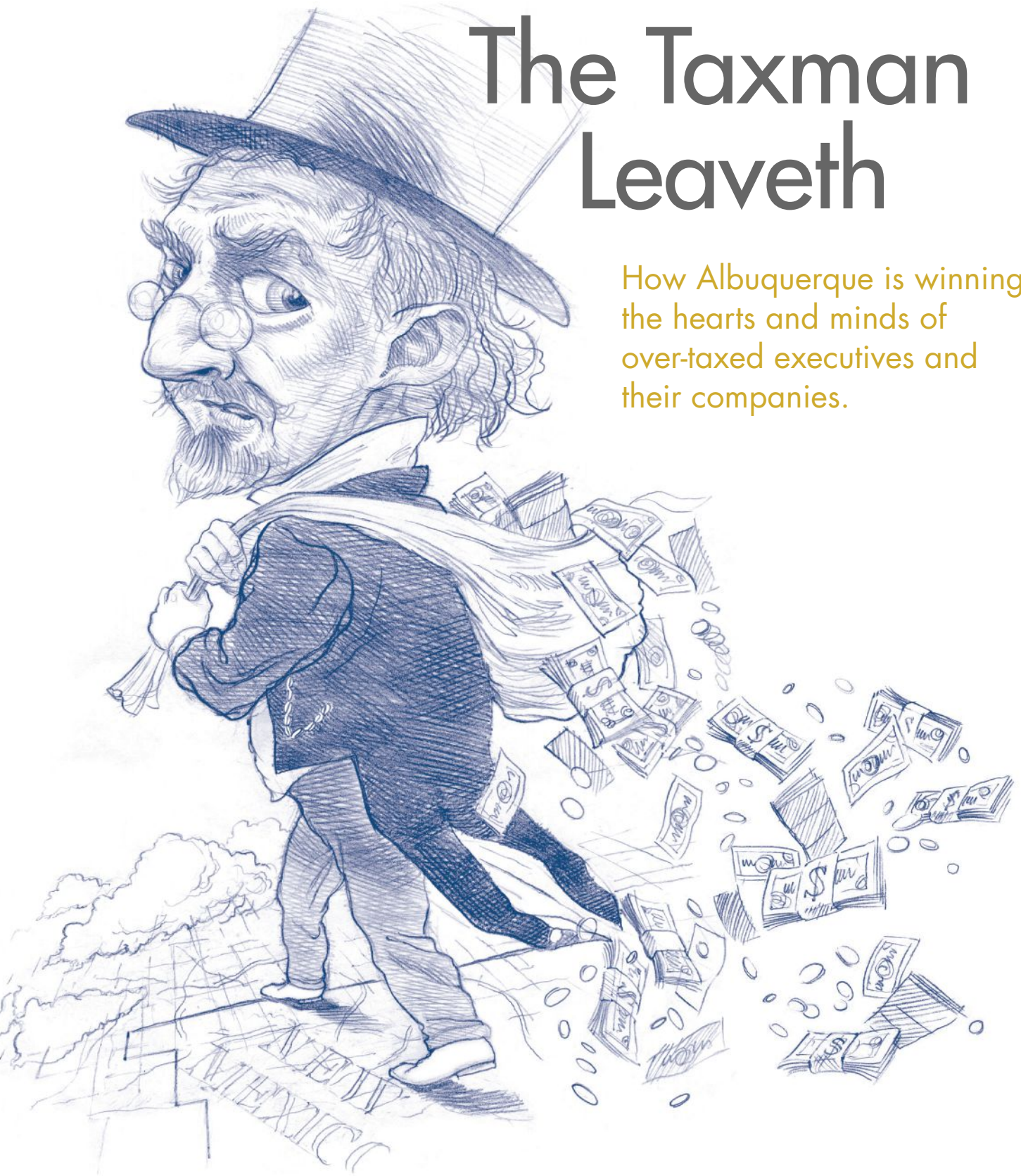
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The Taxman Leaveth

How Albuquerque is winning the hearts and minds of over-taxed executives and their companies.



Few things get companies as excited as waving goodbye to corporate taxes.

On March 16, New Mexico Gov. Susana Martinez signed House Bill 641 into law, resulting in what many believe is the most important improvement to the state's tax climate in its 101 year history.



“Albuquerque’s skilled work force and low operating costs help drive industry expansion.”

— Mayor Richard J. Berry

Generally, when the conversation turns to house bills and tax law, normal human beings tend to doze off. But hang in there. The news from Albuquerque is actually exciting — especially when phrased in terms of how this legislation affects you, the corporate investor, and your site location plans.

First, the new tax package allows

manufacturers the option of electing the single sales factor in computing corporate income taxes. Moving to a single sales factor means that companies may now elect to be taxed only on sales to customers in New Mexico. That will effectively eliminate corporate income taxes for most manufacturers.

The legislature also approved a 22

percent reduction in the top corporate income tax rate, to be lowered to 5.9 percent over the next five years.

And completing the business climate trifecta in this legislative session, leaders also eliminated what was known as the Throwback Rule, ensuring that manufacturers who sell products into states where they don't have nexus will not face any tax penalty.

This package follows tax relief enacted last year that phases in the complete elimination of gross receipts (sales) taxes on electricity and other consumables used in the manufacturing process.

With these bold moves and New Mexico's incentives, the state has upped the ante to win more corporate investment. When phased-in, New Mexico will offer manufacturers the lowest effective tax rate (2 percent) in the Western U.S., according to a major study by one of the Big 4 accounting firms.

New Mexico's communities, including Albuquerque, stand poised to reap the benefits.

One company already reaping the rewards of New Mexico's tax law changes is mattress maker Tempur-Pedic. The Lexington, Ky.-based manufacturer opened the world's largest mattress factory in Albuquerque in 2007. The 800,000-sq.-ft. plant employs 188 workers.

Amy Thomas Laub, director of state and local tax for Tempur-Pedic, was a member of the corporate team that negotiated the incentives package for the company back in 2004 and 2005.

“We will be benefitting from the tax law



changes,” she says. “The way the legislation is written — adoption of the optional single sales tax factor for manufacturers — calls for a five-year phase-in beginning in 2014. Instead of averaging property, payroll and sales, you allocate your income based on a single sales factor only.”

The elimination of the Throwback Rule is especially helpful to Tempur-Pedic, notes Thomas Laub.

“Other things that are really good about Albuquerque are the incentives and the credits,” she says. “The high-wage jobs tax credit and the investment tax credit are both very beneficial to manufacturers.”

Thomas Laub says she also likes the state’s Job Training Incentive Program (JTIP), which provides cash reimbursement for up to 1,040 hours of on-the-job training for each new employee.

The United Nations’ Investment Advisory Series report on Trade & Development calls aftercare “A Core Function in Investment Promotion.” Whether you call it aftercare, retention or continuing development, the goals are the same: create an environment for your existing companies

to succeed and grow. A job saved is a job earned, and the manufacturing plant a local economy keeps from moving to another city is every bit as important as

innovative work force and competitive state tax code and we have a lot to offer any company that wants to start up, grow or relocate.”

“**100,000 college students in New Mexico are ready to bring their talents to area employers.**”

— Maggie Hart Stebbins, Chair of Bernalillo County Commission



the splashy new investments that garner so many headlines.

Albuquerque already enjoys a thriving high-tech industry, one that’s long recognized the substantial benefits of locating near government brain-power reservoirs like Sandia National Labs and the Air Force Research Laboratory.

“Albuquerque is a ‘mind to market’ technology and research hub,” says Mayor Richard J. Berry. “Combine that with our

Diversification Success

“We have a growing economy benefiting from the diversification of our industry and the 100,000 college students in New Mexico are ready to bring their talents to area employers,” said Maggie Hart Stebbins, Chair of the Bernalillo County Commission.

The industries below have clus-

A wide-angle photograph of the Albuquerque Sunport at sunrise. The sky is a mix of orange, yellow, and blue. In the foreground, there are airport buildings, runways, and taxiways. The background shows a range of mountains under the bright sky.

Sunrise over the Albuquerque Sunport, which has a new 84-acre on-airport site available for development.

ters in Albuquerque and well established supply chains supporting them. Each will benefit from the new tax structure, with many already announcing new hiring and expansion.

Aviation and Aerospace

Eclipse Aerospace, producer of “the World’s Most Efficient Very Light Jet,” has announced new hiring at their aircraft production facility.

The maker of this small jet aircraft officially opened its new 215,164-sq.-ft. production plant adjacent to the Albuquerque International Sunport in April. The facility employs more than 200 workers and has the capacity to produce up to 120 jets a year.

“What compels us to be here, number one, is the moderate, year-round climate,” says Edward Lundeen, senior vice president of business operations for Eclipse. “We are an aviation company. We sell and fly aircraft. You can basically fly 365 days a year here. There is no extreme hot or cold here. This is a good all-weather airport.”

At 14,000 feet, it also has one of the longest runways in North America.

“Plus, the cost of living is very attractive here,” adds Lundeen. “It is a very affordable environment. And a large, able and available work force is here.”

Lundeen notes that economic incentives were a driver of the company’s initial decision to locate in Albuquerque. “Legislation was passed to establish no fly-away tax,” he says. “That is, there is no sales tax on aircraft on the day of delivery. There is no sales tax on parts and service either. That makes it very attractive to deliver aircraft out of New Mexico. That law was passed

pany has 53,550 sq. ft. of service space plus another 50,000 sq. ft. of class A office space next to the airport.

“We are now taking orders for the Eclipse 550 — an enhancement over the 500,” Lundeen says. “The avionics in it are better. It has synthetic vision, enhanced vision, auto-throttle, dual IFMS, anti-skid brakes, glass wind screens and other features not normally found in this class.”

Eclipse will deliver its first 550 by the third quarter of this year, 10 total jets this year and 35 next year as the firm ramps up



“Albuquerque has an incredible work force — super smart, motivated — they make excellent employees.”

— John Killoran, @Pay

in order to induce the company to come and stay here — and it worked.”

Lundeen adds that “the new single sales tax provision is another huge inducement. Albuquerque is a business-friendly environment. That has helped us implement a lot of new programs without a lot of pain and suffering.”

Eclipse maintains five different facilities, four of which are at the airport. In addition to the assembly space, the com-

to 120 a year at full production. The base cost of the 550 is \$2.895 million.

Other big players in the Aviation and Aerospace Industry include:

- Bendix/King, one of the world’s leading manufacturers of innovative flight instruments and avionics systems, moved its headquarters to Albuquerque from Kansas in 2012 and is already expanding its avionics operation.



Photo courtesy of the University of New Mexico

- Aspen Avionics, which specializes in bringing advanced technology and capability into general aviation cockpits, is enjoying international success.
- Ultramain Systems, which for three decades has provided software and support to aviation and logistics companies through offices around the world, has its global headquarters in Albuquerque. This integrated maintenance and logistics software company replaces an aircraft's paper flight logs with an easy-to-use, touch-screen interface that speeds communication between cockpit crews and ground maintenance teams. Airline customers include British Airways and Singapore Airlines, and Virgin Galactic recently selected Ultramain to support its space flights from Spaceport America in southern New Mexico.
- Lockheed Martin, Boeing, Raytheon, Northrop Grumman, UTC Aerospace, Moog, SAIC, Ball, McNally/SunCountry, Aero Mechanical, Aero Parts and Applied Research Associates are among the other industry leaders with important operations here.
- Titan Aerospace, a start-up UAV company, recently relocated from California to Moriarty, 40 miles east of Albuquerque.

- The Albuquerque International Airport, known as The Sunport, recently closed its north-south runway, making available to potential users an 84-acre site adjacent to Kirtland Air Force Base with taxiway access to New Mexico's longest runway.

The Sunport is a driver of economic activity in the Albuquerque region and indeed in all of New Mexico. With 5.2 million passengers a year, the airport is a gateway of commerce for many industries.

"The Sunport offers companies the ability to locate on tax-exempt land. Impact fees are waived at either of the City's two airports — the Sunport and Double Eagle II, our general aviation airport," says Jim Hinde, director of aviation for the Sunport.

Location plays a big role. "We are three miles from the intersection of two major interstates," adds Hinde. "A rail spur comes into the south side of the airport, making intermodal a component of our logistics infrastructure."



The Eclipse Aerospace 550 jet is the most technologically advanced aircraft in its class. Eclipse will deliver its first 550 to a customer in the third quarter of this year.

Photo courtesy of Eclipse Aerospace

IT & Software

The Albuquerque metropolitan area ranks 34th among the largest U.S. metro areas in the percentage of jobs that are related to science, technology, engineering and math (STEM), the Brookings Institution reported last month, giving a huge boost to the local economy as STEM jobs pay almost twice as much as non-STEM jobs. A few of the smaller, emerging companies include:

- Lavu — this Point of Sale (POS) software developer takes full advantage of Apple's iPad and iPhone technologies and is often featured on Fox's popular Kitchen Nightmares TV show.
- Speridian, an award-winning CRM/Enterprise Solutions developer, is currently



Ultramain Systems, Inc. CEO Mark McCausland at the company's test lab displaying their latest software products, which have been integrated into tablets and smartphones to assist pilots and crew with managing logistics and maintenance information.

Photo courtesy of Ultramain Systems, Inc.

expanding their operations in Albuquerque as they grow their global presence with facilities in India.

- @Pay — the disruptive email payment developer is changing the way we buy online. @Pay’s technology allows consumers and retailers to close a sale with two clicks, whether on a computer or smartphone: one click to select their purchase and one click to confirm. CEO John Killoran has sourced funding from mostly New Mexico based investors as well as his talented staff. “Albuquerque is great for an intelligent work force, with one of the nation’s highest concentrations of PhDs, and whose children are our next generation of tech talent. Albuquerque has an incredible work force — super smart, motivated — they make excellent employees.”

Other industry clusters include semiconductors/electronics (Intel has a major fab in neighboring Rio Rancho), optics, cybersecurity, biomed/biotech and environmental technologies. There is also an excellent cluster of customer and technical support centers and shared services operations.

Houston, We Have a Partner

Glance at Emcore’s website (emcore.com) and you’ll be treated to images of the Mars Science Lab, the NASA Stereo Mission and AMOS Communications Satellites. One of the world’s leading pro-

viders of semiconductor components and subsystems for the fiber optic and solar industries, Emcore was recently awarded the solar panel manufacturing contract for NASA’s Green Propellant Infusion Mission. This announcement comes on the heels of a June 20th announcement that Emcore has been contracted to supply the Indian Space Research Organization (ISRO).

The \$22-million project is coup for Emcore, further establishing them as a major player in the Asian satellite market, and strengthening their position as a private-sector partner to help carry out NASA’s lofty goals and aspirations.

So unless you’re a tax collector, there’s never been a better time to do business in Albuquerque.

Emcore’s operations are adjacent to Sandia National Labs, as well as the Air Force Research Laboratory’s Space Vehicles Directorate and Directed Energy Directorate.

New Mexico, which is already home to Spaceport America, captured the world’s attention as a space exploration center last October when Austrian skydiver Felix Baumgartner ascended 24 miles into the stratosphere above Roswell in a helium balloon before free-falling in a pressurized suit and then parachuting to earth. Mil-

lions of viewers around the world watched his record-breaking 10-minute descent — the culmination of the Red Bull Stratos project — live on the Internet. Albuquerque-based precision measurement, sensing and controls company Applied Technology Associates played a key role in the record-breaking jump. Thirty-five ATA staff members were among the 100-person crew that provided flight support for the mission.

Powering Up

Companies making large investments in new plant and equipment need to do so in markets where the utility infrastructure is reliable and affordable. At less than 6 cents per kilowatt-hour, PNM’s industrial rates are among the lowest in the Southwest, according to the Energy Information Administration. PNM is New Mexico’s largest electric utility, and consistently ranked in the top-performing quartile by the Edison

Electric Institute in terms of the duration of outages and the frequency of outages experienced by the average customer.

PNM is focused on supporting economic development in New Mexico, recognizing the importance for the state and its customers. The company recently announced a \$250,000 grant to create and launch a new initiative to support local small businesses with critical resources they need to expand and create new jobs. In recent years, PNM has invested in new infrastructure to help make possible



Photo credit: MarbleStreetStudio.com

growth in metro Albuquerque, one of New Mexico's fastest-growing areas.

Entrepreneurs as Rock Stars

One of the best-known organizations for entrepreneurial assistance is Technology Ventures Corporation, a nonprofit formed by Lockheed Martin to help start-up companies commercialize technology coming out of Sandia National Laboratories. The initial goal was to increase the local economic impact of the labs' operations, but TVC also contributes to the community by introducing investors to those entrepreneurs who have well-screened projects that are ready for investment.

TVC actively recruits venture capital firms to locate in New Mexico and assists entrepreneurs with fundraising efforts.

"We don't fund anybody directly," said president and CEO John Freisinger. "We provide services to help them develop strategies. You have to have a world-class business strategy because no longer are you competing with just local entrepreneurs but some who may be in Singapore and London. So, the final project they have is a business plan that we can then introduce to the business community and get them to venture capitalists."

Since its creation in 1993, TVC has connected entrepreneurs with \$1.3 billion in venture capital. In fact, there are more venture investors in this state than in surrounding states, with the exception of Texas, according to Freisinger. And TVC's assistance is free.

If the company is in New Mexico, there

are state programs that allow an entrepreneur to get help from laboratory technicians free of charge as well.

"If you have a problem and you're a company in New Mexico, Sandia Labs can help solve that problem with scientific expertise," Freisinger said.

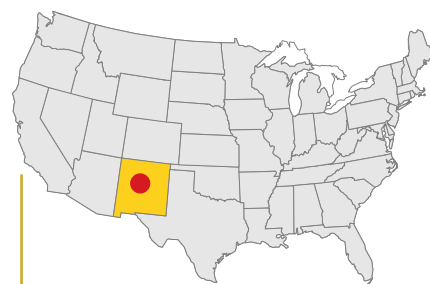
"Albuquerque treats its entrepreneurs like rock stars," he said.

Breaking Good

And then there's the booming entertainment industry. Albuquerque is rapidly becoming Hollywood's favorite second home. New Mexico is ranked in the top three states in the country for its film incentives. The recent expansion of the state's film tax rebate program now offers up to a 30-percent refund for qualifying productions.

With an established infrastructure including Albuquerque Studios and I-25 Studios, and the most qualified crew base outside of Los Angeles and New York, Albuquerque attracts the lion's share of the filming in New Mexico. It is the transportation hub for the state, with 310 days of sunshine and close proximity to Los Angeles. Couple all of this with location looks that can double for just about any place on the planet and you have a world-class filming destination.

Albuquerque prides itself on being a film friendly city and has consistently been ranked by Movie Maker Magazine as a top city to film in. Emmy-winning TV series "Breaking Bad" and Hollywood blockbusters such as 2012's "The Avengers" were filmed here, as well as the highly anti-



Albuquerque Metro Area Fact Box

Population (2012):	903,346
Households (2012):	353,143
Average Household Size:	2.5
Percent Urban Population:	89.4
Median Age:	37.1
Housing Units:	381,607
Median Home Value:	\$192,009
Total Household Income:	\$25.16 billion
Median Household Income:	\$54,199
Per Capita Income:	\$27,852
High Income Average:	\$330,571
Percent of Adults with College Degree:	29.6
Total Labor Force:	409,343
Percent White Collar:	63.3
Percent Blue Collar:	17.1
Annual Average Temperature:	56.2 F
Average Annual Snowfall:	11 inches
EASI Quality of Life Index:	140

Source: *DevelopmentAlliance.com/Conway Data*



pated film "The Lone Ranger." The direct spend in the greater Albuquerque area for FY2013 was \$93.5 million.

Ann Lerner and her team at the Albuquerque Film Office offer FREE, comprehensive assistance to filmmakers, acting as a liaison with city agencies and assisting in securing locations, equipment, and accommodations.

Albuquerque also has an evolving visual effects and post-production sector.

Albuquerque is home to Central New Mexico Community College and the University of New Mexico, the flagship university in the state. Both are enormous players in partnering with, and providing students to, expanding companies. Economic development is part of their respective missions, and their students and area employers are the beneficiaries. Other

universities throughout the state have high concentrations of students who are from the Albuquerque metro, and they look here first for employment opportunities.

Great Talent, Low Costs

The availability of a skilled work force and low overall operating costs are among the metro area's strengths that companies cite as influential to their decisions to select Albuquerque.

Fidelity Investments is one of those companies, and it gathered community leaders and its 500 employees to celebrate its fifth anniversary in Albuquerque in May.

Lowe's selected Albuquerque for its first U.S. corporate office outside of North Carolina, opening the doors to its 65,000-sq.-ft. center with 150 employees

in March of 2012. They had such success finding talent that they leased an adjacent 30,000-sq.-ft. office, and total employment will reach 750 persons this summer, providing internet sales, customer support and repair services.

Gap Inc. came to Albuquerque 10 years ago with a Shared Services Center providing support to finance operations at its headquarters. The first year savings on real estate and labor were announced to be \$8 million, and the world-class retailer employs about 350 professionals in its downtown Albuquerque offices.

There are hundreds of other examples like these, and there will be hundreds more to be created as New Mexico and the Albuquerque metro area are discovered by decision makers who are looking for a great place to grow their businesses. ▼

This Investment Profile was prepared under the auspices of



Albuquerque Economic Development

Gary Tonjes, President
505-246-6200
www.abq.org



Albuquerque International Sunport

Jim Hinde, Director of Aviation
Jack Scherer, Associate Director of Planning and Development
505-244-7725
www.cabq.gov/airport



Bernalillo County Economic Development Department

Mayling Armijo, Director
505-468-7185
www.bernco.gov/economic-development



City of Albuquerque Economic Development Department

John Garcia, Director
505-768-3270
www.cabq.gov/economicdevelopment



Public Service Company of New Mexico (PNM)

Carol Radosevich, Director,
Economic Development and
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505-241-4548
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A Very Busy Two-Way Street

Let's focus on what works in our relationship with Mexico.



Santa Elena Canyon, Rio Grande River.

Photo by Daniel Schwen

President Obama's visit to Mexico City in May had an interesting and surprisingly novel focus on the two nations' very positive economic relations, now at an amazing \$536 billion dollars in two-way goods and services trade for 2012.

This represents a quintupling of bilateral trade since 1993, the year the North American Free Trade Agreement was signed by President George H.W. Bush. President Obama's extensive references to this enormous economic relationship essentially confirmed what we have known for years: The U.S.-Mexico relationship is essentially a *commercial* relationship, rather than a security-based relationship. And that is — and will continue to be — good news for all of us.

Depending on whether or not you have worked in Mexico previously, you may be somewhat confused, because after Mexico's security challenges over the last several years, many are surprised that the country has not fallen into the Pacific Ocean. And don't get us wrong: Mexico's

security situation is truly challenging (although we would emphasize that this is not at all reflected in U.S. border communities' small and continually falling crime levels). But at a policy level, at least, we seem to finally realize and agree (and really, what took us so long?) that the two nations comprise an absolutely critical component of each other's economies.

by **ERIK LEE**
editor@siteselection.com

We would be wise to double down on our unique brand of free trade with Mexico and the opportunities it presents to us.

In our recent report done in collaboration with the New Policy Institute, "Realizing the Strategic National Value of our Trade, Tourism and Ports of Entry with Mexico," we explore what all of this means, and how we can benefit even more from this amazing and surprising economic bonanza that we have. It is quite doable, but it will take a shift in attitude and approach, a bit of investment and some creative thinking on how to most efficiently and safely move people, goods and services between our two countries through our numerous, highly congested land ports of entry.

Any Way You Slice It

To shift our approach, we first need to clearly define what works and what doesn't work in our relationship. Measured in any number of ways, trade with Mexico definitely works.

Mexico is our nation's number two export market in the world and our number three trading partner overall (imports and exports). As mentioned above, bilateral trade is estimated to have reached \$536 billion in 2012, surpassing even 2011's \$500-billion record amount of trade. In addition, Mexico is our nation's second most important foreign tourism market as well as the fourth-ranked in terms of spending by tourists.

Six million U.S. jobs depend on our trade with Mexico. Twenty-three states have Mexico as their number one or number two trading partner, and over 70 percent of NAFTA trade flows through our ports of entry, along with millions of Mexican visitors who have a major economic impact on the United States.

As eye-opening as these statistics are, unfortunately these are facts that are hidden in plain sight for too many Americans, citizens and policymakers alike. This is primarily due to the immensely divisive politics over NAFTA and free trade in general and the emphasis on border secu-

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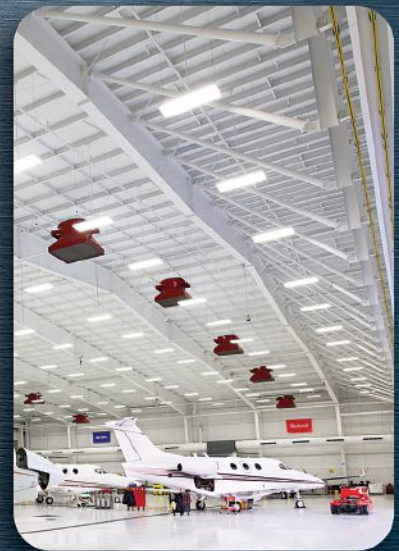
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ity more recently. Recognizing this, the Obama Administration has implemented a number of policies intended to better secure the border and to improve inter-agency coordination on binational issues as well as expand trade via the proposed Trans Pacific Partnership, whose negotiations now include Mexico and Canada.

If you continue to scratch the surface just a bit on this issue you find that fairly broad bipartisan agreement has developed in Congress on the need to improve our land ports of entry with Mexico, which are responsible for screening and facilitating legitimate trade and travel.

Sen. John Cornyn (R-Texas) is sponsoring a bill in the Senate that enables public-private partnerships at the ports of entry; in the House, Rep. Henry Cuellar (D-Texas) is sponsoring an identical bill. And the Border Security, Economic Opportunity, and Immigration Modernization Act of 2013 from the bipartisan "Gang of Eight" proposes the addition of 3,500 additional Customs and Border Protection officers to staff the ports of entry on the southern border. This additional staffing

has the potential to be enormously helpful in relieving commercial, passenger and pedestrian congestion at our ports of entry with Mexico.

What does all of this mean for your business? First of all, the policy momentum seems to be pointing in the right direction to recognize the importance of cross-border business and to make it an easier process overall.

Twenty-three states have Mexico as their number one or number two trading partner.

To take this to a more personal level, the *qualitative* aspects of your firm's approach to Mexico are at least as important as developing a good business model. Business in a global context is still driven by personal interactions, and Mexico is perhaps the quintessential example of this.

The dominance of large family-owned *grupos* is a key characteristic of Mexican business culture, and frankly it takes time for Mexican networks to develop a comfort level with who you are and what you are

trying to accomplish.

Don't expect an idea to materialize after your first trip to Mexico and a follow-up email, but do make a point of meeting with the experts at ProMéxico, a division of the Ministry of Economics that promotes investment in Mexico and Mexican business abroad.

In this era of globalization and economic statecraft, money really talks, and the reality is that our bilateral commercial "conversation" makes the talk about Mexico's security situation and our own worries over border security look small in comparison.

Refocusing on this reality and positive opportunity will be necessary in order for businesses to take full advantage of NAFTA's strategic national value as well as that of the next generation of trade agreements, which hold some of the keys to our nation's competitiveness and our economic destiny. ▼

Erik Lee is the executive director of the North American Research Partnership, a new think tank that looks at North American trade, sustainability and security.

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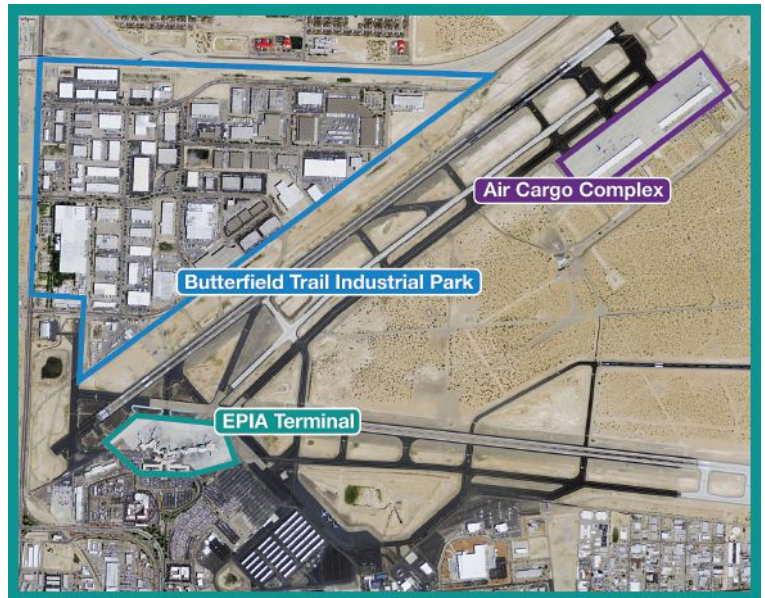
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Butterfield Trail Industrial Park

Butterfield Trail Industrial Park encompasses 588 acres of prime land located on El Paso International Airport property, as an added plus it is within Foreign Trade Zone No. 68. The Park has industrial, office, and warehouse space, with easy access to air, rail, highway transportation and the Mexico Border.

In an effort to revitalize Butterfield Trail Industrial Park and generate economic development, El Paso International Airport has undertaken a \$14 million project to improve the streets and beautify the streetscape in the industrial park. The beautification of the streetscape includes expansion and enhancement of the landscaping in the area as well as the addition of pedestrian amenities such as walking trails and ADA ramps. The construction will be completed by the end of the year.

For business opportunities at Butterfield Trail Industrial Park please contact: Ceci Avevedo-Pilz, Land & Contract Administrator, El Paso International Airport, Phone – 915.780.4733, Email – acevedopilz@elpasotexas.gov



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More pellets, please!

EU subsidies for biomass will generate more investments in the US wood industry and intensify the search for favorable wood pellet plant sites.

Thinking about renewable energy, the first things that come to mind are usually large fields of solar panels facing the sun, wind farms with revolving blades or turbines behind dams producing hydropower. But another source of renewable-energy already accounts for about half of Europe's renewable-energy consumption — biomass.

Wood pellets belong to the biomass group of renewable-energies and are gaining in importance to fulfill the European Commission's renewable-energy targets. They are also leading to a number of sizeable investments in traditional US wood industry locations. Understanding these developments requires looking back at decisions taken by the European Commission (EC) in the year 2007. Back then, the European Commission decided to reduce Europe's greenhouse-gas emissions by 2020 to 20 percent below their 1990 level and to set a goal of moving Europe to 20 percent renewable energy by 2020. This decision initiated the boom of renewable-energies in Europe.

Wood pellets have only become an important part of this boom in the past few years. Owners of large coal-fired power stations in Europe started searching for a way to fulfill the new EC regulations and to find a solution for the declining economic relevance of traditional coal-fired power stations due to their high carbon dioxide emissions. The answer was to give the old dirty giants a green coat of paint by "co-firing" regular coal power plants with wood pellets. Wood pellets have similar burning qualities to traditional coal and the costs of converting boilers to burn wood pellets are low. The idea of declaring wood pellets as a carbon neutral energy source was based on the assumption that the released emissions of carbon dioxide during the burning process are neutralized by the carbon that is captured and stored in newly growing trees. The idea of using

by **MARKUS van TILBURG**
editor@siteselection.com

wood as a renewable source was backed by environment organizations as well as by the EC itself. The EC soon realized that it was not possible to meet the goal of producing 20 percent of energy from renewable sources only through solar and wind power. Thus wood pellets were welcomed by all parties, and especially by owners of coal-fired power stations that only needed to make marginal investment to adapt their power stations to the new feedstock. Furthermore these energy firms can now benefit from tremendous pay offs through government subsidies by produc-

“Analysts expect wood pellet consumption to grow to as much as 29 million metric tons by the year 2020.”

ing renewable-energy and feeding it into the European power grids.

Starting in 2009, this development turned wood pellets in Europe into a growing business and led to a real boom that began in 2011. At that time, companies like the large German energy firm RWE or the British utility Drax as well as other European players opened the first "pure" wood pellet fired power stations and started to co-fire coal power stations with wood pellets at several of their sites around Europe. The European statistical bureau (Eurostat) reported wood pellet consumption in Europe at 9 million metric tons in 2009. This number grew to 11.4 million metric tons in 2010 and went up to 13 million metric tons in 2012. But this is by no means the end of Europe's craving for wood pellets, as analysts from the consult-

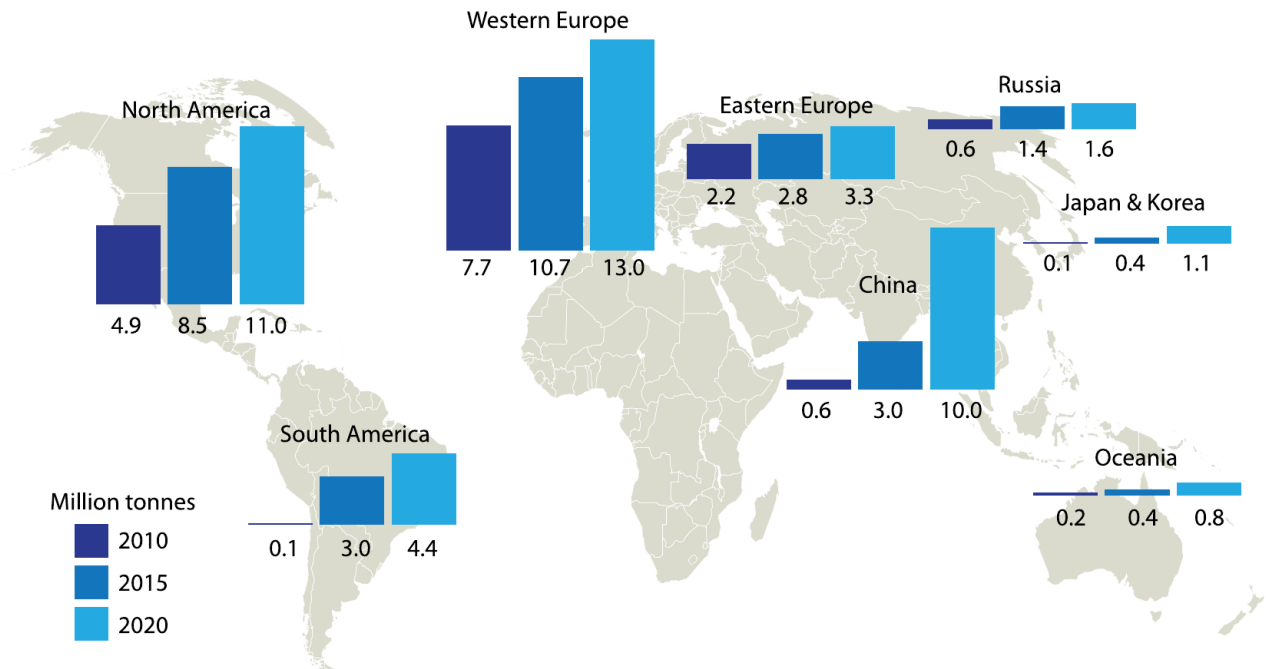
ing firm Bain expect wood pellet consumption to grow to as much as 29 million metric tons by the year 2020. This steep rise in wood consumption cannot be satisfied by European wood pellet production, which is running out of resources, with a current production of around 9 million metric tons of wood pellets per year. As wood supplies in Europe become scarce and more expensive, European pellet producers have begun to look elsewhere for adequate sources of raw materials. And this is where the US enters the picture.

The Impact on US Locations

The growing demand for wood pellets and limited European wood supplies has made investments in new markets necessary in order to build up safe and steady wood pellet supply chains for European energy producers. Since this sector is relatively new, it was not possible to rely on established specialists and the energy firms began building the entire wood pellet supply chain themselves — securing wood resources as well as producing wood pellets in the US and finally shipping them over to Europe. Germany's RWE was one of the first companies to open a US based wood pellet production facility in Georgia in 2011. RWE Innogy Inc. founded a new subsidiary, called Georgia Biomass L.L.C, and produces 750,000 metric tons of wood pellets per year, which it ships out through the port of Savannah to Europe. Another example is the British company Drax, which built a \$120-million and 450,000-metric-ton production facility in Louisiana with access to the Port of Greater Baton Rouge.

More recent pellet investment projects as well as facilities currently under construction show that the production of wood pellets is being outsourced by the energy firms to companies specialized in wood pellet production, many of which are US-based companies. These firms

GLOBAL PELLET PRODUCTION: 2010, 2015 and 2020 Outlook



are 100-percent focused on sourcing the raw material, operating the wood pellet production plant and handling the logistics for transporting the renewable resource from the US to Europe. Examples of these companies include:

- The Atlanta-headquartered Enova Energy Group is developing three wood pellet projects in Georgia and South Carolina, each with a capacity of 450,000 metric tons per year for exports to Europe through the Port of Savannah.
- Fram Renewable Fuels invested \$91 million in Georgia to produce 500,000 metric tons of wood pellets for European export and is reportedly planning a second facility.
- German Pellets is building two US pellet plants, one in Woodville, Texas, with a production capacity of 500,000 metric tons and one in Urania, La., with an expected production capacity of 1 million metric tons per year. The entire output will be exported to Europe.

Based on recent projects, a typical pellet production facility with an output of 500,000 metric tons per year will create around 250-300 jobs during the construction period and 50-80 direct permanent jobs once the facility is operational. The increase in projects is also contributing to a revival of the wood industry in traditional wood locations, many of which have suffered for a long time due to the decline of the US wood industry.

There appears to be potential for addi-

tional wood pellet investments as the pellet boom has not reached its peak. An analysis by Bain & Company compares the output in metric tons of established and planned wood pellet production facilities in the US with the forecasted European market demand (see graphic). This comparison shows that much of the new demand is expected to come from the UK, where the government has started subsidizing companies for co-firing coal power plants with biomass.

What are Investors Looking For?

Wood pellet companies are usually looking for similar location criteria in their site selection process, which can be summarized as follows:

- Most importantly, wood pellet producers are looking for locations surrounded by large wood supplies and ideally soft wood supplies.
- The required minimum size of a wood pellet production site is usually much larger than the pure footprint for the production facility. Companies need a lot of space to store wood to keep the mill running. Furthermore, companies also stockpile a certain amount of wood in order to hedge against temporary variations in wood price and availability.
- Wood pellets cannot be stored for too long as this affects their burning quality. This characteristic of wood pellets makes an effective logistics system crucial. Wood pellet producers are not

just looking for locations with a large wood supply in their proximity but also for a site that is easily accessible by truck and ideally has rail connections to an Atlantic Coast seaport for exports to Europe. An easy logistical connection to a seaport or even better a deep seaport with direct connections to European ports is crucial for the investment. Pellet producers or their logistics companies may also invest in port infrastructure to build their own silos for the storage and loading of pellets.

- Last but not least, the strong competition for wood resources means that companies prefer locations without competitors in the vicinity.

There are risks that an environmental backlash in Europe may cause some countries to revisit the subsidies provided to pellets as a form of renewable energy or that US environmental groups may oppose the use of US forest resources for exports. The recovering housing market in the US will also create competition for wood that could affect prices. For the time being, however, the combination of growing European demand for pellets and ample US forest stocks should continue to generate new investments in US pellet producing facilities. ▼

Markus van Tilburg (mt@terrain-global.com) is manager, foreign direct investment, at Berlin-based Terrain Consulting, a division of Conway Data, Inc.

The Right Chemistry

Saxony-Anhalt provides the mix for firms in the chemical-plastics sector.



The industrial cradle of Central Germany provides the lifeblood of manufacturing — the critical ingredients of chemistry and plastics — that keeps factories around the world humming.

From cars and yogurt cups to clean water and solar modules, the building blocks of petro-chemical products required in their manufacturing process increasingly originate from the German Chemical Triangle that includes Saxony-Anhalt.

In 2012, chemical companies accounted for 8 billion euros in total sales volume in Saxony-Anhalt, up about 2 percent from 2011. Since the early 1990s, investments of 17 billion euros have been made into

physical plants and infrastructure in the chemical manufacturing sector of the state in the eastern part of Germany.

About 30,000 chemical manufacturing jobs have been created over the past two decades in the German Chemical Triangle, which stretches from Saxony-Anhalt and Brandenburg to Saxony. From 1991 to 2011, 404 corporate facility projects in the chemicals sector have opened in Saxony-Anhalt alone.

In fact, the concept of the “chemical park” was both created and realized for

by **RON STARNER**

ron.starner@siteselection.com

the first time in the world in Saxony-Anhalt. “Our state has provided the impetus for the further development of the chemical industry throughout the world,” said Reiner Haseloff, prime minister of Saxony-Anhalt.

He is not overstating the case. Two of the three largest chemical parks in all of Germany are Leuna and Bitterfeld, both in Saxony-Anhalt.

A third — Zeitz Chemical and Industrial Park — is an emerging leader in this sector. Located about 40 kilometers southwest of Leipzig, Zeitz ranks 17th in total size (232 hectares) out of the 60 chemical parks in Germany. Zeitz is also known as the “Green Chemistry Site.”

Zeitz was originally established in 1937 as Carbon-Hydrification Works of Zeitz. To date, about 350 million euros of industrial plant investment have been built on site; and today the combined revenues of the companies operating in the park is about 300 million euros per year.

The 50 companies in Zeitz include 15 manufacturers who employ a combined total of 600 workers.

“The largest chemical parks in Germany have more than 1,000 hectares, but our smaller size allows us to accommodate small to mid-sized companies and family-owned operations,” says Arvid Friebe, divisional director of location development and finances for Zeitz. “Our tenants tend to be international in origin and scope. Puralube Holding GmbH is an oil recycling company from the USA.

Puralube is investing 50 million euros to establish a third oil refinery plant in the Zeitz Chemical and Industrial Park in Saxony-Anhalt.

Photo courtesy of Puralube Holding GmbH



Radici Chimica Deutschland GmbH is an Italian manufacturer of acidic material used to produce nylon. Interstarch GmbH is a Ukrainian firm that produces modified or industrial starch from wheat for the chemical and paper industries. We have some smaller operations based here too.”

The Ingredients for Growth

Two Zeitz tenants that are expanding rapidly are Puralube and DEUREX AG. “Puralube is in the process of setting up a third oil refinery in Zeitz,” says Friebe. “They received their environmental permit at the end of April, and all of the financial arrangements have been made by their holding company in Wayne, Pa. They are planning to invest 50 million euros, create 50 new jobs, and increase their total production capacity from 180,000 metric tons to 270,000 metric tons.”

The company takes used engine oil, recycles and refines it, and converts it for re-use as long-lasting engine oil again.

Andreas Schueppel, CEO and managing director of Puralube in Germany, tells Site Selection that his company opened its first German refinery in 2004 and now operates two refinery units in Zeitz.

“We decided to invest in our third refinery here,” he notes. “With this investment, we are expanding our capacity by 50 percent. In order to realize synergies as much as possible, we will build the third plant on the same site. Over the last five years, we have increased our revenues by 63 percent.”

Schueppel says that Saxony-Anhalt “has a long history with the chemical industry. About 80 years ago, engineers developed a process to liquefy lignite to produce gasoline in Leuna, about 30 kilometers away from Zeitz. In the former GDR, the chemical industry had about 50,000 employees in the southern part of Saxony-Anhalt. After the fall of the Berlin Wall, the chemical industry in this area collapsed and most of the workers became unemployed. But that industry has gradually come back very strong, and the people of this region welcome chemical companies like ours to the area.”

He adds that Puralube has benefitted from government subsidies that help start-ups and expanding firms increase their physical plant space and hire new workers in Saxony-Anhalt. “We decided to install



Photo courtesy of DEUREX AG

DEUREX AG opened its new plant in Zeitz in April. The industrial wax producer has been based in Saxony-Anhalt since 1999.

our first refinery here in order to reduce our own risk,” says Schueppel. “Because we found the perfect infrastructure here at this site, we were able to save capital during the investment phase. This allowed us to focus on our core business. We also have a lot of utility supplier support around us — including hydrogen, steam, natural gas, wastewater disposal, etc. Because of our success here in Saxony-Anhalt, the company is now actively planning to realize its first refinery project in the U.S.”

Torsten Rodiger, media relations officer

made of petroleum, Saxony-Anhalt is the perfect location for a chemical company such as DEUREX.”

Doorway to All of Europe

The central location in Europe is a key factor, says Rodiger. “Saxony-Anhalt is located in the heart of Europe,” he adds. “The major portion of our partners and customers is situated in Europe, and we can reach and supply them in very short term. The industrial park here is near the Leipzig-Halle Airport, which is developing as a European air hub. The park has a very

good connection to national and European motorways. A lot of forwarding agencies are established here, and they help us deliver our products within very short periods of time.”

Zeitz’s Friebe says tenants are impressed with the re-

sourcefulness of the people of Saxony-Anhalt. “After the fall of the Berlin Wall, we had to start from scratch again in Zeitz,” he says. “We did that by an invention borne of necessity — the concept of the chemical park. We added infrastructure and utility services.” ▼

“Because we found the perfect infrastructure here at this site, we were able to save capital during the investment phase.”

— Andreas Schueppel, CEO and managing director, Puralube in Germany

for DEUREX AG, says the international supplier of industrial waxes is expanding in the Elsteraue industrial park in the Zeitz Chemical and Industrial Park.

“DEUREX was established in 1989, and since 1999 we have been located in Saxony-Anhalt,” he says. “Our new plant opened here in April and has an output capacity of about 800 metric tons per year of our industrial waxes and oil absorbents.”

DEUREX is still a small company, but it is growing swiftly. “Since 1989, we have had a growth rate between 10 and 25 percent every year,” says Rodiger. “Traditionally, Saxony-Anhalt has always been very strong in the chemical industry sector starting with open-pit mining and the petroleum refining industry. Many highly qualified workers and chemists have been trained and settled here. Since our products — industrial waxes — are originally

This investment profile was prepared under the auspices of IMG, the Investment and Marketing Corporation of Saxony-Anhalt. For more information, contact: Kristin Gabor, regional manager for North America of IMG at +49 (0) 391 568 99 22 or by email at kristin.gabor@img-sachsen-anhalt.de. On the Web, go to www.invest-in-saxony-anhalt.com.



Tenth Anniversary of The WORLD FORUM for Foreign Direct Investment 2013 11th–13th November, Shanghai, China

Red Hot Locations is delighted to announce that the 2013 World Forum for Foreign Direct Investment (FDI) will be held in the dynamic city of Shanghai, China.

From November 11th to 13th, political figures from locations that have successfully netted important FDI projects will converge on Shanghai to share the stage with corporate leaders from some of the multinational corporations that have chosen

to operate in their jurisdictions. These high-level panel discussions and debates make The WORLD FORUM for Foreign Direct Investment an indispensable fixture on the annual FDI calendar. More than 300 industry leaders will come together for an open, direct and provocative debate on the global investment landscape.

THE NEXT INDUSTRIAL REVOLUTION

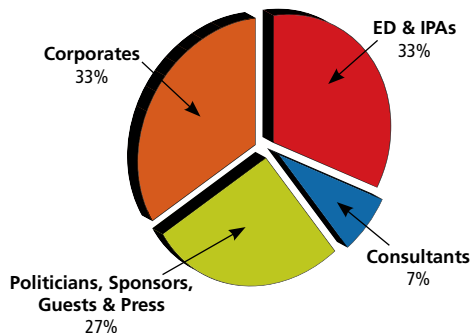
As the World Forum celebrates its Tenth Anniversary we dissect the future of corporate expansion, and explore how new technologies and processes will affect every aspect of our lives.

- Will 3D Printing usher in a new era of manufacturing?
- Is Clean-Tech really Sustainable?
- What industries will lead the world's economic recovery, and which regions are best poised to take advantage?

As we go to press, there is every indication that Eastern Europe, Asia and Latin America will dominate the political stage during the WORLD FORUM's Leadership Summit, indicating a move away from the traditional beneficiaries of FDI.

**The WORLD FORUM
for Foreign Direct Investment 2013**
will host 300+ delegates from around the world.

(chart shows average breakdown of attendees)





PIVOTING from ASIA?

China is no longer the undisputed king of manufacturing, with rising labour costs dictating a pivot away from traditional manufacturing facilities to more innovative R&D projects, regional offices and shared services, often requiring highly skilled staff and advanced technological infrastructure.

We'll be asking the question "What is Cleantech anyway?"

Everyone claims their investment is green but aren't we sometimes confusing the product with the process? The Sustainable Investment panel will pitch speakers from renewable energy, tire manufacture and coffee production into the ring and the audience will judge which if any can truly claim to have a minimal impact upon the environment.

Since China has just approved measures for tackling emissions including refusal to authorise industrial projects that do not meet required standards, this session looks set to raise as many questions as it answers.



TENTH ANNIVERSARY EXCLUSIVES

The WORLD FORUM for Foreign Direct Investment celebrates its Tenth Anniversary with the launch of two exclusive resources:



The first is a report on the FDI competitiveness of cities around the world, published by Conway Data in co-operation with IBM. This is the first report to analyse and rank 100 cities on their potential for attracting different types of FDI projects, using the criteria applied by corporate decision-makers.

The second is the global FDI Association, a unique grouping of professionals involved in the business of FDI, to be launched during the meeting in Shanghai. This association is designed for and led by corporate investors to further their pursuit of the ideal environment for their projects. It will act as their collective voice before governments throughout the world and will be a force for overcoming cultural misunderstandings, reducing political risk and forming longstanding partnerships with local business communities. All who attend this year's WORLD FORUM for Foreign Direct Investment will be granted their **first year's membership free of charge**.

There will be an undeniably Asian flavour to proceedings as so many multinationals have such a significant presence in the region, but The WORLD FORUM for Foreign Direct Investment 2013 remains true to its global origins and every industrialized continent will be represented.

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As East As It Gets



Newfoundland and Labrador leads the way in a region capitalizing on energy, resources and growing attention from overseas investors.

Early June saw the release of the 2013 Major Projects Inventory by the Moncton, N.B.-based Atlantic Provinces Economic Council. A major project is defined as any capital project, including public-sector, valued at \$25 million or more (\$10 million or more in Prince Edward Island). The 2012 MPI identified 357 major investment projects across Atlantic Canada with a value of \$100 billion. This year those numbers totaled 388 projects valued at a record \$115 billion.

The following excerpts highlight findings from the complete report, which can be ordered via the APEC website at www.apec-econ.ca.

The rise in major project investment potential is largely due to the increase in the estimated costs of several projects in Newfoundland and Labrador along with a new LNG export plant proposed for Nova Scotia. Energy-related investments account for an estimated \$6.6 billion or 44 percent of 2013 major project spending in Atlantic Canada. That figure is up 25 percent over last year and is expected to rise again in 2014 to over \$7.5

billion as the \$14-billion Hebron offshore oil project and the \$7.7-billion Muskrat Falls hydropower project, both in Newfoundland and Labrador, increase activity.

Newfoundland and Labrador continues to dominate activity in the region. APEC has identified 113 projects in the province totaling \$54 billion, a 12-percent increase over last year's inventory. They include the final year of construction now under way for Vale's \$4.25-billion Long Harbour nickel processing facility. Among the highlights in other provinces:

Nova Scotia

APEC has identified 156 projects totaling \$40 billion, up 23 percent over last year. The increase is largely due to a proposed \$5-billion LNG export facility by Pieridae Energy in Goldboro.

Growth was boosted by increased electricity project spending, Halifax Shipyard upgrades and Shell's offshore work.

New Brunswick

APEC has identified 75 projects totaling \$18.9 billion, up 6 percent this year. The increase is due to a proposed oil pipeline, a rise in a potash project's value and new potential energy projects. A large highway project between Saint John and the US border was completed in 2012.

Prince Edward Island

The value of current-year major project spending in 2013 is up 10 percent to \$287 million. The rise in current-year spending is due to a \$60-million wind farm project planned by PEI Energy Corp.

Between 2006 and 2011 Atlantic cities have seen robust population growth, particularly in St. John's, N.L. (+9 percent); Halifax, N.S. (+5 percent); Moncton, N.B. (+10 percent); and Charlottetown, P.E.I. (+9 percent). The population growth has mirrored increased major project investment in those cities.

But continuing investment in the oil-sands of Alberta continues to draw skilled energy labor.

"In 2012 there was a net outflow of over 9,000 people from Atlantic Canada to Alberta," said the APEC report. "The interviews with project proponents for this MPI revealed that major project developers and suppliers are facing a rapid escalation in labor costs, particularly in Newfoundland and Labrador. The scarcity of labor has resulted in average wage growth in Newfoundland and Labrador of 5.4 percent in 2012, double the national average and the fastest rate of growth across the country for the second straight year. Ongoing labor issues remain a major challenge to be addressed in order for Atlantic Canada to fully capitalize on its major project potential."

Nevertheless, on June 12 the Conference Board of Canada projected that Newfoundland and Labrador will lead the country in economic growth over the next two years.

The Conference Board projects that the province's economy will grow by an estimated six percent in 2013 [ahead of the national average of 1.8 percent], and by 3.4 percent in 2014. ▼

Cape Breton Highlands National Park, pictured above, is known for its spectacular ocean scenery. According to the Canadian Tourism Commission 2012 Annual Report, tourism accounts for 608,500 jobs nationwide, and in 2012 generated more than \$82 billion in revenue. Photo courtesy of Province of Nova Scotia

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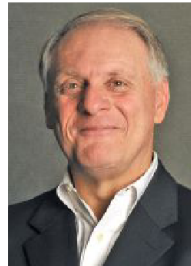
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Take Me Out To the Ball Game



As we move into summer, I am often reminded of the experiences from my childhood — the smell of freshly cut grass, children riding bikes through the neighborhood and the splash of the pool on a hot summer day. I am also reminded of one our nation's greatest pastimes, baseball — the crack of bats, freshly roasted peanuts and bleacher seats that were easy to come by. That's probably because they are so uncomfortable, but they were the best seats in the house.

Today it is no different. Baseball and other sports provide our towns something to experience. Whether it is a minor league team or a major league team, sports — and the industry derived from them — can have a significant impact on the quality of life of a community. And few know this better than our economic development members in IAMC. In this letter, I would like to recognize our economic development members and speak a bit to what they do.

According to economists at the Federal Reserve Bank of Kansas City, from 1994 to 2001 more than \$9 billion was spent constructing or renovating stadiums hosting major league sports teams, with public spending totaling \$5.4 billion. An additional \$3.7 billion in publicly funded dollars were dedicated to projects scheduled to open by the close of 2004. Arguably, economic development partnerships have created multiple additional retail and service jobs in addition to tax revenue from ticket sales and tourism dollars derived from having a local sports team. It is through the long vision of economic development authorities and individual investors that many great stories have developed.

Salt Lake City, Utah, host of our IAMC Fall 2013 Professional Forum, is one such story. As

host to the XIX Olympic Winter Games, Salt Lake City became the global epicenter for sport for 16 days. But it isn't just the story of the impact the Games had on Salt Lake City, with estimates of \$100 million in profits and 35,000 job-years of employment that resulted from the Games. It is also the increase in snow-skier visits, and the businesses that have relocated to the state following the Games. The story is also about the \$72-million endowment to maintain former Olympic sites such as the Olympic Oval, still in use today. (I understand we may see an Olympic venue during the Forum).

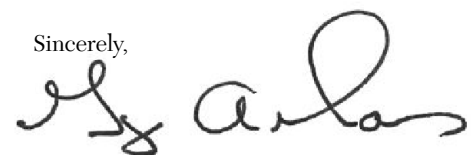
This long view of the future in real estate is what many of us — in economic development and otherwise — have to take. There needs to be a vision as to the end, and leaders to help the team achieve the project's goals, sometimes with years of work ahead. Rome wasn't built in a day, and neither was a baseball stadium.

This is why membership in IAMC is so critical. The partnerships and friendships one can create, the Forums in which we can exchange ideas and experiences, and the many other opportunities to network, allow all of us to be world-class practitioners capable of bringing more to our communities. Thank you to our economic development members for being a vital part of what IAMC is all about.

I encourage you this summer to take a child to a baseball game, buy some peanuts and watch your community rally around a pitcher and a hitter in the setting sun. There is really nothing better than to see how the many aspects of our business can have a real and lasting impact on a community.

Have a great summer.

Sincerely,



George Manos



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Salt Lake City Sights Made Simple

The Grand America Hotel, headquarters for the IAMC Fall 2013 Professional Forum on September 28 – October 2, is situated conveniently on the downtown circuit of UTA TRAX, Salt Lake City's streetcar system, which can deliver you to many local points of interest. Post-Olympic Salt Lake City is a place of surprises, full of history, art, culture, entertainment and recreation — all accessible by trolley.



Take a streetcar expedition through the city; check out historic sites including the Salt Lake Temple and Temple Square, the Tabernacle (home of the Mormon Tabernacle Choir) and others. Add a stop on the trolley line for your morning java fix. For this, locals recommend visiting the Artful Cup, known for delicious banana bread and handmade mugs. This coffee shop with a colorful personality is right next to Utah Artist Hands, an eclectic gallery full of local art.

Downtown Salt Lake City is renowned for its authentic international cuisine that is easy to keep within your budget and schedule via trolley. The Utah legislature has relaxed liquor laws, so come enjoy cocktails as the night air is filled with the sound of live jazz

at The Red Door on Saturday nights. Just across the street, the Capital Theatre, a local landmark since 1913, hosts movies and Broadway shows, and even has hosted Fox's television show, "So You Think You Can Dance."

Jump off the trolley at the Tabernacle Social Club, a piano and karaoke bar that is the perfect place to laugh along with friends as you attempt to sing the "oldies but

goodies." For anyone with a sweet tooth, The Melting Pot is barely a block away with cheese and chocolate fondue fountains.

The Grand America Hotel recommends getting off at the Caffé Molise stop for a wonderful Italian dinner on their outside patio under the Wasatch Mountains and the stars. In fact, you can get a firsthand look at the stars at the Clark Planetarium, which offers exhibits for all ages to enjoy.

Whether you're young or young at heart, riding the streetcar system during the IAMC Fall 2013 Professional Forum in Salt Lake City will allow you to access the exciting and mouthwatering places that "The Crossroads of the West" has to offer.

— Mandy Cash

Scaling Up

With IAMC's membership and new programs growth, you have to read more and pay close attention to stay up to date on what's going on. And there's a lot going on. To keep you informed, The International Advisory Committee (IAC) maintains a steady drumbeat of news and information about its work through the monthly IAMC Dispatch Newsletter and the IAMC Insider sections of the bimonthly Site Selection magazine.

The IAC is engaged in a process of learning how to take IAMC's existing, highly successful programs and format them for cultures in Asia, Europe and Latin America. At a planning meeting June 19 in Dallas (still upcoming as of this writing), we aimed to map out how we plan to do this over the next one to three years.

Up front, I should state clearly and emphatically that the IAC's assumption is current IAMC policies and guidelines will apply unless we have good reasons to recommend modifications for operations outside the U.S.

Early in the Dallas planning session, the committee planned to cover IAC's value propositions on behalf of the Active, Economic Developer and Service Provider members. We must understand what prospective overseas members want from IAMC and how we'll deliver this. And, conversely, we will not forget to cover how the overseas operations will benefit U.S. domestic members.

Once we understand why members will benefit from IAMC International, we'll tackle other important issues. These include membership policies; sponsorship rules; planning, budgets and finance; securing local champions; setting goals and defining key metrics; the impact of overseas members on domestic U.S. Profes-

sional Forums; attendance eligibility and ratios for IAC events; brand development and awareness; and IAC team roles, including those of the committee, subcommittees and staff.

Much of our planning can be based successfully on IAMC's U.S. experience and the IAC's reconnaissance over the past two years in Asia and Europe. However, perhaps as much as a quarter of IAMC's overseas operating guidelines will have to be learned over time as we try things and evaluate the results. For some elements of IAMC International, there can be no substitute for trial and error.

The IAMC brand found an open niche in the U.S. and grew continuously and rapidly over the 11 years of the organization's existence. We've tested selected markets in Asia and Europe for interest in membership, meetings and services roughly parallel to those offered in the U.S. The results have been promising.

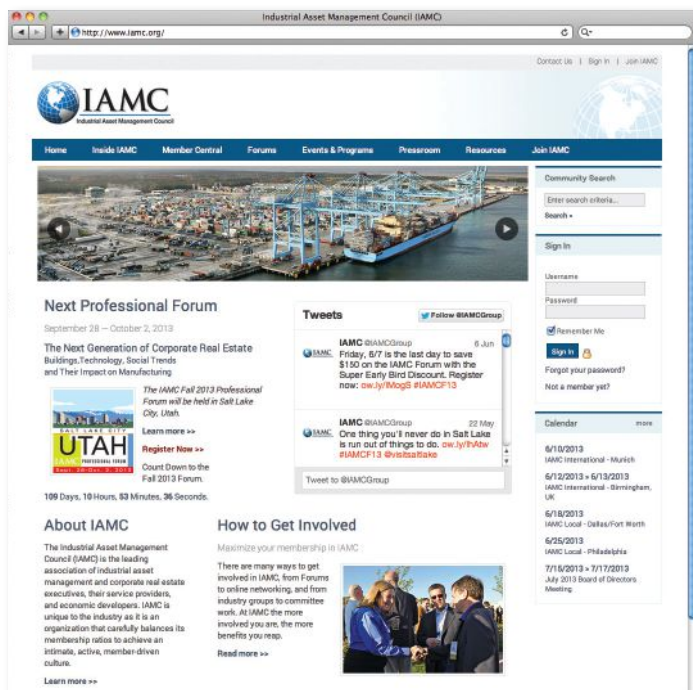
However, we know scaling up human organizations often entails difficult adjustments and decisions. I know this will be the case for IAMC International.



Still, I'm confident that with good communications, a highly involved leadership and supportive membership, IAMC will successfully take a step forward to international operations.

*Kevin Dollhopf,
Vice President, Worldwide Real Estate,
Hanesbrands Inc. and
Treasurer, IAMC Board of Directors*

The New IAMC.org



The website is the primary source of identity for most organizations. This is why IAMC recently upgraded its site to one that is colorful, graphics oriented, easy to use, intuitive, highly functional and very flexible. In fact, the same software used to manage membership lists, track committee activities and invoice membership dues is employed to create and service the website.

What's new in IAMC.org? The first thing you'll notice is the extensive use of graphics, color and photos. It has more eye appeal than the previous design. And this can be changed more easily than the former site.

Sweeping the cursor across the screen reveals another big change: in-depth drop-down menus. Gone are the two, three and four layers of screens required to drill down to your destination on the former site. Today, you can peruse the drop-downs, pick a menu item and you're rarely more than one screen away from your objective.

Also new is a strong self-service capability. Once logged in,

members can change their public profiles and update their photos when they want. Also, each staff member can create and edit sections they're responsible for without needing to know a special programming language.

The new website has many social media-like capabilities. Members can connect with other members and then share news, photos and information selectively with them.

Committee work is simplified and accelerated by new capabilities. Each committee can have Web space for a roster, contact information and member photos. Agendas, minutes and other key documents can be stored there for easy access by the committee. A brand new "blogs and forums" feature makes it easy for committee members to communicate in between conference calls.

IAMC's website is a quantum leap forward in aesthetics, function and productivity. If you haven't experienced it yet, give it a try and let us know what you think.

— Joel Parker

www.IAMC.org

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'Our Clients Prefer A Malaysia Location'

How multinationals' new and expanding **data centers** are helping transform Malaysia into a high-tech, knowledge-based economy.



by **MARK AREND**
mark.arend@siteselection.com

For well over a decade, Malaysia has championed the attraction of global IT companies and the cultivating of domestic high-tech enterprises through its MSC Malaysia ICT initiative, which is administered by the Multimedia Development Corporation (MDeC) Sdn Bhd. MDeC works to empower companies and communities with ICT services and resources and facilitates the country's goal of becoming a knowledge-based economy.

It provides skills training, R&D grants and funds for companies to use toward marketing their products and services overseas, among other services.

Malaysia offers customized incentive programs to businesses according to their facilities' primary function — internal IT, in the case of DHL, which operates one of two major global data hubs in the country. Incentives for data centers may include reduced land costs, flexible leasing arrangements and power and telecommunication cost incentives. Some regions within Malaysia offer local incentives, as well.

The Iskandar Regional Development Authority in southern Malaysia works to attract multinationals' operations in adjacent Singapore, for example.

"Almost all the data center service providers here are local companies — NTT Communications being the exception," says Wan Murdani Wan Mohamad, Director, Digital Enablement Division. "In 2011, we launched a program to upscale our data center players by focusing on the three Cs: capability, capacity and credibility. Regarding the latter, we provide funding for them to certify their data centers with internationally recognized certifications, for example, which increases their credibility on the international market.

"Regarding capability, we have a similar program where we provide funding for them to send personnel to training programs and to participate in professional certification courses," says Wan. "By increasing the credibility and capability of the data center industry, we believe the business will expand naturally, which will boost capacity."

That process is well under way: Malaysia has doubled its data center floor space from roughly 500,000 square feet to about 1 million square feet during the last three years. "Some of this is

natural business expansion activity, and some is increased business these companies are getting from overseas investment,” says Wan.

Land, Language & Labor Make A Compelling Case for Malaysia

Malaysia has additional advantages for data center operations, notes Lloyd Lee, vice president, sales, at AIMS Data Centre Sdn Bhd, which operates three data centers in Cyberjaya. The company maintains its primary data center in Kuala Lumpur. Other centers are in Johor Bahru and in other Southeast Asian markets.

“We are virtually free of natural disasters, and there is plenty of land compared to Singapore, for example,” he says. “We have a very multilingual population, and in terms of labor costs, we are very competitive in the region.”

AIMS is a wholesale, carrier-neutral data center provider with customers in the oil and gas industry and other key sectors.

“I travel around the region looking for data center space, and the space the government has developed here in Malaysia

Q: How does Malaysian Investment Development Authority assist in developing Malaysia's data center industry?

A: Under the new MIDA structure, there are eight new service divisions. The Information Technology and Communication Services Division has been established to undertake the promotion of ICT industry in line with MIDA's strategy to promote ICT the ecosystem.

MIDA is encouraging existing MNCs in Malaysia to leverage their eminent existence in this country to make Malaysia their regional hub for Global Sourcing, Shared Services and Data Centers. Multinationals such as Dell and Intel have multiple operations in Malaysia from manufacturing to shared services and procurement. The growth in this industry will accelerate investment in facilities management and mechanical and electrical sectors, such as uninterruptible power supplies (UPS), cooling equipment and DC infrastructure management (DCIM) systems. As the first point of contact for foreign companies coming into Malaysia, MIDA welcomes ICT projects, namely Data Centres, Shared Services, software development, digital content and cloud services.



AIMS Data Centre Sdn Bhd operates four data centers in Malaysia, including the CJ1 Centre (MyTeleHaus) in Cyberjaya shown here. Others are in Kuala Lumpur, Penang and Johor Bahru.

is very data center friendly,” says Adrian Yong, CEO of CSF Group plc, which recently completed a fifth data center, CX5, adding 201,000 sq. ft. of data center capacity to its 530,000-sq.-ft. portfolio. “The infrastructure is there, it is away from traffic congestion, which makes it easier for people to come here. Electricity and energy costs here are the lowest in Southeast Asia. We are making headway now in lowering connectivity costs, and that gives us a good competitive edge.”

Yong is referring to direct connectivity to points abroad that, like international air connectivity, is not yet as robust as that available in Singapore. “In 2014, we will have additional cable connectivity, which will help improve that.”

Yong and his peers in the booming data center business see plenty of demand ahead. As Yong reports in CSF's most recent annual report: “Enterprises in Malaysia have recently begun embracing the ‘software-as-a-service’ delivery model. Their interest is primarily driven by the lower total cost of ownership in the services model, the conversion of capital expenditure to predictable operating expenditure and the ability to scale up or down depending on business needs. Based on this trend and the Malaysian Government's continuing support of the data centre industry, the Malaysian data centre services market is expected to grow at around 16 percent per annum over the next five years with cloud computing to be an important driver of growth as Malaysian enterprises demonstrate increasing interest in cloud services.”

Data center space wholesaler MyTeleHaus Sdn Bhd Executive Director Yew

Kim Keong says regional economic hubs Singapore and Hong Kong should expect Malaysia to win more data center business in the near future. “We in Malaysia and at MyTeleHaus specifically can provide much more cost-effective space without sacrificing quality.” MyTeleHaus has four data center facilities in Malaysia — two (one in the planning stage) in Cyberjaya and one each in Johor and Petaling Jaya. The company specializes in space for managed services providers.

A Cyberjaya Data Center Supports DHL Divisions Globally

DHL has operated a data center in Cyberjaya for 10 years, and opened another in Prague in 2004, both of which serve as disaster recovery centers and data hubs for the global logistics provider's various divisions.

“There is a very small chance of natural disasters here in Malaysia, we find excellent English language and IT skills here, and it's a very good location for moving people in and out,” says Dave Adams, head of middleware support, and data center facility manager. “We have a very good relationship with the Malaysian government in terms of moving people from here to Europe and vice versa to get to know their counterparts. Though we are a global organization, we don't have the cultural differences between Europe and Asia that there might otherwise be.”

Adams says work force availability and grants from Malaysia's Multimedia Development Corporation (MDeC) Sdn Bhd are additional considerations for locating data center operations in the country.

“MDeC worked closely with DHL

and were very supportive in terms of our setting up here and training and grant provisions, encouraging us to stay and invest more,” says Adams. “It’s easy to find highly skilled people here, in part because we have good relationships with the universities here. We work with the high-tech institutions in Cyberjaya and some in Kuala Lumpur as well.”

Adams stresses the importance of power to his operation and says he gets strong support from the power provider and from the government. “If there is a major power outage in Malaysia, the number one area that get restored is Putrajaya, because that’s where the government is, and nearby Cyberjaya. It’s very stable in terms of power, so from an infrastructure point of view, that is very important. Also, we’re very close to the [Kuala Lumpur International] airport, and we have everything we need in Cyberjaya — restaurants and banks are within walking distance of this area, and traffic is negligible.”

Adams says DHL has recently extended its lease: “We are definitely here for the long haul. We have invested quite significantly in our high-density room, and we are looking at consolidating a lot of our servers into one main room, which may require leasing some floor space — most likely in a MyTeleHaus facility.” When data center modernization plans are complete, DHL will occupy about 11,000 sq. ft., which could shrink in the future to just 5,000 sq. ft., Adams surmises. “I fully expect our footprint to shrink, rather than grow in the next few years. But I foresee the work force growing, because we will be providing different levels of service.”

The company is launching internal cloud services, among other initiatives, that will require new skill sets. “We will recycle the work force by retraining and getting people interested in new processes.”

In April, NTT Communications Corporation (NTT Com) began construction on its new Cyberjaya 4 Data Center. Operations are slated to commence at the new facility in May 2014. Malaysia Cyberjaya 4 Data Center (CBJ4) will be NTT Com’s fourth data center in Malaysia, expanding its ability to provide new business solutions for disaster recovery, managed services and professional training, which

will be implemented through platform-as-a-service (PaaS) and infrastructure-as-a-service (IaaS) business models.

CBJ4 will feature redundant systems

for commercial and uninterruptible power supply, cooling, power generator and power distribution, plus robust systems for fire and flood prevention. The facility’s 24

A Cyber Security Hub for Cyberjaya

The United Nations specialized agency for ICT, International Telecommunication Union (ITU), had plenty of options as to where to base its cybersecurity arm, the International Multilateral Partnership Against Cyber Threats (IMPACT). It picked Malaysia’s Cyberjaya high-tech district near the capital city of Kuala Lumpur from locations throughout the initiative’s 146 member countries. IMPACT is a United Nations-backed, not-for-profit, public-private partnership that coordinates the resources of governments, academia and private enterprise in reducing the risk of cyber threats.

“IMPACT serves as the cyber security arm of the UN agency,” says Datuk Mohd Noor Amin, chairman of the management board. “We provide the UN member states with assistance and support in the area of cyber security across a wide range of activities, all of which is being delivered from this facility in Cyberjaya.”

Malaysia was chosen as the headquarters for several reasons, says Datuk Amin.



“The Malaysian government foresaw the issue of cyber threats, even before many other governments began talking about it.”

— Datuk Mohd Noor Amin,
IMPACT chairman of the management board

“The Malaysian government foresaw the issue of cyber threats, even before many other governments began talking about it,” he relates. “In 2007, they decided they wanted to provide the world a hub for cyber security, much like Atlanta is home to the Centers for Disease Control (CDC). Whenever there is an outbreak of disease in the world, such as SARS in Asia or Ebola in Africa, the affected governments and the UN will typically work with CDC and its global ecosystem of pharmaceutical companies, international agencies like the World Health Organization (WHO) and government-backed research labs to research for a vaccine, issue the appropriate advisories, standard operating procedures and so forth to the rest of the world. So in the IT sphere IMPACT is the CDC-equivalent as far as cyber threats are concerned.”

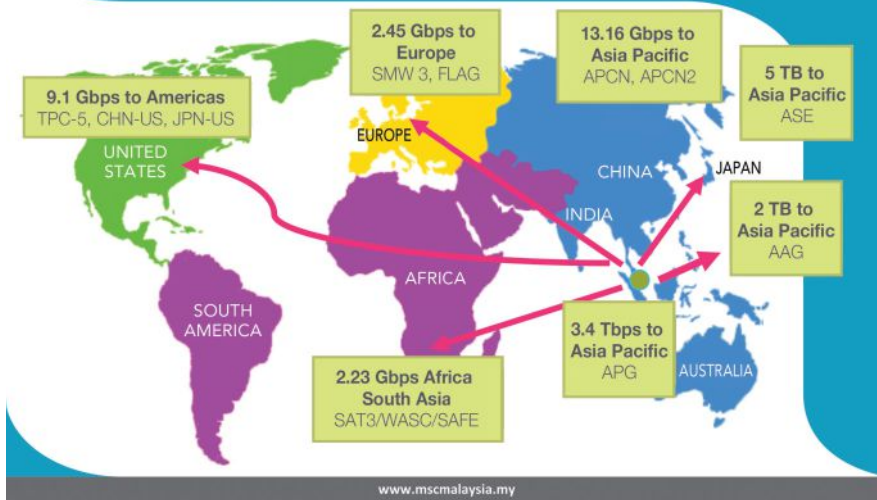
Datuk Amin says Malaysia, and Cyberjaya specifically, is an ideal home for IMPACT due to the “first-world infrastructure at third-world prices. The cost base is very good,” he adds, “and we have the ability to source our knowledge workers from anywhere in the world thanks to Malaysia’s comparatively relaxed immigration policy. Malaysia’s multicultural and multi-religious mix makes it easy for us to attract people to work here. The country’s prosperity, high education standards and low crime rates, coupled with its first world infrastructure makes a very attractive proposition to those considering to relocate here for work.”

Adding to Malaysia’s allure to IMPACT and other data-intensive enterprises is its stable political climate and amicable relations with other countries.

“Malaysia has strong diplomatic ties with China, India, the US and other key markets, so there are no real geopolitical issues for us to contend with,” says Datuk Amin. “We cannot be in a country that is perceived to be hostile to the partners we want to serve, so Malaysia is the perfect home for us in that sense, too. This is a very important consideration for us.”

Malaysia’s Economic Transformation Programme seeks to grow the gross national income of the country’s business services sector — primarily IT services and outsourcing — from RM19.5 billion in 2009 to RM78.7 billion (US\$6.4 billion to \$26 billion) in 2020. Positioning Malaysia as a world-class data center hub is one of six entry point projects (EPPs) identified as key to achieving this goal.

MALAYSIA'S INTERNATIONAL CONNECTIVITY



for foreign investors, particularly in terms of disaster recovery and offshore relocation. Our new Tier III-ready facility will enable us to deliver outstanding service quality to cater to accelerating local and global demands.”

Basis Bay provides green data center development, IT consulting and outsourcing services to companies from four Malaysia locations, including Cyberjaya, and four other offices in Europe, elsewhere in Asia and the US.

“The majority of our clients prefer a Malaysia location for various reasons, including the fact that it is a safe place in which to host a data center compared to the Philippines or Indonesia,” says T. Rajan, technical director. “In Cyberjaya, the infrastructure is world class, so we can deliver on clients’ expectations of high levels of uptime, in part due to support from the government, which encourages data center investment and the IT sector in general.” ▼

This Investment Profile was prepared under the auspices of the Multimedia Development Corporation Sdn. Bhd. (www.mdec.com.my).

x 7 office environment will enable a wide range of business process outsourcing.

NTT Com says its customers will enjoy high-speed, large-capacity Internet access through NTT Com’s global IP backbone and Arcstar Universal One global IP-VPN. The Asia Submarine-cable Express connecting Malaysia, Japan, Philippines, Hong Kong and Singapore will provide CBJ4 customers with extra-low-latency, extra-reliable network, data center and

cloud services on an end-to-end, one-stop basis.

“Malaysia is well positioned to be a world-class preferred hub for data centers,” said Fumitoshi Imaizumi, president and CEO of NTT MSC, a wholly owned Malaysian subsidiary of NTT Com. “Liberal investment policies by the government, solid infrastructure and a large supply of people with IT expertise and multilingual talents offer clear advantages

Data Center Services Directory

Malaysian Data Centre Alliance

www.datacentre.my

Association of Malaysian data center providers

AIMS Data Centre Sdn Bhd

www.aims.com.my

Services: Co-location, managed services, cloud computing, carrier management, network services, consulting, disaster recovery

Basis Bay

www.basisbay.com

Services: Green data center building & consulting, facility management, co-location, cloud solutions, managed hosting and services, disaster recovery, IT outsourcing, hardware solutions

CRF Computer Recovery Facility Sdn Bhd

www.crf.my

Services: Facility management, co-location & hosting services, security management, disaster recovery, offsite storage and document warehousing, cloud computing, online backup and storage

CSF Group plc

www.csf-group.com

Services: Comprehensive data center facilities and services, facility management, CSF Computer Exchanges (purpose-built data centers with extensive backup and disaster prevention systems)

Free Net Business Solutions Sdn Bhd

www.fnbs.net

Services: Server hosting, co-location, remote moni-

toring, managed services, network services, business continuity consulting and planning, storage, disaster recovery, services desks, IT outsourcing

HDC Data Centre

www.hdc.net.my

Services: Advanced data center facility services, co-location, business continuity, secure offsite media storage, data center support services

HeiTech Managed Services Sdn Bhd

www.heitech.com.my

Services: Managed data center services, network & communications, cloud computing, desktop and online backup services, business continuity

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Fields of Dreams



Facebook, Google and Yahoo find the central U.S. to be the right fit for their supersized data centers of the future.

by **RON STARNER**

ron.starner@siteselection.com

In April, Google announced a \$400-million expansion to its existing data center operations in Council Bluffs, Iowa, just across the Missouri River from Omaha, Neb. Photo courtesy of Google

Long before **Facebook**, **Google** and **Yahoo** became household names, the central U.S. was laying the foundation for what would become the most vital infrastructure of the world's three biggest Internet companies.

Large, enterprise data centers — the Holy Grail of the electric utility industry — are the mission-critical facilities of the World Wide Web's "Big Three," and increasingly this triumvirate is finding its field of dreams in Iowa and Nebraska.

All three are investing heavily into huge data center operations in multiple locations around the country, and in some cases around the world, but it's safe to say that right now they aren't finding any better landing sites than those located in

America's bread basket.

In the same fields that just a few years ago farmers raised corn or fed cattle, engineers and developers are building the energy-intensive physical plants that will house the 21st century architecture of the Internet.

Why they came to Iowa and Nebraska is fairly simple. Both states offer ample power, low electric rates, superior telecommunications infrastructure, generous incentives, a highly skilled work force, and government leaders that are solidly pro-business.

When Facebook chose Altoona, Iowa, on April 23 for a \$300-million data center investment, the announcement marked a significant win for Iowa Gov. Terry Branstad and his team at the Iowa Economic

Development Authority.

“Today’s announcement further solidifies Iowa’s position as a destination for tech companies — from major data center operations like Facebook’s to the innovative startups we continue to see popping up around our state,” Gov. Branstad said on April 23. “Our productive work force and our overall cost of doing business help us to win great projects like this.”

Iowa helped lower Facebook’s cost of doing business by providing \$18 million in tax benefits through the High Quality Jobs program. To receive the incentives, Facebook must create at least 31 new jobs at a qualifying wage of \$23.12 per hour and invest a minimum of \$299.5 million into the project.

Local incentives from the city of Altoona were also approved for the deal code-named Project Catapult on the day of the project announcement.

“We’re thrilled to become a part of the Altoona community, and especially appreciative of all the partners who helped make this happen,” said Jay Parikh, vice president of infrastructure engineering for Facebook. “Facebook’s mission is to

future, Facebook executives said. The first building will be a 476,000-sq.-ft. (44,220-sq.-m.) facility that will be constructed to LEED-Gold standards.

Why Facebook Keeps Expanding

The new data center will be among the most technologically advanced and energy efficient of its kind, Facebook officials said, noting that the facility will feature an outdoor-air cooling system and the latest in Open Compute Project server designs.

This is the fourth major data center project for Facebook in the world, joining existing developments in Prineville, Ore.; Forest City, N.C.; and Lulea, Sweden.

The total employment impact in Iowa is likely to be greater than what was initially reported. Facebook currently employs 70 full-time workers in Prineville and 80 in Forest City. More than 2,500 construction workers were involved in the building of

“Facebook has been growing very rapidly over our nine-year history. We have for the last four years been looking at, based on that growth trajectory, transitioning to a model where we design and build our own data centers and design all the hardware that goes into them.”

— Michael Kirkland, Facebook spokesman

connect the world. Thanks to Iowa, we’re building the global infrastructure to bring the next billion people online.”

The 194-acre (78-hectare) site selected in Altoona could accommodate up to two additional data center buildings in the

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You might be surprised by what you'll find growing in Iowa. Leaders in bioscience. Advanced manufacturers. Savvy financial companies. And a workforce that's skilled—and loyal. Together, we've created an environment here in Iowa that's attracting other innovators. Google and Facebook chose Iowa for their data centers. And we have three of the top 10 cities in the nation for data center locations. Our tech industry employs more than 76,000 workers, accounting for \$10.6 billion of our state's GDP. And we consistently have one of the lowest costs of doing business. For your information, Iowa just may be the perfect place for your information too.

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“We are **expanding at all three of our sites in the U.S.** to meet increased demand. We have three owned and operated sites plus several co-location facilities that are located elsewhere around the country.”

— Chuck Whitney, senior manager of data center operations for the central U.S. and Latin America for Yahoo

the Prineville data center.

Michael Kirkland, spokesman for Facebook, says the company's site selection strategy for data centers follows a rigorous and well-tested process.

“We have to plan these projects very far in advance,” he says. “Typically, the site selection team identifies sites where we might need to place data centers. We evaluate multiple sites using a huge list of

criteria — good access to fiber and power; presence of shovel-ready sites; access to renewable energy like wind power; support from local officials; access to quality labor of technicians and other skilled workers; and, of course, access to reliable, redundant power at a competitive rate.”

Before Facebook selected Altoona, a suburban city on the northwest corner of Des Moines, “it was very much a balancing act of all the different kind of criteria,” says Kirkland. “It was a very difficult choice between two or three very strong candidates.”

Nebraska reportedly was in the running for the project, but Facebook officials would not say which criteria gave Iowa the leading edge. Some have speculated that Iowa's leadership position in wind energy — third in the nation in total power generated from wind — may have put Iowa over the top. Facebook has stated that it wants to purchase 25 percent of its power from renewable energy sources by 2015.

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Top States for Data Center Projects 2012

State	Total Projects
Texas	28
North Carolina	14
Virginia	13
Georgia	10
Ohio	8
Illinois	5
Minnesota	5
Wyoming	5
Pennsylvania	5
Kansas	4
Oregon	4
Arizona	4
New York	4
Florida	4

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“The actual data center facilities will be built offsite and then shipped to the location of the data center. They are the size of a semi-trailer. They are built to take advantage of the U.S. highway system.”

— Scott Orr, vice president of public affairs for Fidelity Investments

this won't be Facebook's last data center project on a greenfield site. "Facebook has been growing very rapidly over our nine-

year history," says Kirkland. "We have for the last four years been looking at, based on that growth trajectory, transitioning to

a model where we design and build our own data centers and design all the hardware that goes into them. Prineville is our first owned data center where we built it from the ground up."

The savings in going from leased to owned space for Facebook was substantial. "In April 2011, when we turned on Prineville and compared it to our leased facilities at the time, we found that it was 38 percent more energy efficient at 24 percent lower costs," Kirkland says. "We have increased our efficiencies since then."

Facebook's appetite for data is insatiable. Some 1.11 billion people log in to Facebook — the world's largest social networking website — every month. More than 2.45 billion content items are shared on Facebook every single day.

More than 10 billion messages are sent on Facebook daily, and 350 million new photos are uploaded to Facebook pages each day.

"We store more than 100 petabytes [100,000 terabytes] of photos and video for our users," says Kirkland. "That data store is growing by seven petabytes a month."

To put that into perspective, one terabyte equals 1,000 gigabytes of data. The first one-terabyte hard drive did not exist until 2007.

Escalating demand means that Facebook must constantly upgrade its infrastructure. "Our team tries to plan for the future," Kirkland adds. "We are continually evaluating multiple potential locations in regions all around the world. We did want to have capacity in the central U.S. We already had capacity on the West Coast in Oregon and on the East Coast in North Carolina and Virginia."

Facebook maintains several Hadoop clusters, the largest of which is more than 100 petabytes in size. More than 500 terabytes of new data is ingested into these clusters every day.

"Our data warehouse has grown



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Located on the shores of the Gulf of Finland, this Google data center in Hamina, Finland, is one of seven large data centers that Google owns and operates outside the U.S. Photo courtesy of Google

nearly 4,000 times in the last four years,” says Kirkland.

For now, he adds, “we are in the process of provisioning the second buildings in Oregon and North Carolina, and we are getting ready to turn on the first data halls in Sweden. We will break ground in Iowa in the next month or two.”

Google Calls Council Bluffs

Both Google and Yahoo are also experiencing unprecedented levels of user demand for data, and like Facebook, they are spending big bucks on expanded data center facilities in the former cornfields of Iowa and Nebraska.

Google, the world’s largest search engine, confirmed in April that it will invest \$400 million to expand its existing data center in Council Bluffs, Iowa, just across the Missouri River from Omaha, Neb. The Google site is 126 miles (202 km.) from the Facebook site in Altoona.

Google, which handles more than 5 billion Internet searches a day from users around the world, originally spent \$600 million on the Council Bluffs site in 2009

before adding another \$300-million site across town in 2012. The Southlands site in Council Bluffs received an additional \$200-million investment from Google last November.

With the latest announcement, Google’s total capital investment into its two sites in Council Bluffs will be pushed to \$1.5 billion. More than 130 full-time jobs have been created to date by Google in the Iowa community.

The company’s latest expansion announcement came just two days after it revealed that it would invest an additional \$600-million into its existing Caldwell County data center in Lenoir, N.C.

Google also operates data centers in Berkeley County, S.C.; Douglas County, Ga.; Mayes County, Okla.; The Dalles, Ore.; Quilicura, Chile; Hong Kong; Singapore; Taiwan; Hamina, Finland; St. Ghislain, Belgium; and Dublin, Ireland.

Google’s media office notes that that Council Bluffs provides “the right combination of energy infrastructure, developable land, and available work force for the data center.”

Microsoft added to the Iowa bonanza on June 21 by announcing a \$677.6-million expansion of its existing data center in West Des Moines. The project, which is expected to create 29 new jobs, is eligible to receive up to \$20 million in tax credits.

Yahoo, meanwhile, continues to expand the data center that it first opened in La Vista, Neb., near Omaha in early 2010. The original \$100-million investment

included a data center and customer-care center that created a total of 200 jobs.

Yahoo acquired an existing 300,000-sq.-ft. (27,870-sq.-m.) shell building on a 24.3-acre (9.8-hectare) parcel in La Vista in 2008 following a 17-state site search. Today, the site employs 250 workers and,



Chuck Whitney, senior manager of data center operations for the central U.S. and Latin America for Yahoo

U.S. Still World's Safest Data Center Location

The United States has retained its status as the lowest-risk destination in the world for building and operating data centers, according to a survey by Cushman & Wakefield, HurleyPalmerFlatt and Source8.

The report, released in May, evaluates risks that are likely to affect the successful operation of data centers in the world's 30 most important markets. The U.S. leads the 2013 Data Center Risk Index with a score of 100, followed by the UK, Sweden, Germany and Canada in the top five.

"In the U.S., factors such as robust Internet bandwidth, capacity and connectivity and stable power costs contribute to its top ranking," said Jeff West, director of Cushman & Wakefield's data center research in the Americas. "Throughout the Americas, secondary and maturing markets hold an abundance of potential."

Tenant activity in major U.S. markets is showing renewed vigor, particularly in the San Francisco Bay Area and Northern Virginia, says the report. Loudoun County, Va., for example, continues to be a national leader with 8 million sq. ft. (743,200 sq. m.) of data center space either existing or under development right now.

Greater Toronto makes up the majority of the Canadian data center market, which ranks as the fifth-safest in the world, the report states. "Demand has been strong in all major Canadian metros for some time," the study notes.

The top 10 data center markets in the world, according to the report, are as follows:

Rank	Country	Index Score
1	United States	100
2	United Kingdom	89.53
3	Sweden	82.29
4	Germany	81.29
5	Canada	81.16
6	Hong Kong	79.63
7	Iceland	79.47
8	Norway	79.45
9	Finland	78.74
10	Qatar	78.37

with the expansion, the work force could grow to 270.

The Nebraska site is unique in the Yahoo system because it also serves as the main manufacturing plant for the Internet giant. Yahoo now assembles at its La Vista facility all of the servers that go into the firm's other two main data centers in Quincy, Wash., and Lockport, N.Y.

Nebraska passed a special law last year that exempts Yahoo from paying sales tax on computer hardware that it assembles and ships out of state to its own data centers.

"We are expanding at all three of our sites in the U.S. to meet increased demand, says Chuck Whitney, senior manager of data center operations for the central U.S. and Latin America for Yahoo. "We have three owned and operated sites plus several co-location facilities that are located elsewhere around the country."

More than 700 million unique users log onto a Yahoo site every month, and more than 105 million people around the world use Yahoo email daily. About 35 million hours are spent each day by users accessing, composing and sending Yahoo emails.

"Since launching the new Yahoo Mail for iOS, Android and Windows 8, daily active users on our apps are up more than 50 percent due to our newfound presence on multiple platforms," says Yahoo spokesperson Suzanne Philion.

Yahoo's recent \$1.1-billion acquisition of social media upstart Tumblr is expected to add considerably to Yahoo's data center services demand.

Whitney notes that Yahoo's primary site criteria include "architectural and structural requirements, geotechnical and environmental issues, power availability and cost, flood plain factors, zoning requirements, available land, and associated real estate and development costs."

Fidelity Debuts New Model

Tim O'Brien, economic development manager for the Omaha Public Power District, says that specialized incentive programs designed to benefit data centers have made a world of difference in Nebraska.

"We have changed the Nebraska Advantage program three times specifically for data centers," he says. "We are a leader in qualified sites. Nebraska has funded four

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Google maintains a sizable data center in The Dalles, Ore., which benefits from access to inexpensive power courtesy of The Columbia River.

Photo courtesy of Google

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sites for future data center development in Fremont, Kearney, Aurora and South Sioux City. The big three location factors for this industry are taxes, power rates and the presence of building-ready sites. From a pure business-climate standpoint, we are now as competitive as any state in the nation for data center projects.”

Nebraska’s power rates typically are 20 percent lower than the national average. “For data centers we are in the 5.5-cent-per-kWh range depending on load profile,” says O’Brien.

Data center projects that invest at least \$200 million and create at least 30 new jobs in Nebraska are eligible to receive a personal property tax exemption for 10 years, along with a sales tax exemption and a real property tax refund, says O’Brien.

As a result, Nebraska is reaping a windfall of data centers. **Fidelity Investments**, for example, is moving forward with a \$200-million data center project in Papillion in Sarpy County, near Omaha.

Code-named Project Photon, the installation represents the next generation of data center technology for the global financial services company. Set to be



Facebook's data centers in Lulea, Sweden, and Forest City, N.C., are among the busiest in the world, as the global social media giant now transmits more than 10 billion messages and uploads 350 million new photos every day. Photos courtesy of Facebook

operational in 2014 and employ 35 people, the facility will use Fidelity's new Center-Core building model.

"The actual data center facilities will be built offsite and then shipped to the location of the data center," says Scott Orr, vice president of public affairs for Fidelity. "The individual units are assembled in North Carolina. They are the size of a semi-trailer. They are built to take advantage of the U.S. highway system. They are shipped and then attached on site in individual pieces. It is like adding a component of a building."

The modular data centers come equipped with all heating and cooling infrastructure "already plugged in," says

Orr. "There is a core building — a base building — that is being built on site in Papillion. Once that core facility is in place, Center-Core will add the actual data center capacity that is needed to the site."



Scott Orr, vice president of public affairs for Fidelity Investments

Orr notes that Fidelity is taking the lead in "the evolving technology of data centers. Fidelity can create much more efficient data centers than we did three years ago."

Orr says Fidelity likes the Greater Omaha area for several reasons. "It is

the center point of the country and it has geological stability," he says. "Many robust power-generating companies are there to ensure that you will have affordable and reliable power. A qualified work force is there too. They have a handle on training and making the labor pool available to data center operators like Fidelity." ▼

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Seal of Approval

AEP follows a systematic approach to qualify sites for data centers.

Rapidly escalating demand for new data centers puts added pressure on site selectors to find qualified locations.

The problem? Not all data center sites are created equal.

American Electric Power recognizes that fact, which is why the Columbus, Ohio-based utility has launched a site qualification program that seeks to take the guesswork out of the process.

The program — believed to be one of the first of its kind in the U.S. — culminated June 4 with the official announcement of nine “Data Center Qualified Sites” for AEP, one of the nation’s largest utilities.

Following a comprehensive review of locations across AEP’s 11-state territory from Michigan to Texas, the Princeton, N.J.-based consulting firm of Biggins Lacy Shapiro qualified sites with reliable and redundant power, strong fiber networks, low disaster risks and a business-friendly climate.

AEP’s nine Data Center Qualified Sites — locations receiving a virtual “seal of approval” — are as follows:

- **Bradley Square** in Bradley, W.Va.
- **Cherokee Expressway Industrial Park** in Tulsa, Okla.
- **Findlay Commerce Park** in Findlay, Ohio
- **Victoria Site** in Victoria, Texas
- **Industria Centre** in Muncie, Ind.
- **National Cyber Research Park** in Bossier City, La.
- **Progress Park** in Wytheville, Va.

by **RON STARNER**

ron.starner@siteselection.com

- **Roanoke County Center for Research and Technology** in Salem, Va.
- **Wolpert Greenfield Site** in Hilliard, Ohio

BLS teamed with its energy service affiliate, Sugarloaf Associates, to design and implement a three-phase evaluation program that analyzes the electric supply and capacity, access to long- and short-haul fiber providers, water availability, electric costs, tax exemptions and incentives, demographics, vendor-supplier networks, and the ability to complete construction of

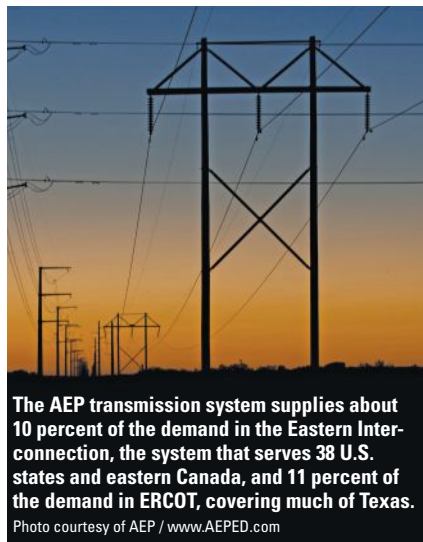
a data center facility within 18 months.

A third-party engineering firm — Intelligent Building Systems — was then hired to model each site’s ability to accommodate a 100,000-sq.-ft. raised-floor data center designed to current industry specifications.

“The data center pre-qualification process allows us to clearly understand the needs of the data center users and distinguish AEP as an electric utility able to support those needs. It gives our service territory an advantage in the highly competitive site selection process for data centers,” says Mark James, CEcD, vice president of economic and business development for AEP. “BLS helps us objectively evaluate sites and provides a deliberate, disciplined approach to collecting and presenting the information needed by data center users.”

Not Just a Site Review

AEP, whose service territory spans 250,000 square miles of the U.S., has a long history of providing competitive sites for data centers, including recent location projects from Discover, TJ Maxx and Citicorp. An HP data center in Tulsa is one of the “greenest” in the industry, relying primarily on non-fossil fuels for power and using water to cool the server space. It also uses biometric access for security and has walls that can withstand winds up to 300 mph. With the advent of the qualified sites initiative, James believes that AEP is poised to become a dominant player



The AEP transmission system supplies about 10 percent of the demand in the Eastern Interconnection, the system that serves 38 U.S. states and eastern Canada, and 11 percent of the demand in ERCOT, covering much of Texas. Photo courtesy of AEP / www.AEPED.com



Rendering courtesy of AEP

The Roanoke County Center for Research and Technology in Salem, Va., is one of nine qualified sites for data centers in AEP's 11-state service territory.

in this highly competitive field for a long time to come.

“Third-party validation makes a big difference,” says James. “This is really the equivalent of a Good Housekeeping Seal of Approval for data center sites. This program means that all of our qualified sites have been thoroughly vetted and that the data we have on them is highly credible and third-party sourced. This counts for a lot when you are talking to a prospective end-user.”

Tracey Bosman, managing director for BLS, heads up the site qualification process for the consulting firm and notes that it is the most comprehensive and demanding in the industry.

“Before we even looked at the individual sites or evaluated the costs of power, we reviewed the utility policies and tariffs that were in place,” Bosman says. “It is not just a site review. AEP has done a very rigorous review of all of these policies and procedures that can affect data centers. AEP is not the first to do a qualified sites program, but they have taken it to a whole new level in focusing on the data center sector.”

Tim Comerford, principal of Sugarloaf Associates and senior vice president of BLS, notes that “the electric infrastructure and fiber availability are the two most common traits of these nine qualified sites. Their service policies and cost to supply service are also very good. We found them to be competitive across the board on power rates, and they are extremely competitive on rates when you compare them to Chicago and places in the Northeast.”

James explains that the new program originated out of an idea two years ago. “I came back to the utility in November of 2011 and I discovered then that a lot of our communities in the AEP service ter-

ritory had not gone through an exercise of identifying their suitability for any kind of use,” he says. “In our economic development efforts, that is one of the things I knew we needed to budget for — development-ready sites and buildings.”

James says he attended a couple of data center conferences and “learned that the central part of the country was becoming the preferred location for data centers for a variety of reasons. The industry had become very active, and we had the

opportunity for AEP and its service territory, says James. “The fact that this is a rapidly growing industry sector is a significant factor,” he explains. “The best utilities skate to where the puck is going to be with their business. It is only prudent that we identify and direct the activity to locate where we will serve them well.”

Comerford notes that “demand for data centers continues to grow. Demand for new data center space is growing at 20 percent a year on the coasts and double that in the central part of the country. Everyone wants streaming video now, and that places an added demand on data delivery. And with the new requirements of the federal health-care legislation, medical records have to be stored digitally and available online now.”

Bosman says the exponential proliferation of data will not abate anytime soon. “Ninety percent of the data we use every day was created in the last four years,” she says. “And we are constantly adding to that storehouse of new data every single day.”

Escalating demand is also putting a strain on investment capital. “An investment of \$2,000 per square foot is the typical cost to build a data center,” says Comerford. “And it can cost \$50 million a year to refresh a 130,000-square-foot data center. That is pretty typical.”

Because of these high investment costs, says Comerford, “you don’t make that investment until you absolutely have to. So when a data center end-user makes the decision to build, they need to move extremely quickly.” ▼

This investment profile was prepared under the auspices of American Electric Power. For more information, contact Mark James at 614-716-2396 or by email at mjijames@aep.com. On the web, go to www.AEPdatacenters.com.



characteristics that made us conducive to data centers.”

Electric utilities like data centers because they have very high load factors — typically in the 90-percentile group in load factor. Also, housing a data center in a community provides a capacity for hospitals, research and development centers, and other intensive users.

In short, “data centers are very desirable operations for AEP and our community partners,” says James.

Muncie, Ind., is a case in point. “Five years ago, I don’t think they would have gotten any looks from data center operators,” James adds. “Now, thanks to our qualified sites program, they have gotten lots of looks.”

Big Dollars at Stake

Data centers also offer a future growth

Answering The Call

Analysis and modeling of renewables will help Verizon in rugged terrain and back at the office.

This case study was prepared exclusively for Site Selection by project leaders from Verizon and the National Renewable Energy Laboratory.

Verizon delivers wireless network and fiber optic network services through thousands of transmission sites nationwide. Many of the transmission sites, which require electricity to operate, are located in extreme, remote areas, such as mountaintops or desert valleys. Currently, Verizon leverages generators and liquid fuel as power for its electronics at its off-grid sites. The ongoing operation and maintenance requirements for these remote generators add to the burden.

“Reaching remote transmission sites is challenging at best due to rugged terrain and rough weather conditions,” says Roger Maiorano, principal engineer with Verizon. “Some of them are only accessible three months of the year, if we’re lucky. This makes reliable, redundant power systems a must.”

Through a partnership with the U.S.

Department of Energy’s National Renewable Energy Laboratory (NREL), Verizon set out to find a better way to power its off-grid sites and save on fuel storage and delivery costs, while improving reliability.

“We looked at a number of technical assistance options, but none offered the third-party, nonbiased analysis that NREL has perfected,” says Maiorano.

Assessing Options

Using the HOMER energy modeling software (www.homerenergy.com), which analyzes off- and on-grid scenarios to design hybrid power systems by combining site, renewable resource availability, incentives, and financial data, NREL assessed six of Verizon’s remote network transmission sites in California, Nevada, Oregon and Washington. Verizon selected those sites based on fuel distribution costs, weather, and location with the goal of improving reliability and reducing fuel delivery costs using available renewable energy resources.

Because renewable energy resources can vary hour-by-hour, HOMER provided detailed analysis models and renewable energy system options with operating performance outlined for each of

Solar Energy Systems installed this solar PV rooftop system in New York City.

Photo courtesy of NREL

the 8,760 hours in a typical year. It also estimated capital costs, operations and maintenance costs, and life-cycle costs for the recommended renewable energy technology (or combined technologies), as well as the levelized cost of energy for each.

These parameters were then evaluated against Verizon’s business goals and electricity needs to identify available renewable energy options and technologies. Technology characteristics and limitations for each option were further analyzed to ensure optimum system reliability while minimizing costs and operations and maintenance requirements.

The NREL analysis resulted in recommendations for solar- and wind-based renewable energy system performance specifications and suggested other technology options, such as alternative battery systems, for each site assessment that would prove to be life-cycle cost-effective compared to off-grid generator and liquid fuel use.

Next Steps

NREL’s proposed system specifications should increase transmission site reliability by providing additional source options, making liquid fuel delivery less critical and allowing Verizon to plan delivery based on weather instead of immediate need.

The initial site selection phase identified and prioritized sites based on the cost of operating generator and battery systems at each, which involved the remoteness of a site and obstacles like snow accumulation. The NREL studies provided information needed for the next phase of site selection, which factored in land availability and engineering and economic details that affect implementation.

“Once we established the technical and economic viability of a renewable energy project, we took a comprehensive, 360-degree look and considered all the land-use planning, permitting and regulatory issues that would affect the project,” says Andy Walker, principal engineer at NREL. “We have to be especially concerned about how projects affect Verizon operations and reliability, and their need to standardize among a very large number of cell phone tower sites.”

NREL’s analysis showed that Verizon could reduce the cost of powering these



sites by 45 percent or more through the use of solar photovoltaics (PV), wind turbines, and additional batteries. The proposed system specifications would meet over 90 percent of each site's energy demand with renewables, leaving the propane-fueled generator as a secondary power source a majority of the time.

Estimated Verizon fuel and emissions savings vary from 5,841 gallons of propane per year (and 35 tons of CO2 emissions per year) for a desert site with 15 kW of PV and 7.5 kW of wind power, to 14,656 gallons of propane (and 87 tons of CO2 emissions per year) for a mountain peak with 34 kW of PV and 15 kW of wind power capacity recommended.

Currently, Verizon is prioritizing off-grid transmission sites for renewable energy implementation (and looking at five additional sites with NREL) with plans for ongoing deployment as outlined by the NREL analysis. Future plans include expanding site assessments to screen the company's 49,000 on-grid sites, with NREL providing analysis and support along the way.

While some of Verizon's sites are beginning to implement renewable energy technologies, the process can take

several years due to real estate planning, environmental permitting, construction, approval processes, and other factors that can impact each project's schedule and completion. But Verizon is committed to facing these challenges.

"Each of our sites has a different story," says Maiorano. "Each has its own climate, wind, and solar exposure as well as available land to locate equipment. We're pursuing them all and making strides to improve the reliability of our remote transmission sites with renewable energy options."

Verizon's Larger Renewable Energy Initiative

The information and communications technology industry is one of the most energy-intensive industries in the world, which led NREL and Verizon to sign a first-of-its-kind agreement to explore a variety of possibilities for using clean energy and improving energy efficiency.

"Solar, wind, geothermal and fuel cells are clean technologies that can contribute to our sustainability goals," says Alan Scott, Verizon's Green Energy lead. "Verizon continues to explore ways that we can partner with NREL to capture

the environmental and economic benefits at our corporate facilities, data centers, central offices, cell sites, and retail stores. Opportunity is everywhere; you just need to view the world through a green lens, and that cultural transformation is real and happening now."

Verizon recently announced plans for a larger renewable energy initiative to meet its goal to cut 50 percent of its carbon intensity (carbon emissions produced per terabyte of data) by 2020. The company is investing \$100 million in solar and fuel-cell energy projects to help power 19 of its facilities in seven states. These facilities include corporate offices, call centers, data centers, and central offices. The estimated results will generate more than 90 million kilowatt-hours of clean energy and prevent more than 15,000 metric tons of carbon dioxide emissions.

"This is a natural evolution of our sustainability efforts and of our use of alternative energy to power a variety of our facilities," said James Gowen, Verizon's chief sustainability officer. "These projects will reduce our carbon footprint, relieve demand on the electrical grid, and enhance the resiliency of our proven service continuity — even during outages." ▼

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Where is Nestlé Not Investing?

A German project illustrates the confidence this conglomerate has in the underlying strength of Europe.



Photo courtesy of Nestlé

by **MARK AREND**
mark.arend@siteselection.com

Nestlé headquarters on the north shore of Lake Geneva, in Vevey, Switzerland.

Someone tell Nestlé that Europe's economy is on the ropes. In the past 18 months, the Vevey, Switzerland-based nutrition and food services giant has invested in new facilities in France, Germany, Spain, Switzerland — and three in the UK (not to mention China, Jamaica, the UAE, Malaysia and Argentina, among other places). It's also expanding a Purina pet

food factory in Bük, Hungary, adding 150 jobs to that site.

Nestlé management knows full well the company's many markets, of course — including Europe, where the multinational, with dozens of consumer brands in its portfolio (Gerber, Carnation, Buitoni and Perrier to name a few), has been expanding for 140 years.

In May, it began construction on a new

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factory that represents the company's largest-ever investment in Germany. German Chancellor Angela Merkel joined Nestlé Chief Executive Paul Bulcke at a ceremony to lay a foundation stone for the company's €220-million (US\$288-million) Nescafé Dolce Gusto site in Schwerin, in the state of Mecklenburg-Vorpommern. The factory is expected to create about 450 new jobs. Nescafé Dolce Gusto is a coffee pod and machine system for making gourmet coffee at home.

"In spite of the difficult economic environment, we believe in Europe's strength," said Mr. Bulcke. "We are convinced that growth is possible. This is why we are not only investing right now, but continuously, in the European market and in convincing innovations, modern technology, and highly qualified employees.

"This factory is not only our biggest investment in Germany, but one of our biggest-ever investments in Europe," he continued. "It reflects our long-standing commitment to Germany and illustrates our deep trust in a country where we have



had successful operations for 110 years."

Germany is Nestlé's fourth biggest market worldwide and its number one market in sales of Nescafé Dolce Gusto. The factory in Schwerin will be the company's third fully dedicated Nescafé Dolce

German Chancellor Angela Merkel speaks at the announcement of Nestlé's most substantial investment to date in Germany a €220-million (US\$288-million) Nescafé Dolce Gusto production facility.

Photo courtesy of Nestlé

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Food and Agribusiness Companies Prosper in Greater Minneapolis Saint Paul

Greater Minneapolis Saint Paul (MSP) should definitely be on your short list for relocation or expansion. Why? Whether you're involved in growing, trading, distribution or manufacturing, the region has one of the most dynamic agriculture, commodities and food production communities in the country. From seed technology and development to food manufacturers and packaging, companies in the Greater MSP region dominate the food production cycle.

It's why Greater MSP is home to some of the most renowned food and agriculture companies and organizations in the nation, including General Mills, CHS, Land O'Lakes, Cargill, Hormel, Ecolab and many more.

Minnesota ranked as the sixth largest agricultural exporter in the United States and the seventh for certified organic farming. According to the U.S. Census of Agriculture, in 2012, Minnesota farms generated \$13.2 billion in agriculture products, 53% in crops, vegetables and nursery crops and 47% in livestock. Approximately half of Minnesota's land is dedicated to farming.

The agriculture and food industry is the region's second largest employer. In fact, Greater MSP has more food scientists than any

other region in the nation and boasts the highest food and agriculture labor force participation rate in the country. Whatever your talent needs are — food science, safety, manufacturing or marketing — your business can draw from one of the most highly experienced talent pools in the country.

Greater MSP's food and agriculture industries are thriving, thanks to research and innovation. This is fueled by the area's remarkable 36 colleges and universities. Educational institutions such as the

University of Minnesota and Minnesota State Universities offer vocational, undergraduate and graduate programs in food science and technology. Research facilities at the University of Minnesota's Department of Food Science and Nutrition provide state-of-the-art equip-

ment and instruments for food analysis and processing. The Hormel Institute, a world-recognized leader in food science, is producing groundbreaking research showing the dietary factors that prevent and control cancer.

If you're considering relocating or expanding your business and want to prosper, contact Greater MSP and find out more about our thriving, world-class food and agricultural community.

“The region boasts a track record for sustained success few communities, even globally, can match.”

— Ken Powell, CEO, General Mills

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Located in suburban Minneapolis, General Mills is one of the world's leading food companies. It operates in more than 100 countries with brands including *Cheerios*, *Fiber One*, *Häagen-Dazs*, *Nature Valley*, *Yoplait*, *Betty Crocker*, *Pillsbury*, *Green Giant*, *Old El Paso* and *Wanchai Ferry*.

Camille Gibson, Vice President Marketing for *Cheerios*, *Wheaties* and *Fiber One*

Gusto site, after Tutbury in the UK and Girona, Spain. It will produce around 2 billion capsules per year for the German, Scandinavian and Eastern European markets.

Sustainable Water Bottling

In March, Nestlé Waters marked the inauguration of a new, £35-million (\$54-million) water bottling facility in Buxton, UK, which bottles Buxton natural mineral water and Nestlé Pure Life spring water. Also in the UK, the company in 2012 invested in its Product Technology Centre for confectionery, in York. The same year saw the Purina factory expansion in Hungary and a \$321-million Nespresso factory in Fribourg, Switzerland.

“The Buxton factory is an excellent example of how we are continuing to invest in Europe despite tough economic conditions,” said Paul Bulecke at the open-

ing event. “This factory will contribute to accelerate the development of our bottled water activities and illustrates our capacity for innovation in production facilities via an approach that combines strong and sustainable production efficiency with outstanding environmental performances,” he continued.

Mr. Bulecke was joined by Lord de

“This factory is not only our biggest investment in Germany, but one of our biggest-ever investments in Europe.”

— Nestlé CEO Paul Bulecke

Mauley, Environment Minister for the Department for Environment, Food and Rural Affairs in the UK.

“Investments like this in our food and drink industry help generate economic growth and create more jobs,” he said.

“This investment will ensure Buxton remains the home of Nestlé Waters’ bot-

tlng facilities long into the future, which is good news for the local community, the economy and the environment.”

The new factory is reducing its environmental impact in a number of ways, including cutting energy use and the amount of packaging it uses. For example, Nestlé Waters bottled water products are manufactured using an average of 25 percent less PET plastic across its range, compared to previous products. The factory’s heat recovery system is recycling energy from the production process to help heat the ware-

house and offices at the site. And a new drainage system is helping to sustainably manage rainwater.

The new factory is Nestlé’s most recent multi-million-pound investment in the UK. The company invested £40 million (\$61 million) over the past few years to create a European center of excellence for Nescafé Cappuccino in Cumbria. In 2012, it announced a £310-million (\$477-million) investment in its coffee manufacturing business in Tutbury, Derbyshire, creating 425 new jobs. ▼

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Top U.S. States for Food Processing Projects

(Jan. 2012 – May 2013)

Pennsylvania	27
Texas	26
Michigan	23
Ohio	22
Georgia	18
Illinois	16
Tennessee	15
Virginia	15
Kentucky	14
New York	12
North Carolina	12

Source: Conway Data Inc. New Plant Database

Frozen Asset: Top Gelato Maker Repurposes an Ice Cream Plant

A former Kroger ice cream production plant in Marietta, Ga., is now in the gelato-making business. Twin Cities-based Talenti Gelato was about to close on a facility near Minneapolis when management learned of an available facility in Cobb County, on the northwest side of Atlanta last summer. Most of the company's operations had just relocated to Minnesota from the Dallas area, so the addition of a production plant there would have made perfect sense.

Relocating Texas staff to the Atlanta area was deemed to be an easy sell, says Talenti founder Josh Hochschuler.

"A lot of the appeal was centered around what a great place the Atlanta area is to live in. We recognized that Marietta is very appealing, with rolling hills and beautiful lakes and streams. You could choose an urban setting or a rural setting and work here."



But the best-selling gelato maker still needed the right building, which it found in an industrial park in Cobb County.

"It had a lot of utilities in place – water and electricity and gas. That saved us a lot

of time and money," says Hochschuler. Talenti had worked with brokers across the country to locate the right site, he says.

"The location is central for distribution," he explains. "A large concentration of our customers are on the East Coast, so in terms of logistics, it makes a lot of sense to be in Atlanta."

On the labor side, Hochschuler credits Georgia's Quick Start program as being "very helpful in identifying good manufacturing skills in the market." The facility will employ about 150 at full production.

The Marietta location now accounts for 85 percent of Talenti's production, and it has enabled the company to expand its product line to include a gelato pop. That's gelato on a stick dipped in chocolate, Hochschuler notes, requiring space in the novelty section of grocers' frozen food aisles.

— Mark Arend and Ron Starner

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Photo by Chris Bateson

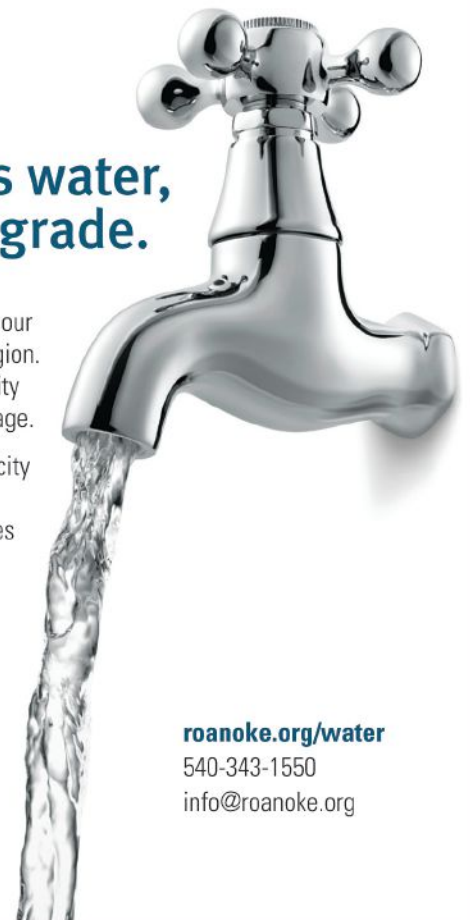
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- How do we raise awareness of our location?
- How can we find and approach potential investors?



Fertile Fields

From multinational giants to technology entrepreneurs, Florida's Heartland region beckons investment capital to locations primed to grow.

by **RON STARNER**

ron.starner@siteselection.com

Companies large and small are betting big on an expected economic resurgence in a Florida region known more for its muck than its money.

If these firms have their way, the six-county region between Lake Okeechobee and the West Coast of Florida will become one of the fastest-growing economies in the Sunshine State in the coming decade.

Investors as diverse as Coca-Cola and CPR Tools are part of this wave of firm belief in Florida's Heartland, an agricultural mecca that stretches from the Peace River in Central Florida all the way south to the northern outskirts of the Florida Everglades.

You won't find a metropolitan area the scale of Tampa, Miami or Orlando in this region, but you will find the spine of Florida's hardest-working population in places like Avon Park, Sebring, Lake Placid, La Belle, Clewiston, Wauchula, Arcadia, Moore Haven and Immokalee.

Whether toughened in the phosphate mines of Hardee and Highlands counties or weathered in the muck-covered sugar-



A friendly welcome sign beckons visitors to quiet DeSoto County, Fla., where produce of many varieties is harvested fresh throughout the year.

“ The fact that a global beverage player is willing to make this kind of investment in the region speaks volumes. ”

— Adam Putnam, Florida Agriculture Commissioner

cane fields of South Florida, the workers of Florida's Heartland typically bring three assets to the job: heart, muscle and an unwavering spirit of dedication.

There's no air-conditioning in the mines of Fort Green or the orange groves of Zolfo Springs. But what you will find in abundant supply these days is optimism.

Atlanta-based Coca-Cola made sure of that when it announced recently that it would invest \$2 billion to plant 25,000 acres of new orange groves in Polk, DeSoto and Hendry counties — the largest single investment into new crop plantings in Florida history.

“It's an investment in a market that's very important to us,” Steve Cahillane, president of Coca-Cola Americas, said at the May 7 announcement at the company's juice-processing plant in Auburndale.

About 5 million orange trees will be planted in the new groves, marking the largest addition to the state's citrus industry since 1998. According to Coca-Cola officials, the new plantings and resulting orange juice production should create about 4,100 new jobs in the regional economy.

At a time when total citrus acreage in the Sunshine State is declining — from 600,000 acres in 1997 to 450,000 acres today — the grove expansion project is expected to add more than \$10.5 billion to Florida's economy over the next 25 years.

'A Real Seal of Approval'

Given that about 90 percent of Florida's oranges are used for juice, the Coca-Cola investment should be a huge boon for the juice-

processing industry throughout Florida's Heartland. Only the nation of Brazil produces more orange juice per year than Florida.

“The fact that a global beverage player is willing to make this kind of investment in the region speaks volumes,” says Adam Putnam, a former U.S. congressman who now serves in the Florida Cabinet as commissioner of agriculture. “The other half of that announcement was that two growers would split 25,000 net new acres going into production in the Heartland, and that is truly historic.”

Brazilian juice-maker Cutrale and Bill Becker's Peace River Citrus of Vero Beach, Fla., are sharing in this mother lode of citrus investment. Much of the new crop grown in Becker's groves will end up in the processing operations of Peace River Citrus in the Heartland.

“It's a big help to the entire industry and to the state, for that matter,” Becker said at the time of the announcement.

Putnam calls the Coca-Cola investment “a real seal of approval for the Heartland. Coke could invest anywhere in the world, and they chose to do it right here.

With the building of new intermodal rail facilities and an upgraded inland airport, all the ingredients are in place for the value-added processing and global distribution of products grown and harvested right here in South Central Florida.”

The America's Gateway Logistics Center in Moore Haven in Glades County is a joint venture of Lykes Brothers Inc. and A. Duda and Sons Inc. Planned for 6,700 acres, AGLC is being designed to become the leading logistics solution for growers, packers and processors throughout the Heartland region.

Airglades Airport in Hendry County, meanwhile, is being developed to become a leading international air cargo overflow airport for South Florida. An 11,000-foot runway makes it a viable alternative for cargo being squeezed out of the busy Miami International Airport about an hour to the south.

“On top of all that, Duda is having conversations about a similar logistics infrastructure project somewhere else in the Heartland region,” adds Putnam.

“I see tremendous potential in creating more value-added opportunities in our food-processing and beverage plant operations in this vital region of Florida. Our legacy packing house infrastructure can be restructured for other use, and all of this new development is occur-



Sarasota-based VisApp LLC is expanding by opening a new office in Arcadia in DeSoto County, Fla.



“ I am looking for locations where my technology can help the area. ”

— Bobbie Ayers, founder and principal, VisApp LLC

ring at the optimal time. Blueberry production in

Florida, for example, has increased by 300 percent in the last decade.”

Putnam says Florida’s Heartland — comprising DeSoto, Glades, Hardee, Hendry, Highlands and Okeechobee counties — is poised to become a boom belt as worldwide demand for food and beverage products escalates.

“The food business is going to be very good for the long term,” says Putnam, who grew up in a family citrus and cattle business in Bartow on the Heartland’s northern border. “We have seven billion people in the world and we will be at nine billion by 2050. We have exploding middle classes with demands for higher quality diets and more protein. It will stress our agriculture production globally. In Florida, we are blessed to have an abundance of resources. We have nearly a year-round growing season. We have access to adequate water, sea transportation and land infrastructure. When you talk about the Heartland of Florida, you are talking about a region that has an abundance of highly productive land available for more intensive food production.”

Bumper Crop of Entrepreneurs

Some have postulated that when God created the Garden of Eden, he must have placed it in Florida’s Heartland. The area

around the Kissimmee Valley and Lake Okeechobee have some of the richest soils with the best access to water that can be found anywhere on the planet.

The black topsoil is so moist and thick, in fact, that it also serves as some of the best training ground in the world for top athletes. A slew of college and professional football stars — including Florida Gator football legends Fred Taylor and Reidel Anthony — literally honed their skills by running in this muck.

“The rich muck soils south of Lake Okeechobee are some of the most fertile in the world,” notes Putnam. “It is an extraordinary strategic resource that needs to be protected.”

At the same time, this crop-friendly Heartland is providing some of the best opportunities in Florida right now for enterprising entrepreneurs. Where some folks see only farmland, others see bright young workers seeking a better future.

A case in point is John Benkert, CEO of CPR Tools in LaBelle in Hendry County. His 28-person company provides the data security and data recovery services for all 1,000 stores of OfficeMax nationwide.

“We are renting new space to add another 5,000 square feet to our headquarters here, and we will eventually build a facility that will house all of our employees under one roof,” says Benkert, who relocated himself and his family to LaBelle in 2003 after working for the National Security Agency in Washington, D.C., for



At CPR Tools, high-tech workers recover data from damaged drives, discs and other hardware in a clean-room environment.

many years.

“We are currently spread out in four buildings in LaBelle, with around 20,000 square feet of space,” he says. “We will increase our work force to 40 to 50 upon completion of our new space in the next year. We performed only government work until about five years ago, when we started building products for companies in data recovery. That did really well. About 18 months ago, we started marketing our software and hardware to large retailers.”

The business really began to take off when CPR struck a deal with OfficeMax to become the national retail chain’s primary provider of data security and data recovery services. “We had to hire more data recovery engineers,” notes Benkert.

Hendry County offers CPR everything it needs to thrive, Benkert says. “We can be choosy about our location, and the truth is that this is where I want to raise my family,” he says. “I grew up in the small town of Piqua near Dayton, Ohio, so I like small towns.”

CPR was based originally in Palm Beach. “The previous owners were looking to get out of that crowded area,” the CEO adds. “The firm had been located in Palm Beach since 1987. The founding partners split up in 1995 and the company was renamed CPR Tools. It moved in 2002



The town of LaBelle in Hendry County, Fla., is a sleepy community no more. Thanks to the rise of high-tech firms like CPR Tools, talented technical workers can now find a permanent home here.

// Our central location in Florida makes this a good place for distribution centers. We are right in the middle of the population center of Florida. //

— Mandy Hines, county coordinator for DeSoto County, Fla.

from Palm Beach to LaBelle. It was really all about cost of living and finding a great place to raise a family.”

Linking Back to Education

The necessary infrastructure is in place in LaBelle to support CPR, notes Benkert. “Comcast and CenturyLink are here. Most of the people we hire are technicians,” he says. “They are hardware engineers and software engineers. They all go through our own proprietary training for hardware recovery. We put them through six months of training. They learn in the lab and do actual work on products as they come in.”

He adds that “about a third of our work force are people who graduated from local high schools, moved away to get their college education and then came back to this area to work. We are now encouraging more young people to do that by establishing internship programs at the local high schools and at schools in Fort Myers.”

The ultimate goal is for CPR to build its own facility within the next two to three years, explains Benkert.

“We just completed the OfficeMax rollout for all of their stores in the U.S. in May,” he says. “We hope to build our own plant, and we feel we can thrive from our location in LaBelle. We are just five miles from the Lee County border and only 20 minutes from downtown Fort Myers. Estero, which will soon become the new corporate headquarters for the Hertz Corp., is only a 40-minute drive from here.”

Benkert also credits Gregg Gillman, president of the Hendry County Economic Development Council, with assisting CPR with some critical incentives that are enabling the company to grow in LaBelle.

Benkert is not alone in betting on the high-tech talent of Florida’s Heartland. Bobbie Ayers, CEO of VisApp LLC in Sarasota, is expanding her software design company into Arcadia in DeSoto County.



John Benkert is the CEO of CPR Tools in LaBelle in Hendry County, Fla.

“Our software allows homebuilders to show prospective homebuyers a house with virtually any kind of interior they want,” says Ayers, whose firm plans to grow from four people to 14 employees by the end of next year.

“These are jobs in software design,” she says. “Four years ago, we moved this technology to the cloud. We are developing the mobile app and the iPad app right now so that a homeowner can go online, select a builder and then interact with various builder models. You can literally change out the paint colors, floorings and other interior features virtually on a home before you decide to buy it.”

Ayers says she chose Arcadia for a reason. “I am looking for locations where my technology can help the area,” she says. “We want to train people in the area for these jobs. We have discussed having local colleges help in structuring the course for this, particularly the masking skills.”

Ayers adds that she sees “a lot of potential in the people of this region. Many of the students who graduate from local schools are leaving DeSoto County to find jobs elsewhere in the technology sector. We want to train them in our technology so that they can find employment right here at home. We want to take them from a beginning level and turn them into experts.”

She says she also likes the idea of becoming an employer of choice in a small town. “I would like to have a whole city relying on our success,” she says.

DeSoto’s Day in the Sun

Mandy Hines, county coordinator for DeSoto County, says that success stories like VisApp and Coca-Cola are just the beginning for the area. The 35,000-resident county is poised to grow in several industry sectors, she says.

“The replanting of citrus groves will be a major economic impact on our county,” says Hines. “The Peace River Citrus

juice-processing plants are located in this region, and we are excited about this investment.”

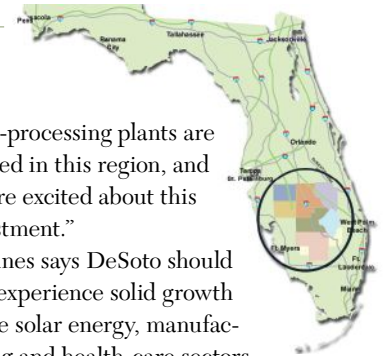
Hines says DeSoto should also experience solid growth in the solar energy, manufacturing and health-care sectors. “Florida Power & Light put in a 25-megawatt solar facility in our county a couple of years ago. It was the largest one in the nation at the time,” she notes. “FPL has plans to expand that facility, and I believe that we will see more solar energy projects in the future.”

Hines points to several location advantages in DeSoto: “We have great proximity to Interstate 75, U.S. Highways 17, 70 and 31, and commutable proximity to multiple international airports and seaports. We are serviced by CSX and Seminole Gulf railroads. We have a 20-square-mile enterprise zone, no building impact fees, access to an abundance of surface water supply to meet growth and industry needs, and local tax abatement authority for qualifying businesses.”

The combination of these factors makes logistics “a great opportunity here right now,” she adds. “Our central location in Florida makes this a good place for distribution centers. We are right in the middle of the population center of Florida. We have the Walmart distribution center here, and we are very close to Port Charlotte and Punta Gorda.”

A recent SRI industry cluster study analyzed DeSoto County and projected that manufacturing and small business should both experience strong growth in the area. ▼

This Investment Profile was prepared under the auspices of Florida’s Heartland Regional Economic Development Initiative. For more information, contact Gina Reynolds at 863-385-4900 or by email at greynolds@flaheartland.com. On the Web, go to www.flahartland.com.



Will Advanced Manufacturing Keep Advancing?

All indications say, 'Yes,' especially in the U.S.

Chances are, any manufacturing still alive today is “advanced” by definition. Competition and complexity — both driven by big data — continue to threaten and cajole industry in equal measure. And certain industries, companies and territories are responding better than others.

A survey of recent research and initiatives reveals where they're overlapping and, hence, where manufacturing stands to gain much more than a toehold when it comes to an innovation footprint.

A study released by the NAIOP Research Foundation in early June concludes that the reshoring trend of manufacturing industries to the United States yields stabilization of jobs, but not net growth.

by ADAM BRUNS
adam.bruns@siteselection.com

That said, some industries will add jobs as others shed them, and the longer-term trend is decidedly toward the positive: The manufacturing sector is expected to level off at an employment level of roughly 11 million jobs between now and 2020, after losing 6 million jobs between 2000 and 2010.

“Employment stabilization across the manufacturing sector bodes well for the overall economy and creates opportunity for real estate,” said Thomas J. Bisacquino, NAIOP president and CEO. “Rising wages in countries like China, increasing global

transportation costs and political instability abroad are all factors affecting the decision to remain [in] or return to the United States.”

What's going to grow, and where? NAIOP weighs in on that question too, with projections (p. 76) that resonate with recent trends in Site Selection's New Plant Database: a resurgence of projects in the Great Lakes and Upper Midwest, and a continuing surge of projects in the Southeast, where the labor-intensive industry long associated with the region long ago began evolving to more advanced forms.

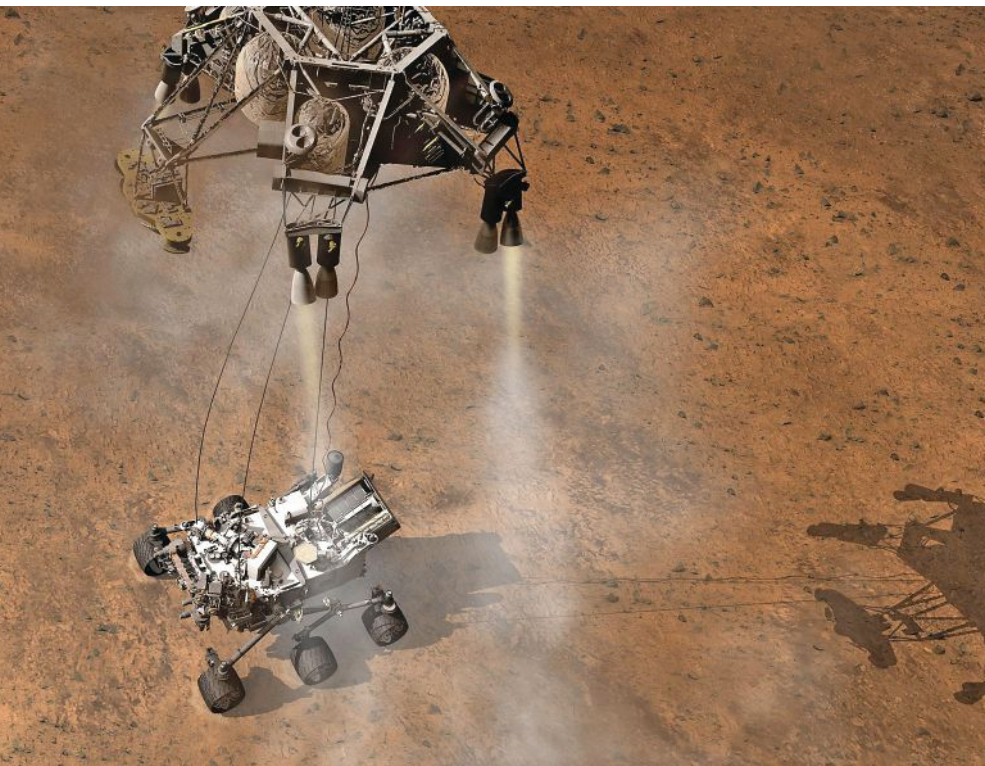
“Between 2010 and 2020, industries generating low labor products, such as chemicals and technology, are expected to expand, and industries generating more labor intensive products, such as apparel, are likely to contract,” says the NAIOP report.

One region in the Southeast is apparently ready to roll.

On June 17, GE announced it would invest \$125 million and build a new 125,000-sq.-ft. (11,612-sq.-m.) advanced manufacturing plant in Asheville, N.C., to make parts from high-grade ceramics called ceramic matrix composites, or CMCs.

The first products will be stationary high-pressure turbine parts for the next-generation LEAP jet engine manufactured by CFM International, a joint venture

Manufacturing doesn't get much more advanced than the Mars rover vehicle "Curiosity," which was successfully deployed last year after simulation and testing by NASA's Jet Propulsion Laboratory (JPL) in Pasadena, Calif., using Siemens Product Lifecycle Management (PLM) software.



Top Five Expanding Industries By Space Usage

Industry	Increase in Square footage (in millions) 2013-2020	U.S. Region
Fabricated metal product manufacturing	86.5	Great Lakes and Southeast
Plastics and rubber product manufacturing	61.5	Great Lakes and Southeast
Wood product manufacturing	45.2	Southeast and Far West
Nonmetallic mineral product manufacturing	32.8	Southeast and Great Lakes
Furniture and related product manufacturing	25.8	Southeast and Great Lakes

Top Five Contracting Industries By Space Usage

Industry	Decrease in Square footage (in millions) 2013-2020	U.S. Region
Computer and electronic product manufacturing	(35.5)	Far West and Mideast
Chemical manufacturing	(30.3)	Great Lakes and Southeast
Apparel manufacturing	(22.2)	Southeast and Far West
Textile mills and textile product mills	(19.4)	Southeast and Far West
Paper manufacturing	(19.1)	Southeast and Great Lakes

Source: NAIOP

between GE Aviation and France's Safran.

Engineers at GE Global Research and GE Aviation's plant-size ceramics laboratory in Delaware developed the material over the last 20 years. They also designed the machines to manufacture CMCs. Pending final approval from the

state of North Carolina, the Asheville facility would be the first of its kind in jet propulsion.

The Delaware plant in Newark is receiving its own \$27-million investment to develop advanced manufacturing methods for the CMCs. The investment will add 70

jobs over five years to the facility's payroll of 80.

GE plans to use the Delaware lab and a manufacturing test bed to supply the Asheville plant with flexible CMCs sheets made from ceramics-coated carbon fibers bound together by a plastic polymer.

Workers in North Carolina would then cut the sheets into shapes, put them inside molds and pack them tightly together in giant pressure cookers called autoclaves, which make the parts take their form. GE estimates that the new plant, along with plant and equipment upgrades across GE's facilities in North Carolina, could create 240 new jobs by 2017.

Two Companies Provide a Map of Innovation

Any effort to track advanced manufacturing's advances would do well to start with the effort, capital and time devoted to the cause by two of the world's corporate giants: GE and Siemens.

Since Jan. 2009, Site Selection's New Plant Database has tracked 51 facility investments from Siemens, nearly all of them involving some aspect of manufacturing, in such locations as Charlotte, N.C.; Shanghai; Israel, India and Russia.

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In the same time frame, we've tracked 106 that involve GE in whole or in part, making everything from solar panels in Aurora, Colo., to turbines in Oslo, Norway, and medical devices in Songdo, South Korea.

Some of GE's investment is just down the road from Asheville in Hendersonville, N.C., where a recent \$35-million investment in improved manufacturing efficiency and speed helped GE Lighting build and deliver 1,000 HID street lighting fixtures in one day when demand spiked after Superstorm Sandy struck the East Coast in 2012.

In April, GE Aviation opened two new advanced manufacturing plants in the South: a carbon-fiber composites factory in Ellisville, Miss., and a "super-alloy" plant in Auburn, Ala., that will manufacture super-alloy blades for high-pressure turbines. The company has invested \$130 million in the plants and plans to hire 550 workers at the two operations by 2017.

GE is becoming one of the largest manufacturers of advanced composites

in the U.S. The company now has four composite plants, including one in nearby Batesville, Miss., which already employs 350 workers.

GE's bets on manufacturing follow CEO Jeffrey Immelt's stint as chair of The President's Council on Jobs and Competitiveness, established in 2011 and allowed to expire after its two-year charter early

“Rather than pare back our investments in new technology during the recession, GE doubled down on its commitment.”

— Mark Little, GE's chief technology officer

this year. In a statement to Bloomberg, Immelt said, "Progress has been made on 90 percent of our recommendations — infrastructure projects have been fast-tracked, regulations are being reviewed and evaluated, and the process time at the Patent and Trademark Office has been accelerated."

The dissolution of the Council doesn't mean the Obama Administration is moving away from manufacturing, however. President Obama in May followed up the 2012 establishment of a manufactur-

ing innovation institute in Youngstown, Ohio, with the launch of competitions to create three new manufacturing innovation institutes by the end of this year with a federal commitment of \$200 million across five federal agencies — Defense, Energy, Commerce, NASA, and the National Science Foundation. The Department of Defense will lead two of the new

Institutes, focused on "Digital Manufacturing and Design Innovation" and "Lightweight and Modern Metals Manufacturing," and the Department of


Energy will be leading one new institute on "Next Generation Power Electronics Manufacturing."

Ultimately the administration is looking to Congress to back a \$1-billion bet on 15 such institutes across the country. The President's FY 2014 budget prioritizes NIST research in advanced manufacturing and crucial cybersecurity initiatives.

Across the Spectrum

GE ushered in spring in April with the launch of two production lines for high-


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efficiency frontload washing machines at its Appliance Park complex in Louisville, Ky., which has made topload machines for 60 years.

The new lines came about because of a \$100-million investment, and mean about 200 more jobs at the complex, where GE in 2010 pledged it would invest \$1 billion to transform its U.S. appliances business and products. Since that announcement, GE Appliances has hired 3,000 new employees in Louisville, 2,500 in 2012 alone.

As part of the \$1-billion investment, GE also is investing in cooking products made in Lafayette, Ga., top-freezer refrigerators made in Decatur, Ala., and side-by-side refrigerators made in Bloomington, Ind.

This summer, the Louisville growth was complemented by the signing of a master agreement between GE Appliances and the University of Kentucky in Lexington to collaborate on research projects that could yield new inventions in the field of major appliances.

A Nov. 2012 ribbon-cutting in Slater,

Mo., celebrated the addition of 115 new jobs in the town of 2,000, where GE

has manufactured filtration technologies since 1975. In addition to these new jobs, over the next five years, GE plans to invest nearly \$11 million to improve its facilities in the area.

Last September, GE Healthcare announced the advanced manufacturing of advanced manufacturing, if you will. It was the introduction of KUBio, an off-the-shelf modular factory for the

biopharma sector.

Designed to meet cGMP requirements while optimizing manufacturing flexibility and productivity, the 1,200-sq.-m. (12,917-sq.-ft.) facility is pre-fabricated and delivered with a complete ready-to-use production line, and can be planned, delivered and constructed in 14-18 months instead of a more traditional time frame of 24-36 months.

"We're already seeing interest from a wide range of customers, from governments wanting to develop in-country

manufacturing capability right through to pharmaceutical companies wanting to expand production capacity in new locations," said Olivier Loeillot, general manager of Enterprise Solutions, GE Healthcare Life Sciences.

Last but not least, one of GE's original innovation hubs — Schenectady, N.Y. — last year saw the launch of a \$100-million high-tech battery manufacturing plant, three years after GE Healthcare opened a \$165-million plant at the Rensselaer Polytechnic Institute (RPI) Tech Park in North Greenbush, N.Y., where workers manufacture digital X-ray detectors. Both technologies were developed at GE Global Research in Niskayuna, N.Y., which has gone through its own \$150-million upgrade.

"Rather than pare back our investments in new technology during the recession, GE doubled down on its commitment, which allowed us to expand our manufacturing base here in the Capital Region and add 1,400 local jobs over the last three years," said Mark Little, GE chief technology officer, last summer. A GE release noted, "the new growth also helped put the area on the map last year as the metropoli-



Jeffrey R. Immelt,
Chairman and CEO, GE

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tan region with the highest concentration of clean-tech jobs in the nation, according to the Brookings Institution.”

The Siemens Highlight Reel

Like GE, Germany’s global giant Siemens is pursuing the twin goals of enhancing its own manufacturing operations while also developing new products to enhance the operations of its customers.

“Never before has the world of manufacturing and production technology been changing as rapidly and fundamentally as today,” said Siegfried Russwurm, CEO of the Industry Sector and Siemens AG Board member, at the Hannover Messe conference in April, noting also that “the completely IT-based interaction between human being, product and machine could prove to be a real industrial revolution.”

Over the coming years, the market for industrial IT and software is predicted to grow at an average of eight percent year-on-year. For that reason, Siemens is concentrating particular attention on expanding its innovation leadership in industrial IT and software. In total, Siemens Industry Sector today employs 7,500 software developers.

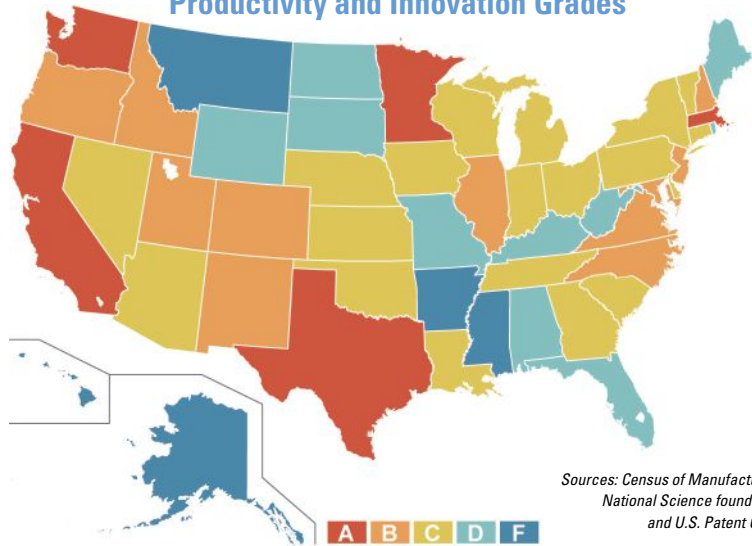
Like GE’s, Siemens’ project list is noteworthy for its mix of established and emerging markets. In other words, a regional economy doesn’t necessarily need to be at its most advanced stage to welcome advanced manufacturing.

- In January, like GE, Siemens got its own hand in on the composites game, as it won an order from Airbus to handle maintenance work on the production

Fresh Rankings Rate States On Innovation

The 2013 Manufacturing and Logistics Report Card, an in-depth analysis from Ball State’s Center for Business and Economic Research, was released in June. Among its various indices is the measurement of productivity and innovation reflected in the map below.

2013 Manufacturing and Logistics Report Card
Productivity and Innovation Grades



Sources: Census of Manufacturers, National Science foundation, and U.S. Patent Office

“Though innovations and inventions are aggressively sought from across the globe, the presence of local talent in these areas through access to university laboratories and non-profit research activities plays an important role in location decisions by manufacturers,” said the report. To measure productivity and innovation, we use manufacturing productivity growth, industry research and development expenditures on a per capita basis, the per capita number of patents issued annually.”

systems at the Airbus factory in Illescas, Toledo province, Spain.

- In April, Siemens Metals Technologies received an order to supply Aktobe Rail and Section Works LLP, Kazakhstan, with a rail and section mill with an annual capacity of 430,000 tons. The

new rolling mill will be constructed in the town of Aktobe under the auspices of Kazakhstan Temir Zholy JSC, the national railway company, and will be the first rail manufacturing plant in Kazakhstan. The rails will meet the fast growing demand for railway equipment

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in Kazakhstan and other CIS states.

- Last July, Siemens entered into a long-term lease at the Technological District in Erzelli, Italy, where it will pool its Genoese activities and establish an Industry Software Center that will host approximately 600 workplaces from 2014 on. The overall investment by Siemens will total more than €20 million. "Expanding our industrial software portfolio is one of our strategic levers for the Siemens Industry Sector," said Russwurm. "Pooling main parts of our activities in Erzelli, Genoa, provides proof of our ongoing commitment to Italy and the expertise of our Siemens Software engineers in the Region of Liguria."
- In May 2012, Siemens broke ground on a new gas turbine manufacturing facility in Dammam, Saudi Arabia. "With this new facility, Siemens is clearly strengthening its long-term commitment to Saudi Arabia," said Michael Suess, CEO of the Energy Sector and member of the Managing Board of Siemens AG. Siemens, in association with Saudi Petroleum Services Polytechnic (SPSP) and the Kingdom's Human Resources Development Fund (HRDF), offers a



Photo: Airbus S.A.S.

Siemens is set to handle maintenance work on the production systems at the Airbus factory in Illescas, Spain, that specializes in manufacturing aircraft components made of composite materials.

two-year technical apprenticeship program provided by SPSP, followed by one year of on-the-job training at Siemens.

- Toward the end of January 2012, Siemens Infrastructure & Cities opened a new plant at its location in the State of Goa, India, to produce network automation components. In the first stage, Siemens has invested around €20 million. The investment is targeting growth

of the work force from 90 to about 500. The factory will turn out network automation products for the construction and expansion of power distribution networks for utilities, industry, infrastructure projects and cities. From this work, Siemens will supply products developed for the growth markets in emerging economies. ▼

The Horton Building

Ohio's newest clean room space

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The Heath-Newark-Licking County Port Authority built a new office and clean room building on its Central Ohio Aerospace & Technology Center campus.

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Environmentally-controlled clean rooms are also a unique aspect of the Horton Building. The building is designed to accept clean rooms built-to-suit in the range from Class 100,000 to Class 10. The first clean room is now ready for immediate occupancy.

SMART
This high-tech building is high-tech itself. State-of-the-art building automation systems will ease customer control over security, lighting, temperatures and message boards across the Port Authority's wireless network.

It's smart to be located where Boeing, UTC Aerospace Systems, Bionetics and the United States Air Force already call home with access to Boeing's new virtual reality laboratory and precision measurement capable to the arcsecond. The building is across from the Pentagon's largest standards lab with 52 commercially certified labs maintaining standards in 19 metrology disciplines.




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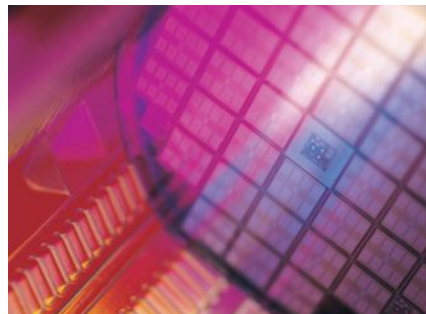
For four decades, the electrical and electronics (E&E) sector has been Malaysia's industrial bread and butter — a foundational sector that has only grown in importance as this Southeast Asian nation marches toward its goal of becoming a high-income economy by 2020. Along the way, Malaysia's government has cultivated the sector in such a way that it keeps pace with investing companies' higher-value E&E activities, including R&D and integrated circuit design and development, keeping them in Malaysia, as most of the 24 member companies of the Malaysian American Electronics Industry (MAEI) association can attest.

"Many MAEI companies have expanded their operations throughout the years," says Dato' Wong Siew Hai, MAEI Chairman, noting that Design and Development (D&D) investments have expanded from RM1 billion (US\$323 million) in 2007 to RM2 billion (US\$647 million) in 2012. "Furthermore, the number of D&D engineers has increased from 2,000 to 5,500 over the last five years. Many companies have set up business process operations in HR, IT, logistics, finance and procurement either to serve the region or the world. Some have even gone further to transfer complete business responsibilities to Malaysia. All of these initiatives are of course in line with the government's focus to encourage the possibility of becoming a higher-income, higher-valued nation known for its quality IT work."

MAEI members include the Malaysian divisions of such electronics giants as Texas Instruments, Agilent Technologies, Intel, Motorola and Western Digital, among others. With just seven years to the 2020 national Economic Transformation Programme finish line, will these and other companies in Malaysia be producing the products and components deemed to be cutting edge at that time? Or will that production be taking place elsewhere?

"The key issue here is talent," says Wong. "Malaysia definitely has a com-

petitive edge, and this can be brought to even more favorable heights if talent can be further maximized." Malaysia has put a series of programs in place to address this issue, he relates. "First, it has taken the industry's input into consideration to encourage more engineers and scientists to pursue Masters and Doctorates through government-funded MyMSc and MyPhD programs. Additionally," he adds, "it has set up a number of Centers of Excellence in the country."



The Centre of Electrical & Electronics, for example, is a government-supported initiative set up by the Northern Corridor Implementation Authority and operated by USains Infotech Sdn. Bhd. that supports SMEs and start-up companies through talent development, research collaboration and access to resources, sophisticated equipment and expertise.

"Furthermore, if we look at attaining achievements in the short term, Malaysia has provided resident passes for expatriates with the appropriate talents to work in Malaysia," says Wong. "On top of this, TalentCorp is working to attract Malaysian talent working overseas back to Malaysia. The government is also reviewing a new education blueprint to improve local education standards."

A Bridge to Sector Prosperity

E&E startups benefit from the government's formation in 2012 of the Collabora-

tive Research in Engineering, Science and Technology Center (CREST), which fosters Malaysia's E&E ecosystem by investing in facilities and equipment, cultivating the talent pool with skills development and serving as a bridge between university research and industrial commercialization.

"CREST is a platform for industry players, academia and the government to collaborate to promote E&E research, design and development activities in Malaysia," says Datuk Noharuddin Nordin, Chairman of CREST and CEO of the Malaysian Investment Development Authority (MIDA). CREST's key activities are grounded specifically in research & development, talent development and commercialization, he says.

"Many activities have been introduced, such as R&D grants to facilitate academia and companies getting together to collaborate on research through which universities can increase their ability to produce industry-ready researchers, and industry players can benefit from the research findings," he elaborates.

"In 2013, The National Key Economic Area (NKEA) will move towards 'E&E 2.0' where a re-clustering of existing Entry Point Projects (EPPs) and the introduction of several new EPPs will take place," says Datuk Noharuddin Nordin. "The main reason for this is in order for the E&E sector to thrive, it needs to move from merely manufacturing activities to include higher-value activities, like design, assembly, packaging and becoming a total solutions provider. By moving up the value chain, the E&E industry will propel the country forward through the creation of high impact jobs, increased Gross Domestic Product (GDP) and Gross National Income (GNI) and attracting more Foreign Direct Investment." ▼

This Investment Profile was prepared under the auspices of the Malaysian Investment Development Authority.

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Contributions And Challenges

Picture this: In a research laboratory on a college campus near you, a researcher has a “Eureka” moment and arrives at a promising, perhaps even world-changing discovery in nanotechnology, biomedicine, renewable energy or the like. How does this promising innovation move quickly from discovery into the marketplace, where it can help create high-wage employment and economic prosperity? This is a problem worldwide, as economies struggle to regain momentum emerging from recession.

One answer to this question is in university research parks, places in which harnessing investments in research and education and empowering university, industry, and government collaboration is the order of the day. These places — variously called university research, science, or tech parks — are increasingly where these partnerships happen, and increasingly where important innovations occur and discoveries take place.

Across the globe, there are hundreds of university research parks, and we have found that the stronger the university connection, the stronger the ability of the park to leverage the competitive advantage of its university or region.

Traditionally, universities have concentrated on the development of an educated

by EILEEN WALKER
editor@siteselection.com

work force, a role that continues to be of vital importance. Today, universities have expanded their economic development roles and are partnering with government,

“We are entrepreneurs working toward the economic development of the entire region.”

— Cameron McCoy, executive director,
corporate engagement office,
University of Oklahoma Research Campus

industry and academia to form a powerful “triple helix.” University research parks stand at the center of this activity, enabling effective, fruitful cooperation among them.

Joint Ventures Are Job Creators

Clemson University’s International Center for Automotive Research is a case in point. After choosing to locate its US headquarters in nearby Spartanburg, S.C., executives from BMW approached Clemson University to explore forming a joint initiative. With investments from the university, the state and BMW now

approximately \$250 million, CU-ICAR has created some 770 on-campus jobs, with spinoff and related industries expected to generate at least 11,000 more jobs off-campus in the near term. As of 2013, CU-ICAR had 109 Master’s and Ph.D. alumni, 91 percent of whom hold jobs in the automotive industry. Underscoring the Center’s commitment to the local economy, 44 percent of them are based in South Carolina. CU-ICAR is expected to grow significantly as an international hub of automotive energy research in the coming years.

Another example is the Joint Institute for Food Safety and Applied Nutrition (JIFSAN) at the University of Maryland (UM) in College Park. Located at M Square, Maryland’s largest research park, JIFSAN was founded as an alliance between the US Food and Drug Administration and the University of Maryland in April 1996. The Institute is a jointly administered, multidisciplinary research, education and outreach program that creates partnerships to increase the quantity and quality of food-related research. Its International Food Safety Training Laboratory (IFSTL) provides an innovative service as the first training facility in the world dedicated exclusively to hands-on training for professionals in laboratory methods

Across the globe, there are hundreds of university research parks, and we have found that the **stronger the university connection, the **stronger the ability** of the park to leverage the competitive advantage of its university or region.**



The National Weather Service Storm Prediction Center is located in the University of Oklahoma Research Campus. The university is a leading school of meteorology in the United States.

Photo: National Weather Service

for food safety. It was born from a unique public-academic-private partnership of UM, the FDA, and the Waters Corporation, harnessing the strength of the FDA Center for Food Safety, also located in the research park, to promote the safety of the food supply for both developed and developing countries. By locating a non-federally-owned training lab adjacent to the FDA, the IFSTL allows FDA scientists to help train international food safety professionals in a university-managed facility, supplied with the latest lab equipment provided by the private sector. But for this research park partnership, the FDA could not effectively address the issue of training for international food safety professionals. This partnership helps to solve a critical issue for consumers worldwide by leveraging a federal facility in the research park, and it provides economic benefit to Maryland airports, hotels and restaurants through the attraction

of food-safety scientists from developing countries to the state for training modules. The importance of another example

“Universities have enormous capabilities and purchasing power, particularly because they are often able to issue bonds.”

— Cameron McCoy, executive director, corporate engagement office, University of Oklahoma Research Campus

is illustrated in recent headlines. The National Weather Service has been an active presence on the campus of the University of Oklahoma for decades, but after the terribly destructive tornadoes of 1999, representatives from the agency and the university convinced then-president Bill Clinton to authorize federal funding to create what is now called the Storm Prediction Center. The SPC is housed within the OU Research Campus, which has grown to incorporate more than 1

million square feet of office space. The SPC and related agencies employ some five hundred people, while the University of Oklahoma has emerged as one of the premier schools of meteorology in the nation, with more than five hundred students in graduate and undergraduate programs. The SPC could not be in a better location, given that the Oklahoma City metroplex is in the heart of what has been called “Tornado Alley.” It has also emerged, like the larger research park in which it is housed, as an important economic engine for that community.

Communities of Innovation

University research parks form communities of their own — what we know as communities of innovation. Those communities occupy real physical space, or real estate. Most parks are sited on land that has been improved and is ready for development, thus enabling compa-

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nies looking for a new location to save significant entitlement and infrastructure preparation time. Parks often have existing buildings that are available for lease. The land and the space in a university research park offer something that is not available anywhere else: the university-industry connection. The park community of researchers, students and industry colleagues propel companies to progress through growth phases much more quickly. The environment of innovation and speedy implementation is the true engine of economic growth.

The University of Oklahoma Research Campus, for instance, began life at a former Naval Air Station that was decommissioned after World War II. After the University acquired its 277 acres, it developed a world-class campus for research and innovation.

“Universities have enormous capabilities and purchasing power, particularly because they are often able to issue bonds,” says Cameron McCoy, executive director of the UORC’s Corporate Engagement Office. “OU now has more than \$300 million invested in the Research Campus, and mini-clusters of research-based industries such as genomics, chemistry, health sciences and nanosciences have grown to form centers of gravity.” These cells allow the campus to grow organically, with old assets building on new ones.

Similarly, Baylor University’s Research and Innovation Collaborative (BRIC) is structured to foster and encourage interdisciplinary research. With a facility that is conveniently located near all modes of commercial land-based and airborne

transport, BRIC provides researchers, industry/business clients, and area institutions and organizations with over 300,000 square feet of functional space appointed for laboratories, prototyping and testing, offices and workspace, work-force training and meetings. The BRIC facility, funded by private and public sources, opened only this year, with full occupancy expected in 2016.

The first groups of Baylor researchers slated to occupy the BRIC have begun moving into their new laboratories and offices, among them electrical and mechanical engineering researchers and the staff

One thorny problem is **technology transfer** and the ownership of intellectual property.

of the Center for Spatial Research and Center for Astrophysics, Space Physics, and Engineering Research (CASPER).

In short, university research parks work closely with regional economic development partners to leverage the comparative advantages of their home universities and their regional assets. “We have found ourselves acting almost as the Chamber of Commerce traditionally does in local communities,” says McCoy. “We are entrepreneurs working toward the economic development of the entire region.” Fifteen private companies now make their homes at the OU Research Campus, accounting for more than 750 jobs.

Challenge: To Expedite Tech Transfer

University research parks face many

challenges, and not just those associated with an economy that seems slow to emerge from downturn. One thorny problem is technology transfer and the ownership of intellectual property.

“We are working on policies to expedite the commercialization of technology and the development of companies by students, both undergraduate and graduate, to create businesses that will be career paths for them on graduation day,” notes Charles F. D’Agostino, executive director of the Louisiana Business & Technology Center at Louisiana State University’s 250-acre Innovation Park. One successful program, called Access LSU, contains a community-outreach program that enables community members to ask for and receive assistance from university researchers and faculty as well as placing student interns and fostering contract research through university labs.

Another challenge is to remain competitive at a time when funding of academic science and engineering research and development has failed to outpace inflation, as the National Science Foundation reports, and when R&D investments generally have fallen dramatically over the last few years. The government of China, has established a multiyear framework to become more innovative — and, therefore, even more competitive than it already is. Singapore has become an incubator of new products and technologies, while Finland has merged its top business school, design school and technology school to create a multidisciplinary “university of innovation.”

University research, science and tech parks are important tools not only for creating and maintaining employment in today’s high technology sectors, but also as the places where discoveries happen and where the economy of the future will be born. ▼

Eileen Walker is chief executive officer of the Association of University Research Parks. Her email is eileen-walker@aurp.net.



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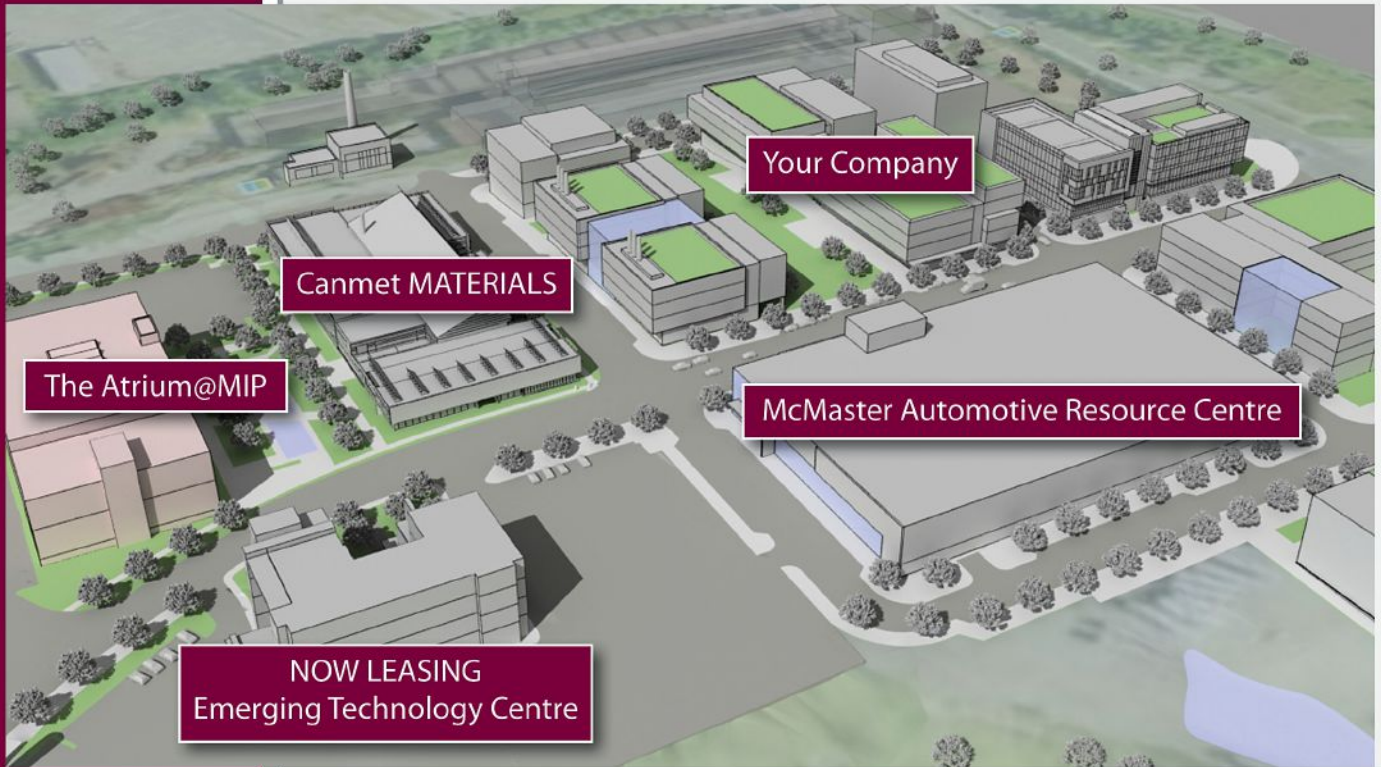
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Thorough treatment of global technology centers would be incomplete without a directory of research and science parks to keep on hand. Therefore, Site Selection is pleased to present a directory of university research and science parks, courtesy of the Association of University Research Parks (AURP). These parks play critical roles in bringing together academia, private-sector investors and local economic developers to turn science into industry and research into job creation. Site Selection values its collaboration with AURP (www.aurp.net). — Editor

UNITED STATES

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Auburn Research & Technology Foundation
Dr. John Weete

(334) 844-4977
weetejd@auburn.edu
www.auburn.edu

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Mr. John Southerland

(256) 535-2086
jsoutherland@hsvchamber.org
www.huntsvillealabamusa.com

Tuscaloosa Research Park
Mr. Daniel Daly, Dir.

(205) 348-3502
dandaly@ua.edu

Tuskegee University
Dr. Gilbert L. Rochon

(334) 727-8501
rochon@mytu.tuskegee.edu
www.tuskegee.edu

University of South Alabama Research & Technology Park

Mr. W. Ker Ferguson
(251) 460-6384
wkferguson@usouthal.edu
www.southalabama.edu/usatrp

ARIZONA

Arizona State University Research Park

Ms. Heidi Kimball
(480) 752-2016
jpage@asu.edu
www.asuresearchpark.com

University of Arizona Science & Technology Park

Mr. Bruce A. Wright
(520) 626-4843
wrightb@u.arizona.edu
www.uatechpark.org

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Arkansas Research & Technology Park

Mr. Phillip Stafford
(479) 575-8411
psstaff@uark.edu
www.uark.edu/ua/artp

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Mrs. Sandra Vaughan-Acton
(909) 869-3154
vaughanacton@csupomona.edu
www.foundation.csupomona.edu/iv

California Polytechnic State University

San Luis Obispo – C3RP
Mr. James Dunning
(805) 756-5551
jdunning@calpoly.edu
www.c3rp.org

Lawrence Berkeley National Laboratory

Dr. Horst D. Simon
(510) 486-6100
HDSimon@lbl.gov
www.lbl.gov

Lawrence Livermore National Laboratory

Mr. James F. Koonce
(925) 422-2698
koonce1@llnl.gov
www.llnl.gov

NASA Research Park at NASA Ames Research Center

Mr. Michael Marlaire
(650) 604-2NRP
arc-dl-researchpark@mail.nasa.gov
researchpark.arc.nasa.gov

San Jose State University Research Foundation

Ms. Mary Sidney
(408) 924-1403
msidney@foundation.sjsu.edu
www.sjsufoundation.org

Stanford University

Ms. Tiffany Griego
(650) 926-0308
tgriego@stanford.edu
www.lbre.stanford.edu/realestate/research_park

University of California – San Diego Science Research Park

Dr. Nancy E. Kossan
(858) 534-1488
nkossan@ucsd.edu
www.srp.ucsd.edu

University of California, Santa Cruz – UC MBEST Center

Mr. Bruce Margon
(831) 459-1596
www.ucmbest.org

University Research Park at University of California – Irvine

Mr. Tom Greubel
(949) 720-2255
www.research.uci.edu/urp

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Ms. Laurie Stone
(323) 442-1337
lmstone@usc.edu

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Ms. Vicki Jenings
(720) 859-4108
vjenings@colobio.com
www.FitzScience.com

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Mr. Tim Bour
(303) 444-2111
Tim@innovationcenteroftherockies.com
www.innovationcenteroftherockies.com

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University of Connecticut Technology Park

Ms. Rita Zangari
(860) 486-3010
rita.zangari@uconn.edu
www.innovation.uconn.edu/UCConn_Technology_Park

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Mr. Michael Bowman
(302) 452-1100
mike.bowman@deltechpark.org
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Mr. Joe Wallace
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www.cfrp.org

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Ms. Mary Dyer
(321) 914-0742
mdyer@fit.edu
www.fit.edu

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Mr. Ron Miller
(850) 575-0343
rmiller@inn-park.com
www.innovation-park.com

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Mr. Andrew Duffell
(561) 416-6092
aduffell@research-park.org
www.research-park.org

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Mr. Ben DeVries
(772) 467-3107
CEO@tcerda.org
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Mr. William D. Hunter
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whunter@wexfordequities.com
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Ms. Allison Madden
(813) 974-5095
amadden@usf.edu
www.research.usf.edu

GEORGIA

Georgia State University
Dr. James Weyhenmeyer
(404) 413-3517
weyhenmeyer@gsu.edu
www.gsu.edu

Technology Enterprise Park at Georgia Institute of Technology
Ms. Lisa Sills
(404) 407-8957
lisa.sills@gtri.gatech.edu
www.technologyenterprisepark.com/home.html

The University Financing Foundation, Inc.
Mr. Kevin T. Byrne
(404) 214-9210
kevin.byrne@tuff.org
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Maui Research & Technology Park
Mr. Steve Perkins
(808) 270-5944
stevep@pacificrimland.com
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Mr. Charles Buck
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Richland Agribusiness Applied Technology Park
Dr. Douglas Brauer
(217) 875-7211, ext. 745
dbrauer@richland.edu
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Dr. Kyle Harfst
(618) 453-3427
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(785) 532-3900
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www.nistac.org

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Ms. Vickie Yates Brown
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(504) 593-6442
jamesp@biodistrictneworleans.org
www.biodistrictneworleans.org

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Mr. Craig Spohn
(866) 380-2746
craig.spohn@cyberinnovationcenter.org

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Dr. Dave Norris
(318) 257-3978
dnorris@latech.edu
www.latech.enterprise.edu

Intertech Science Park/ Biomedical Research Foundation of NW Louisiana
Mr. John F. Sharp
(318) 213-0208
jsharp@biomed.org
www.intertechsciencepark.org

Louisiana State University Innovation Park
Mr. Charles D'Agostino
(225) 578-7555
cdag@lsu.edu
www.bus.lsu.edu/lbtc

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Dr. Robert R. Twilley
(337) 482-6541
rtwilley@louisiana.edu
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University of New Orleans Research & Technology Park
Dr. Steven Johnson
(504) 280-6321
vpresearch@uno.edu
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bwtech@UMBC Research & Technology Park
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sanjay.raim@montgomerycollege.edu
www.montgomerycollege.org

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www.riversideresearchpark.com

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(240) 777-2018
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(301) 405-1990
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Joseph.Mcmanus@Tufts.edu
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(617) 914-2508
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mmanning@wpi.edu
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david.spencer2025@gmail.com

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bob.miller@wmich.edu
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 (716) 881-7480
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 www.bnmc.org

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Ms. Eva Cramer
 (718) 270-1011
 ecramer@downstate.edu
 www.incubator.downstate.edu/Incubator.htm

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 (917) 270-9813
 michael_archer@manhattaninnovationlab.com
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Mr. Jerry Hultin
 (718) 260-3500
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 www.poly.edu

Rensselaer Technology Park
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 amscheidt@notes.cc.sunysb.edu
 www.stonybrook.edu

Syracuse University
Dr. Louis G. Marcoccia
 (315) 443-3037
 lmarcocc@syr.edu
 www.syr.edu

University at Buffalo Baird Research Park
Mr. Woody Maggard
 (716) 645-5500, ext. 26
 wmaggard@buffalo.edu
 www.buffalo.edu

NORTH CAROLINA

Centennial Campus
Mr. Dennis H. Kekas
 (919) 515-8810
 kekass@ncsu.edu
 www.centennial.ncsu.edu

Charlotte Research Institute
Dr. Robert G. Wilhelm
 (704) 687-8428
 rgwilhel@uncc.edu
 www.uncc.edu

Gateway University Research Park
Mr. John R. Merrill
 (336) 375-9232
 johnm@gatewayurp.com
 www.gatewayurp.com

North Carolina Research Campus
Mr. Clyde Higgs
 (704) 273-1204
 chiggs@castlecooke.com
 www.ncresearchcampus.net

The Research Triangle Park
Mr. Robert T. Geolas
 (919) 549-8181
 Geolas@rtp.org
 www.rtp.org

Wake Forest Innovation Quarter
Dr. Eric Tomlinson
 (336) 716-8672
 etomlins@wakehealth.edu
 www.wakeforestinnovations.org

NORTH DAKOTA

North Dakota State University Research & Technology Park
Ms. Brenda Wyland
 (701) 499-3603
 brenda@ndsuresearchpark.com
 www.ndsuresearchpark.com

University of North Dakota Center for Innovation
Mr. Bruce Gjovig
 (701) 777-3132
 bruce@innovators.net
 www.utechpark.net

OHIO

BioHio Research Park – Ohio State University
Dr. Shauna R. Brummet
 (330) 263-3716
 brummet.1@osu.edu
 www.BioHioResearchPark.org

Case Western Reserve University
Mr. Mark Cotichia
 (216) 368-3577
 rjb9@case.edu
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Global Cardiovascular Innovation Center
Ms. Susan Bernat
 (216) 445-5610
 bernats@ccf.org
 www.clevelandclinic.org/innovations/gcic.html

Miami Valley Research Park (MVRP)
Mr. Bruce E. Pearson
 (937) 252-5906
 bruce@theresearchpark.com
 www.theresearchpark.com

Russ Research Center
Dr. Shawn Ostermann
 (740) 593-1482
 ostermann@ohio.edu
 www.russresearchcenter.com

Science & Technology Campus Corporation (SciTech)
Mr. Doug Aschenbach
 (614) 675-4100
 aschenbach.3@osu.edu
 www.stcc.org

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www.utfoundation.org

OKLAHOMA

**Oklahoma State
University – Tulsa**
Dr. Ron Bussert
(918) 594-8004
ron.bussert@okstate.edu

**Presbyterian Health
Foundation Research Park**
Mr. JR Caton
(405) 319-8161
jrcaton@phfresearchpark.com
www.phfresearchpark.com

**University Research Campus –
University of Oklahoma**
Mr. Cameron McCoy
(405) 325-4625
cmccoy@ou.edu
www.ceo.ou.edu

PENNSYLVANIA

Carnegie Mellon University
Mr. Ralph R. Horgan
(412) 268-7280
rh44@andrew.cmu.edu
www.cmu.edu

**East Stroudsburg University of
Pennsylvania Research &
Business Park**
Ms. Mary Frances Postupack
(570) 422-7920
mpostupack@po-box.esu.edu
www.esu.edu

**Hershey Center for Applied
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Mr. Jack Atchason
(717) 566-8900
jatchason@hersheyresearch.com
www.hersheyresearch.com

Innovation Park at Penn State
Mr. Daniel R. Leri
(814) 865-5925
danleri@psu.edu
www.innovationpark.
psu.edu

**The University City
Science Center**
Mr. Curtis Michael Hess
(215) 966-6275
chess@sciencecenter.org
www.sciencecenter.org

SOUTH CAROLINA

**Clemson University –
International Center for
Automotive Research
(CU-ICAR)**
Mr. Frederick M. Cartwright
(864) 283-7102
fcartwr@clemson.edu
www.cuicar.com

**University of South Carolina/
Innovista Partnerships**
Mr. Don Herriott
(803) 777-0066
herriott@sc.edu
www.innovista.sc.edu

SOUTH DAKOTA

**South Dakota State
University Innovation Campus**
Mr. Dwaine Chapel
(605) 696-5600
Dwaine@researchparkatsdstate.com
www.researchparkat
sdstate.com

**South Dakota Technology
Business Center**
Mr. Rich Naser
(605) 275-8010
richn@sdtbc.com
www.sdtbc.com

TENNESSEE

**Cherokee Farm
Innovation Campus**
Mr. David Millhorn
(865) 974-4048
millhorn@tennessee.edu
www.tennessee.edu/system/
cherokee

**Oak Ridge National
Laboratory**
Mr. Thomas Rogers
(865) 241-2149
rogerstc@ornl.gov

TEXAS

Baylor University
Dr. Truell Hyde
(254) 710-3763
truell_hyde@baylor.edu
www.baylor.edu/research

**BioCenter at Southwestern
Medical District**
Mr. Frank Grassler
(214) 648-1880
frank.grassler@utsouthwestern.edu
www.biocenterdallas.com

Reese Technology Center
Mr. Bill Miller
(806) 885-6592
bmiller@reesecenter.com
reesetechnologycenter.com

**Research & Innovation Park
at Sam Houston State
University**
Mr. Al G. Hooten
(936) 294-1018
agh010@shsu.edu
www.shsu.edu

**STAR Park-Texas State
University – San Marcos**
Mr. Stephen Frayser
(512) 245-6434
s_f75@txstate.edu
www.txstate.edu/starpark

**Texas A&M University
Research Park**
Mr. Jason Whisenant
(979) 862-1769
jwhisenant@tamu.edu
www.researchpark.tamu.edu

**Texas Research &
Technology Foundation**
Mr. York Duncan
(210) 674-4177
yduncan@trpf.com
www.trpf.com

**The Research Park at
Texas Tech University**
Mr. Jesse K. Pruitt
(972) 661-6300
jesse@jessepruitt.com

**University of Houston
Energy Research Park**
Mr. Sean York
(713) 743-3326
sryork@uh.edu
www.uh.edu/erp

**University of North Texas
Discovery Park**
Mr. Harold Strong
(940) 565-4459
harold.strong@unt.edu
www.unt.edu

UTAH

**Utah State University
Innovation Campus**
Mr. Robert Behunin
(435) 797-9610
robert.behunin@usu.edu
www.innovation
campus.usu.edu

**University of Utah
Research Park**
Mr. Jonathon Bates
(801) 581-8133
vp.admin.utah.edu/research

VIRGINIA

**Innovation Research Park at
Old Dominion University**
Mr. Thomas Osha
(757) 353-5737
tosha@odu.edu
www.irpodu.com

Innovation Technology Park
Ms. Martha A. Schoonmaker
(703) 792-5191
mschoonmaker@pwcgov.org
www.pwcecondev.org

**Mason Innovation @
PWC Research &
Development Park**
Mr. Roger Stough
(703) 993-2268
rstough@gmu.edu
www.research.gmu.edu

**Stafford Research &
Technology Park**
Mr. Rick Cobert
(540) 658-8681
rcobert@staffordcountyva.gov
www.gostaffordva.com

**University of Virginia
Foundation**
Ms. Deborah van Eersel
(434) 924-0696
dv5q@virginia.edu
www.uvafoundation.com

**Virginia Biotechnology
Research Park**
Mr. Robert Skunda
(804) 828-5390
rts@vabiotech.com
www.vabiotech.com

**Virginia Tech Corporate
Research Center**
Dr. Joe W. Meredith
(540) 961-3600 ext. 2103
joe.meredith@vtcrc.com
www.vtcrc.com

WASHINGTON

Tri-Cities Research District
Ms. Diahann Howard
(509) 375-3060
dhoward@portofbenton.com
www.tricitieresearch
district.org

WEST VIRGINIA

**West Virginia Regional
Technology Park Corporation**
Ms. Kristie Brown
(304) 356-3167
kristie.brown@wvtrp.com
www.wvtechnology
park.com

**West Virginia University
Research & Econ. Dev.**
Mr. Fred King
(304) 293-3449
fred.king@mail.wvu.edu
www.wvu.edu/~research

WISCONSIN

**Innovation Park, University of
Wisconsin-Milwaukee**
Mr. Curt Stang
(414) 906-4645
cstang@uwmfdn.org
www.uwmrealestate
foundation.org

**University of Wisconsin
Stout Technology Park**
Mr. Christopher Smith
(715) 232-2488
smithch@uwstout.edu
www.uwstout.edu/stp

**University Research Park,
University of Wisconsin –
Madison**
Mr. Greg Hyer
(608) 441-8020
grhyer@wisc.edu
www.university
researchpark.org

**Whitewater University
Technology Park**
Mr. Ronald L. Gayhart
(262) 472-1365
outreach1@uww.edu
www.whitewater
techpark.org

PUERTO RICO

**Puerto Rico Science,
Technology & Research Trust**
Mr. Eric Cornavaca
ecornavaca@prsciencetrust.org
www.prsciencetrust.org

INTERNATIONAL

VIRGIN ISLANDS

University of the Virgin Islands Research & Technology Park
Mr. David M. Zumwalt
(340) 692-4200
dzumwalt@uvirtpark.com
www.uvirtpark.com

CANADA

Calgary Technologies Inc.
Mr. Dave MacKillop
(403) 284-6422
dmackillop@innovatecalgary.com
www.ucalgary.ca

Edmonton Research Park
Ms. Jenni Salonga
(780) 409-0454
jsalonga@edmonton.com
www.edmonton.com/researchpark

Discovery Parks
Mr. Mark Betteridge
(604) 734-7275
markbetteridge@discoveryparks.com
www.discoveryparks.com

Great Northern Way Campus
Mr. Matthew Carter
(778) 370-1002
matthew_carter@gnwc.ca
www.gnwc.ca

Vancouver Island Technology Park
Ms. Bonny Brewer
(250) 483-3203
bbrewer@vitp.ca
www.vitp.ca

SmartPark at University of Manitoba
Mr. Alan Simms
(204) 474-8758
alan_simms@umanitoba.ca
www.umanitoba.ca/research/smartpark

Knowledge Park Inc.
Mr. Larry Shaw
(506) 462-5021
larry.shaw@knowledgepark.ca
www.knowledgepark.ca

Perennia
Ms. K. Laurie Sandeson
(902) 896-7270
sandesk@gov.ns.ca
www.perennia.ca

Bio-Sciences & Technology Convergence Centre
Ms. Helen Gillespie
(705) 942-7927, ext. 3121
hgillespie@ssmic.com

David Johnston Research + Technology Park University of Waterloo
Ms. Carol A. Stewart
(519) 888-4567, ext. 36339
castewar@uwaterloo.ca
www.rtpark.uwaterloo.ca

Innovation Park at Queen's University
Ms. Janice Mady
(613) 533-3371
madyj@queensu.ca
www.innovationpark.ca

MaRS Discovery District
Mr. Randal Froebelius
rfoebelius@marsdd.com
www.marsdd.com

McMaster Innovation Park
Mr. Zach Douglas
(905) 667-5502
zdouglas@mcmaster.com
innovationpark.ca
www.mcmasterinnovationpark.ca

Sunnybrook Health Science Center
Mr. Leslie Boehm
(416) 480-5720
leslie.boehm@sunnybrook.ca
www.sunnybrook.ca

University of Guelph
Mr. Philip Wong
(519) 767-5013
pwong@uoguelph.ca
www.uoguelph.ca

University of Western Ontario Research Park
Mr. Paul Paolatto
(519) 850-2307
ppaolat@uwo.ca
www.researchpark.ca

Bromont Scientific Park
Mr. Jacques Des Ormeaux
(450) 534-2021
direction.generale@bromont.com
www.parcscientifiquebromont.com

City of Agri-Food, Veterinary & Agroenvironment Biotechnology
Mr. Mario De Tilly
(450) 773-4232, ext. 225
detillym@cld-cite.qc.ca
www.st-hyacinthe-technopole.qc.ca

Developpement Economique Longueuil
Ms. Manuela Franco
(450) 645-0972
manuela.franco@del.longueuil.ca
www.del.longueuil.ca

Laval Technopole
Mr. Pierre Desroches
(450) 978-5959
pierre.desroches@lavaltechnopole.com
www.lavaltechnopole.com

Parc Biomedical de Sherbrooke
Mr. Pierre Quirion
(819) 340-3141
pq@biomed.ca
www.biomed.ca

Technopole de la Region de Theftord
Ms. Genevieve Bolduc
(418) 338-2188
gbolduc@technopoletheford.ca
www.technopoletheford.ca

Technopole Maritime du Quebec
Mr. Laurent Bellavance
(418) 724-9616
techmar@tmq.ca
www.tmq.ca

Varenes Developpement
Ms. Caroline Gagnon
(450) 652-9888, ext. 460
caroline.gagnon@ville.varenes.qc.ca
www.ville.varenes.qc.ca

Innovation Place
Mr. Ken Loeppky
(306) 787-5706
kloeppky@innovationplace.com
www.innovationplace.com

Technoparc Montreal
Ms. Lidia Divry
(514) 956-2536
ldivry@technoparc.com
www.technoparc.com

COLOMBIA

Eco-Technology Park of Usme
Dr. Marta Losada, President
+57 (1) 315-2973
rector@uan.edu.co

Parque Tecnologico Carlos Velez Pombo
Dr. Paola Amar Sepulveda
pamar@unitecnologica.edu.co
unitecnologica.edu.co

JAPAN

Kyoto Research Park
Mr. Toshiharu Moriuchi
+81 (75) 315-8288
gateway@krcp.co.jp
www.krcp.co.jp/english/index.html

MALAYSIA

Innovation & Commercialisation Centre – UTM Technovation Park
Dr. Azhar Aziz
azharaz@icc.utm.my
www.icc.utm.my

Malaysian Bio-XCell Sdn Bhd
Ms. Juanita Joseph
+603 (2) 116-5588
juanita.joseph@biotechcorp.com.my
www.biotechcorp.com.my

MEXICO

BioHelis – Parque de Innovacion Tecnologica de CIBNOR
Dr. Humberto Villarreal Colmenares
+52 (612) 123-8484, ext. 3493
humberto04@cibnor.mx
www.cibnor.gob.mx/biohelis

Parque de Innovacion y Transferencia de Tecnologia (PIT2)
Dr. Antonio Rios Ramirez
+011 (52) 614 439 50 00, ext. 5504
antonio.rios@itesm.mx
www.pit-2.com/portada/#/home

PIIT/Instituto de Innovacion y Transferencia de Tecnologia
Mr. Jaime Parada-Avila
+52 (81) 2033-1102
jaime.parada@mtycic.org
www.mtycic.org

NICARAGUA

Parque Tecnologico Julio Padilla Mendez
Mr. Marcelino Castro Baltodano
(505) 224-44257
marcelino.castro@uni.edu.ni
www.uni.edu.ni

PANAMA

City of Knowledge – Int'l. Technopark of Panama
Mr. Ricardo Endara
+011 (507) 317-0111
rendara@cdspanama.org
www.cdspanama.org

SAUDI ARABIA

KAUST Research Park
Mr. Serry Bakarman, Dir., Research Park & Industry Collaboration
966-2808-2801
serry.bakarman@kaust.edu.sa
www.kaust.edu.sa

Dhahran Techno-Valley
Dr. Halim Hamid Redhwi
+96 (63) 860-3810
hhamid@kfupm.edu.sa
www.kfupm.edu.sa/dtv

Riyadh Techno Valley
Mr. Nawaf Alsharif
+966 (1) 469-6377
alsharif@rtv.com.sa
www.rtv.com.sa

SPAIN

Bilbao Technology Park
Mr. Jose Miguel Corres
+34 (94) 403-9500
presidencia@rpte.net
www.parque-tecnologico.net

TAIWAN

Central Taiwan Science Park Administration
Mr. Wen-Ke Yang
+886-4-25658588, ext. 1113
lieco@ctsp.gov.tw
www.ctsp.gov.tw/english

Hsinchu Science Park
Mr. Randy Tzong-Ming Yen
yen@sipa.gov.tw
www.sipa.gov.tw

Southern Taiwan Science Park
Mr. Chun-Wei Chen
+88 (66) 505-1001, ext. 2133
naichih@ststipa.gov.tw
www.ststipa.gov.tw/web

UNITED ARAB EMIRATES

Amer. Univers. of Sharjah
Dr. Olin McDaniel
97165152191
cmcdaniel@aus.edu



All Inclusive

How areas of innovation are challenging and changing the model for research and science parks.

Call it what you will — a science park, a research park, a technology park, or a technopole. Over the last half-century, these types of developments have become recognized globally for offering a variety of support services to knowledge-based companies and for making significant contributions to regional economies.

In fact, many have come to view science parks as a type of “silver bullet” with the capability of dramatically improving a region or community’s ability to compete in the global technology and innovation economy. The reality, however, is far more complex.

As the president of the International Association of Science Parks and Areas of Innovation (IASP), I have the privilege of leading an organization that is at the forefront of this rapidly evolving movement. Originally founded in 1984, IASP has experienced tremendous growth and today represents almost 400 members in 70 countries. More importantly, IASP member parks contain 128,000 technology oriented and highly innovative companies. Indeed, much of the world’s technology commercialization activities are concen-

by **RICK WEDDLE**
editor@siteselection.com

trated in or affiliated with IASP member parks.

It is through such growth and development that science parks continue to fulfill their most basic role of catalyzing economic change and progress. Science parks serve to concentrate a region or

community’s knowledge assets, connect the elements of government, academia and business together, establish the place’s unique market differentiator and, importantly, create a variety of space options for innovation.

Over time, we’ve seen the needs of regions, communities, companies and employees evolve and change. Deep shifts in the global economy, science and technology and models of innovation are challeng-



The University of Central Florida College of Medicine in Orlando, Fla., is the anchor for Lake Nona Medical City, a \$2-billion investment in the life sciences industry.

IASP member parks contain 128,000 technology oriented and highly innovative companies.

ing the model of self-contained research parks. Macro trends like the emergence of the group economy, ecological economics, biology by design, ubiquitous computing and big data, hybrid sensemaking and amateur science are transforming our academic and scientific institutions. A new global map of science is emerging where a whole new regime of universities are transitioning from “ivory towers” to major economic engines.

These and other tectonic shifts are changing the way we work, think and live. They’re changing the way we organize companies and the way companies connect, compete, collaborate and co-locate or aggregate into economic clusters. In our regional economies we’re seeing a shift from thinking of research or science parks as a key driver of innovation to the realization that something larger and more inclusive is what matters. We’re beginning to think in terms of regional knowledge ecosystems and the myriad of dynamic interactions and players, including science parks, that combine to create, nurture and launch scientific discovery and innovation.

New Shapes

At IASP, we recognize these new phenomena as the emergence and evolution of “areas of innovation.” These new areas are evolving and happening in Thailand at Amata Science City, in Brazil at Porto Digital, in China at Zhongguancun Science Park, in Tunisia at Sfax Technopark, in Spain at 22@Barcelona and in Germany at Berlin Adlershof. They’re happening in the U.S.A. in places like Austin, Texas, where the entire city focuses on innovation and creativity, in Michigan where Ann Arbor Spark is reinventing the local economy, and in Orlando, Fla., where a true next-generation innovation ecosystem is being anchored by the Central Florida Research Park, Lake Nona Medical City, Florida Hospital Health Village, Orlando Creative Village and a fully integrated network of a dozen University of Central Florida incubators.

Fifty years ago, we began forming



22@Barcelona, Spain, is a key example of an area of innovation, having transformed 200 hectares (494 acres) of industrial land into an innovative district offering modern spaces for the strategic concentration of intensive knowledge-based activities.

research and science parks as a tool for creating jobs and economic growth. Today these parks and the innovations and related activities that have emerged are folding into emerging knowledge ecosystems and areas of innovation. They are reshaping their communities and regions in ways we could never have predicted.

IASP and its members are fully embracing this process. That’s why the theme for the upcoming 30th IASP World Conference to be held in Recife, Brazil, in October, is “Science Parks Shaping New Cities.” The Recife conference will showcase Porto Digital, one of the mainstays of the State of Pernambuco’s new economy. With its focus on software, ICT and the creative economy, Porto Digital has become a major center for gaming, multimedia, cinema, video, animation, music, design and photography. More than a thousand innovation thought leaders will gather in Recife to explore the conference theme and see firsthand the science park and area of innovation concept at work.

In Recife, as in Orlando and other cities around the world, the mission of IASP remains the same: To be the global network for science parks and areas of innovation and to drive growth, internationalization and effectiveness for our members. The pursuit of this mission over the last 25 years has led to significant accomplishments for the association and its global network of members. Most importantly, however, it has helped make the world a better and more prosperous place. ▼



Rick L. Weddle, president and CEO of the Metro Orlando Economic Development Commission, is the first American to serve as president of the International Association of Science Parks and Areas of Innovation (www.iasp.ws).

Directory of Science Parks

IASP is the worldwide network of science parks and areas of innovation, connecting nearly 400 members in 70 countries and representing more than 128,000 high-tech companies. Our members enhance the competitiveness of companies and entrepreneurs of their cities and regions, and contribute to global economic development through innovation, entrepreneurship, and the transfer of knowledge and technology.

IASP members: a world of opportunities for companies looking for the best locations.

ARGENTINA

Fundación Parque Tecnológico Misiones
Dr. Carlos Emilio Galián
+54 376 448 1087
incutemi@ptmi.org.ar
www.ptmi.org.ar

Universidad Nacional de San Martín
Mr. Esteban Cassin
+54 114 580 7250
ceid.unsam@gmail.com
www.unsam.edu.ar

AUSTRALIA

Brisbane Technology Park
Ms. Gill Laird-Portch
+61 7 3188 9000
gill@zernikeaustralia.com.au
www.zernikeaustralia.com.au

Innovation Campus – University of Wollongong
Mr. David Campbell
+61 242 215 115
dfuller@uow.edu.au
www.innovationcampus.com.au

Investec Bank (Australia) Limited
Mr. Nigel Brophy
+61 3 8660 1047
tammy.mcleod@investec.com.au
www.investec.com.au

Technology Parks Australia & New Zealand
Mr. David Fuller
+61 4221 3851
david_fuller@uow.edu.au
www.tpanz.org

AUSTRIA

Lakeside Science & Technology Park
Mr. Hans Schönegger
+43 463 22 88 22 0
info@lakeside-scitec.com
www.lakeside-scitec.com

Softwarepark Hagenberg
Prof. Bruno Buchberger
office@softwarepark-hagenberg.com
www.softwarepark-hagenberg.com

Tech Gate Vienna Science & Technology Park
Mr. Michael Kolpek
+43 1 20501 110
office@techgate.at
www.techgate.at

Techno-Z Network Company – The Salzburg Enterprise Network
Mag. Werner Pfeiffenberger
+43 662 454 888
office@techno-z.at
www.techno-z.at

BELGIUM

CREALYS® – Science Park of the Province of Namur
Mrs. Stéphanie Bonmariage
+32 81 728827
sbo@bep.be
www.crealys.be

Interface Entreprises – Université de Liège
Mrs. Fabienne Hocquet
+32 4 349 8532
interface@ulg.ac.be
www.interface.ulg.ac.be

Louvain-la-Neuve Science Park (UCL)
Ms. Magdalini Ioannidis
+32 10 47 91 34
info-parc@uclouvain.be
www.uclouvain.be/parc

SPoW – Science Parks of Wallonia
Mr. Philippe Barras
+32 1047 9134
info@spow.be
www.spow.be

Wallonia Foreign Trade & Investment Agency (AWEX)
Mr. André Marsden
+32 81 33 28 73
info@investinwallonia.be
www.investinwallonia.be

BOTSWANA

Botswana Innovation Hub
Mr. Alan Boshwaan
+267 391 3328
btacheba@yahoo.co.uk
www.bih.co.bw

Measurement Technology Park (Pty)
Dr. Roy Morenei Ontiretse
+267 310 5242
info@mtpbotswana.com
www.mtpbotswana.com

BRAZIL

ANPROTEC – Brazilian Association of Technology Parks & Business Incubators
Ms. Francilene Garcia

+55 61 3202 1555
anprotec@anprotec.org.br
www.anprotec.org.br

Antonio Luis Aulicino
+55 11 350 70578
alaulicino@idsust.com.br
www.idsust.com.br

Belo Horizonte Science & Technology Park – BH-TEC
Mr. Mauro Borges Lemos
+55 (31) 3401 1000
contato@bhtec.org.br
www.bhtec.org.br

Center for Innovation, Entrepreneurism & Technology – Cietec
Mr. Claudio Rodrigues
+55 11 3039 8300
sergio@cietec.org.br
www.cietec.org.br

Fundação PTI – Parque Tecnológico Itaipu
Mr. Juan Carlos Sotuyo
+55 045 3520 6169
sotuyo@pti.org.br
www.pti.org.br

Guama Science & Technology Park – STP Guama
Dr. Antonio Abelem
+55 91 3321 8900
fundacaoguama@fundacaoguama.org.br
www.pctguama.org.br

Parque Tecnológico de Sorocaba
Mr. Carlos Alberto Costa
+55 1 532 379 080
contato@empts.com.br
www.empts.com.br

Parque Tecnológico do Rio/UFRJ
Mr. Mauricio Guedes Pereira
+55 21 25903428
mauricio@parque.ufrj.br
www.parquedorio.ufrj.br

Parque Tecnológico – São José Dos Campos
Mr. Horacio Aragones Forjaz
+55 (12) 3878 9500
haforjaz@pqtec.org.br
www.pqtec.org.br

PCTec – UnB
Prof. Luís Afonso Bermúdez
+55 61 3347 0617
cdt@cdt.unb.br
www.cdt.unb.br

Porto Digital
Mr. Francisco Saboya

+55 81 3419 8013
saboya@portodigital.org
www.portodigital.org

PUCPR TECNOPARQUE – Pontifícia Universidade Católica Do Paraná
Mr. Luiz Márcio Spinosa
+55 41 3271 1844
agenciapuc@pucpr.br
www.agenciapuc.pucpr.br

Sapiens Parque, S.A.
Mr. José Eduardo Azevedo Fiates
+55 1 48 3239 2150
sapiens@sapiensparque.com.br
www.sapiensparque.com.br

Tecnoparq – Parque Tecnológico de Viçosa (CenTev/UFV)
Ms. Delaine Cristina Lamb
+55 31 3899 3133/3134
centev@ufv.br
www.centev.ufv.br

TECNO PUC – Parque Científico e Tecnológico da Pontifícia Universidade Católica do Rio Grande do Sul
Prof. Jorge Audy
+55 513 320 3694
tecnopuc@puers.br
www.pucrs.br/agt/tecnopuc/index.htm

Universidade Federal de Itajubá
Prof. Renato Nunes
+55 35 3629 1101
reitoria@unifei.edu.br
www.unifei.edu.br

Universidade Federal de Juiz de Fora – UFJF
Mr. Paulo Garcia
55 32 2102 3435
com.critt@ufjf.edu.br
www.ufjf.br/critt

Universidade Federal do Rio Grande do Sul
Prof. Flávio Rech Wagner
+55 51 3308 3800
sedetec@ufrgs.br
www.sedetec.ufrgs.br

CANADA

David Johnston Research & Technology Park – University of Waterloo
Ms. Carol Stewart
+1 11 519 888 4567
castewar@uwaterloo.ca

Innovation Park
Mr. Renald Mercier
+1 819 821 8000
renald.mercier@usherbrooke.ca
www.usherbrooke.ca/innovationpark

Innovation Place Research Park
Ken Loepky
+1 306 798 7275
saskatoon@innovationplace.com
www.innovationplace.com

LAVAL TECHNOPOLE
Mr. Pierre Desroches
+1 450 9785959
info@lavaltechnopole.com
www.lavaltechnopole.com

Québec Metro High Tech Park
Ms. Natalie Quirion
+418 650 2210
info@parctechno.com
www.parctechno.com

Sherbrooke Innopole
Mr. Pierre Belanger
+1 819 821 5577
pbelanger@sherbrooke-innopole.com
www.sherbrooke-innopole.com

Technoparc Bromont
Ms. Josée Nadon
+1 450 534 2021
josee.nadon@bromont.com
www.technoparcbromont.com

TECHNOPARC MONTREAL
Mr. Mario Monette
+1 514 956 2520
ydube@technoparc.com
www.technoparc.com

Technopole en Écologie Industrielle
Mr. Normand Gariépy
+1 450 742 7934
ngariépy@technopole-ei.com
www.technopole-ei.com

Technopole Saint-Hyacinthe Science Park St-Hyacinthe
Mr. Mario De Tilly
+1 450 773 4232
info@st-hyacinthetechnopole.qc.ca
www.st-hyacinthe.technopole.qc.ca

CHINA

Administrative Committee of Zhongguancun Fengtai Science Park
Ms. Lin Gao
+637 030 59
zgcjm@126.com
www.zgc-ft.gov.cn

Administrative Committee of Changping Science Park of Zhongguancun Science Park
Ms. Yan Mei
+86 021 6974 7672
cpcyzyx@126.com
www.zgc-cp.gov.cn

Administrative Committee of Daxing Biomedicine Industry Park Base of Zhongguancun Science Park
Mr. Sun Chao

+86 10 6125 2888
cbpzhaoshang@126.com
www.bjcbp.com.cn

Administrative Committee of Desheng Science Park of Zhongguancun Science Park
Mr. Zhang Xinhua
+86 10 6620 5328
xcdspark@163.com
www.zgc-ds.gov.cn

Administrative Committee of Shijingshan Science Park of Zhongguancun Science Park
Ms. Luo Yaoling
+86 10 6886 7526
zpark-qfb@163.com
www.zgc-sjs.gov.cn

Administrative Committee of the Zhongguancun Haidian Science Park
Ms. Xiuying Zhang
+86 10 8849 7200
zhangxy@zhongguancun.com.cn
www.zhongguancun.com.cn

Administrative Committee of Tongzhou Science Park of Zhongguancun Science Park
Mr. Nie Yuquan
+86 10 6952 6017
zgc_tzy@126.com
www.zgc-tzp.bjtz.gov.cn

Administrative Committee of Yonghe Science Park of Zhongguancun Science Park
Ms. Bao Wenhong
+86 10 5926 0100
yongheyuantongji@sina.com
www.zgc-yhy.gov.cn

Beijing HanHaiZhiYe Students Pioneer Park
Ms. Fan Xia
+86 10 6405 0575
bjhcdc2011@163.com
www.hanhaizhiye.com.cn

Beijing Zhongguancun International Incubator Inc.
Mr. Liu Xiaoming
+86 1082895673
chlq_bj@sohu.com
www.incubase.net

Beijing Zhongguancun Software Park Development Co., Ltd
Mr. Kefeng Liu
+86 10 8282 5690
wuhao@zpark.com.cn
www.zpark.com.cn

Chengdu Hi-Tech Zone
Mr. Zhang Bingyu
+86 28 828 297 39
cdhthemail@163.com
www.chengduhitech.co.uk

Guangzhou Panyu Innovation Park Co., Ltd
Mr. Bo Zhou
+86 20 3927 0881
zhouzd@126.com
www.innogz.com

Guizhou China – Australia Property Development Company Ltd. (China West Technology Park)

Mr. Jason Quinlan
+86 851 470 2922
info@cwtechpark.com
www.cwtechpark.com

Hong Kong Science & Technology Parks Corporation
Mr. E. Anthony Tan
+852 2629 1818
helen.chung@hkstp.org
www.hkstp.org

Huilongsen International Enterprise Incubator (Beijing) Co. Ltd
Mr. Liu Yong
+86 10 5975 5588
liuchuangyuan@huilongsen.com
www.huilongsen.com

Hundsun Science & Technology Park
Mr. Shengchun Ye
+862 228 5888 11
cxchan@hundsun.com
www.hspark.com

Nanjing Dongshan International Enterprise R&D Park
Mr. Hua Jin
+862 552 705 770
dskfgs@163.com

SDPIM – Macao Industrial Parks Development Co., Ltd.
Mr. Lo Loi Weng
+853 2878 6636
sdpim@macau.ctm.net
www.sdpim.com.mo

Shanghai Development Park Association
Mr. Hai Zhao
+86 21 542 35 033
szp.1953@163.com
www.sidp.gov.cn

Shanghai Hi-Tech Park United Development Co., Ltd.
Mr. Runiu Da
+86 21 6485 0000
chj@caohejing.com
www.caohejing.com

Shanghai Zizhu Science-based Industrial Park
Mr. Wen Shen
+86 21 612 59 076
wendy@zizhupark.com
www.zizhupark.com

Shenzhen High-Tech Industrial Park
Mr. Li Xiaodong
+86 755 2654 8590
lxd@ship.gov.cn
www.ship.gov.cn

The National University Science & Technology Park of Hebei University of Technology
Mr. Zhang Sixiang
+86 022 6020 3364
kcyj@hebut.edu.cn
www.hustpark.com

Tsinghua University Science Park - TusPark
Ms. Sonya Miao
+86 10 6278 5888 3595
jeanyuan@thsp.com.cn
www.thsp.com.cn

Wuhan East Lake High-Tech Zone Administrative Committee
Mr. Yaming XIA
+86 027 87804115
sysop@wehdz.gov.cn
www.wehdz.gov.cn/structure/index.htm

Zhejiang Hangzhou Future Tech City
Mr. Junfeng Feng
+86 159 2565 9400
feng@zjfuture.gov.cn
www.zjfuture.gov.cn

Zhongguancun Science Park (Z-Park)
Sun Xiaofeng
+86 10 8269 0607
visit@zgc.gov.cn
www.zgc.gov.cn

COLOMBIA

Corporación Universitaria Minuto de Dios – UNIMINUTO
Dr. Leonidas Lopez Herran
+57 1 291 6520
mgonzalezp@uniminuto.edu
www.uniminuto.edu

Parque Tecnológico de la Umbría – Universidad San Buenaventura de Cali
Mr. Juan Carlos Campo Rivera
+57 2 488 2222
jccampo@usbcali.edu.co
www.usbcali.edu.co

Universidad Industrial de Santander
+57 7 634 4000
viceinv2@uis.edu.co
www.uis.edu.co

CROATIA

BICRO Ltd. – Business Innovation Center of Croatia
Ms. Ivana Nagy
+385 1 235 2601
ured-bicro@bicro.hr
www.bicro.hr

Technology Park Varazdin Ltd
Mr. Andrija Petrovic
+385 422 13700
info@tp-vz.hr
www.tp-vz.hr

CUBA

AVANTE. Agencia de Consultoría y Negocios
Ing. Jorge Luis Oliva Martin
+537 832 8066
avante@avante.cu
www.avante.cu

DEL FOS, Consultoría del Ministerio de la Informática y las Comunicaciones
Ing. Marisela Font Rodriguez
+537 862 1289
delfos@delfos.co.cu
www.delfos.co.cu

CYPRUS

First Elements Euroconsultants Ltd.
Mr. Pantelis Dimitriou

+357 22 875710
ppastos@firstelements.com.cy
www.firstelements.com.cy

CZECH REPUBLIC

Science & Technology Parks Association CR
Ing. Pavel Svejda
+420 2 2108 2275
svejda@svtp.cz
www.svtp.cz

South Moravian Innovation Centre
Ms. Monika Vrbkova
+420 541 205 330
vrbkova@jic.cz
www.jic.cz

Technology Park Brno a.s.
Mr. Roderick Barker Mrics
+420 5 4119 1112
roderick.barker@technologypark.cz
www.technologypark.cz

DENMARK

Agro Business Park A/S
Mr. Lars Visbech Soerensen
+45 8999 2500
info@agropark.dk
www.agropark.dk

Business Kolding
Mr. Bjarke Wolmar
+45 76 33 21 11
info@businesskolding.dk
www.businesskolding.com

INCUBA Science Park Ltd.
Mr. Niels Sidenius
+45 87 34 55 55
ncs@incuba-sp.dk
www.incuba-sp.dk

NOVI Science Park
Mr. Jesper Jespersen
+45 96 35 45 00
novi@novi.dk
www.novi.dk

Scion DTU a/s
Mr. Steen Donner
+45 45 86 41 00
sd@sciondtu.dk
www.sciondtu.dk

Symbion Science Park
Mr. Peter Torstensen
+45 39 17 99 99
info@symbion.dk
www.symbion.dk

ECUADOR

Escuela Politécnica del Ejército (ESPE)
Mr. Carlos Rodriguez Arrieta
+593 239 89400
craarieta@espe.edu.ec
www.espe.edu.ec

PARCON ESPOL
Mr. Sergio Flores Macias
+593 422 69269
rector@espol.edu.ec
www.espol.edu.ec

Yachay – City of Knowledge
Mr. Ramiro Moncayo
+593 225 05660

rmoncayo@senescyt.gob.ec
www.yachay.es

ESTONIA

Tartu Biotechnology Park
Mr. Andrus Tasa
+372 7 383 053
biopark@biopark.ee
www.biopark.ee

Tartu Science Park
Mr. Toomas Noorem
+372 7 428 177
info@sciencepark.ee
www.teaduspark.ee

TEHNOPOL Tallinn Technology Park
Mr. Jaak Raie
+372 4 800 200
info@tehnopol.ee
www.tehnopol.ee

FINLAND

Culminatum Innovation Oy Ltd.
Ms. Marja-Liisa Niinikoski
+358 20 7619 550
culminatum@culminatum.fi
www.culminatum.fi

IQlink Oy
Mr. Georg Cheremisim
+358 44 0998 022
geo@iqlink.fi
www.iqlink.fi

Jari Ritsilä
Mr. Jari Ritsilä
+358 50 395 6016
jari.j.ritsilä@jyu.fi

Joensuu Science Park Ltd
Mr. Jari Lauronen
+358 132 677 110
jari.lauronen@carelian.fi
www.carelian.fi/en/front+page

Kuopio Innovation Ltd.
Mr. Heikki Helve
+358 10 229 0510
info@kuopioinnovation.fi
www.kuopioinnovation.fi

Lahti Science & Business Park, Ltd
Mr. Lauri Ylöstalo
+358 3 8114 11
info@lahtisbp.fi
www.lahtisbp.fi

Oy Karostech Ltd
Mr. Ilkka Kakko
+358 505 362 941
ilkka.kakko@globaloasis.fi
www.globaloasis.fi

Technology Centre Innopark
Mr. Mikko Koivulehto
+358 3 6241 0000
info@innopark.fi
www.innopark.fi

Technology Centre Logistia
Mrs. Tarja Pienimäki
+358 4057 11305
tarja.pienimaki@lclc.fi
www.logistia.fi

Technopolis Plc.
Mr. Keith Silverang
+358 40 566 7785

keith.silverang@technopolis.fi
www.technopolis.fi

TEKEL – Finnish Science Park Association
Mr. Jaakko Helenius
+358 46 712 1330
info@tekel.fi
www.tekel.fi

Turku Science Park
Mr. Rikumatti Levomäki
+358 103218800
rikumatti.levomaki@turkusciencepark.com
www.turkusciencepark.com

FRANCE

Agropolis International
Mr. Paul Luu
+33 4 67 04 75 75
agropolis@agropolis.fr
www.agropolis.fr

Angers Technopole
Mr. Christophe Angot
+33 2 41 720 404
contact@angerstechnopole.com
www.angerstechnopole.com

Atlanpole, the Nantes Atlantique Technopole & Business Incubator
Mr. Jean-François Balducchi
+33 2 40251399
balducchi@atlanpole.fr
www.atlanpole.fr

Ester Limoges Technopole
Mr. Fabrice Macquet
+33 5 5542 6000
ester@ester-technopole.org
www.ester-technopole.org

Fondation Sophia Antipolis
Mr. Jean-Noël Durvy
+33 4 9296 7800
chambon@sophia-antipolis.org
www.sophia-antipolis.org

Innovation, Territoires et Développement en Europe (ITD-Eu)
Mr. Matthieu Lacave
+33 1 43 70 21 59
matthieu.lacave@itdeu.eu
www.itdeu.eu

Laval Mayenne Technopole
Mr. Christian Travier
+33 2 43 49 75 00
technopole@laval-technopole.fr
www.laval-technopole.fr

RETIS
Ms. Cristèle Couget
+33 4 94 03 89 10
amelie.place@retis-innovation.fr
www.retis-innovation.fr

Savoie Technolac
Mr. Jean-Jacques Duchene
+33 4 7925 3636
info@savoie-technolac.com
www.savoie-technolac.com

SYNERGIA – Agence de développement économique Caen la mer
Mr. Pascal Hurel
+33 2 3146 7373
contact@synergia.fr

www.synergia.fr

Technopôle Brest-Iroise
Mr. Michel Morvan
+33 2 98 05 44 51
contact@tech-brest-iroise.fr
www.tech-brest-iroise.fr

Technopôle Marseille Château-Gombert
Mme Alexandra Magnier
+33 4 91 10 01 25
alexandra.magnier@marseille-provence.fr
www.technopole-marseille.com

Technopole Rennes Atalante
Mr. Frédéric Pauly
+33 2 99 12 73 73
technopole@rennes-atalante.fr
www.rennes-atalante.fr

Toulon Var Technologies (TVT)
Mr. Patrick Valverde
+33 4 94038904
tvt@tvt.fr
www.tvt.fr

GERMANY

Technologiepark Heidelberg GmbH
Dr. Andre Domin
+49 6221 5025710
technologiepark@heidelberg.de
www.technologiepark-heidelberg.de

Technologiepark Ostfalen
Mr. Bernd Juling
+49 39 2038 1810
info-tpo@tpo.de
www.tpo.de

TPH Technologie Park Herzogenrath/Aachen
Mr. Axel Friese
+49 2407 95830
info@tph.de
www.tph.de

Wissenschaftszentrum Kiel GmbH
Dr. Inge Schröder
+49 431 2008 6611
info@wissenschaftszentrumkiel.de
www.wissenschaftszentrumkiel.de

Wista-Management GmbH Berlin Adlershof
Mr. Hardy R. Schmitz
+49 30 6392 2210
schmitz@wista.de
www.adlershof.de

GREECE

Attica Technology Park
Mr. Nikos Kanepoulos
+30 210 650 3018
graf.proedrou@central.demokritos.gr
www.demokritos.gr

i4G (Incubator for Growth) S.A. – Euroconsultants Group of Companies
Dr. Theologos Prokopiou
+30 2310 804 800
info@euroconsultants.com.gr
www.i4g.gr

Patras Science Park
Mr. Konstantinos Tsekouras
+30 2610 911550
info@psp.org.gr
www.psp.org.gr

Science & Technology Park of Crete (STEP-C)
Mr. Artemis Saitakis
+30 2810 391900 - 5
inquiries@stepc.gr
www.stepc.gr

Technopolis Thessalonikis S.A. – High Technology Business Park
Mr. Anastasios Tzikas
+30 2310 365120
info@technopolis.gr
www.technopolis.gr

Thessaloniki Technology Park
Ms. Georgia Ayfantopoulou
+30 2310 498200
pask@thesteppark.gr
www.thesteppark.gr

INDIA

IKP Knowledge Park
Ms. Deepanwita Chattopadhyay
+91 40 2348 0022
info@ikpknowledgepark.com
www.ikpknowledgepark.com

MARG Science Park
Mr. Maniraj
+91 99 4068 1562
maniraj@marggroup.com
www.marggroup.com

Society for Innovative Education & Development ('EMPI' Vittal Centre INNOPOLIS)
Mr. Pankaj Saran
+91 2665 3764
pankaj.saran@empi.ac.in
www.empiindia.com

IRAN

Arak Science & Technology Park
Dr. Mohammad Reza Sangi
+98 861 222 6014
info@astp.ir
www.astp.ir

East Azarbaijan Science & Technology Park
Prof. A. Mirmohseni
+98 411 335 2261 - 3
info@eastp.ir
www.eastp.ir

Fars Science & Technology Park – FSTP
Dr. S. A. Fazelzadeh
+98 711 636 0302
info@fstp.ir
www.fstp.ir

Guilan Science & Technology Park (GSTP)
Dr. Majid Mottaghtalab
+98 131 424 3501 - 3
info@gstp.ir
www.gstp.ir

Isfahan Science & Technology Town (ISTT)
Ms. Mozghan Yazdian

+98 311 386 0619
international.affairs@istt.org
www.istt.ir

Kermanshah Science & Technology Park
Mr. Eivazi Shahram
+98 831 825 3811
info@kti.ir
www.kti.ir

Khorasan Science & Technology Park – KSTP
Dr. Seyyed Hasan Alamolhodaei
+98 511 5003333
info@kstp.ir
www.kstp.ir

Pardis Technology Park
Ing. Mahdi Safarinia
+98 21 76250 250
info@techpark.ir
www.techpark.ir

Persian Gulf Biotechnology Park
Mr. Farzin Haghdel
+98 763 5221 571
info@pgbp.ir
www.pgbp.ir

Persian Gulf Science & Technology Park
Dr. Mahdi Mohammadi
+98 77 125 30168
info@pgstp.ir
www.pgstp.ir

Qeshm International Incubator
Mr. Farzin Haghdel
+98 76 3524 0785 - 7
info@qiic.ir
www.qiic.ir/eng

Rooyesh ICT Incubator
Mr. Habibollah Asghari
+98 21 889 4649
habib.asghari@gmail.com
www.itincubator.com

Semnan Science & Technology Park
Mr. Mehrdad Eftekhari
+98 273 330 03 00
info@sstp.ir
www.sstp.ir

University of Tehran Science & Technology Park
Dr. Amir Ali Seifoddin
+98 21 8863 1400
president@stp.ut.ac.ir
stp.ut.ac.ir

Yazd Science & Technology Park (YSTP)
Dr. Mohammad Ali Amrollahi
+98 351 726 0116
info@ystp.ac.ir
www.ystp.ac.ir

IRELAND

Glashrooneen Ltd – SMART Park
Mr. Stephen Kilroy
+353 1505 2050
smart@carton.ie

ITALY

Alma Mater Studiorum Università di Bologna
Mr. Giuseppe Colpani

+39 051 2099778
segdamm@unibo.it
www.unibo.it

AREA Science Park
Mr. Adriano De Maio
+39 040 375 5181
direzionegenerale@area.trieste.it
www.area.trieste.it

Associazione Parchi Scientifici e Tecnologici Italiani (APSTI)
Mr. Alessandro Giari
+39 050 754 121
info@apsti.it
www.apsti.it

ComoNExt scpa
Dr. Stefano Poretta
+39 02 36714
segreteria@comonext.it
www.comonext.it

Fondazione Parco Tecnologico Padano
Dr. Gianluca Careno
+39 037 146 62212
ptplodi@tecnoparco.org
www.tecnoparco.org

Genova High Tech S.p.a.
Prof. Carlo Castellano
39 010 656 7111
daniele.castellano@ghtspa.it
www.genova-high-tech.it

Kilometro Rosso Science Park
Mr. Mirano Sancin
+39 035 591100
info@kilometrorosso.com
www.kilometrorosso.com

META Group
Ing. Luigi Amati
+39 07 4454 7111
info@meta-group.com
www.meta-group.com

Parco Scientifico e Tecnologico della Sicilia, S.C.P.A.
Prof. Marco Romano
+39 095 292 390
info@pstsicilia.org
www.pstsicilia.org

Polo Tecnologico di Navacchio – Polo Navacchio S.p.A.
Ms. Elisabetta Epifori
+39 050 754120
info@polotecnologico.it
www.polotecnologico.it

TIS Innovation Park (Area Business Incubator)
Dr. Petra Gratl
+39 0471 068 035
incubator@tis.bz.it
www.tis.bz.it

Trentino Sviluppo S.p.A.
Ing. Luca Capra
+39 0464 443 111
info@trentinosviluppo.it
www.trentinosviluppo.it

Vega Venice Gateway for Science & Technology
Mr. Daniele Moretto
+39 041 509 3001
master@vegapark.ve.it
www.vegapark.ve.it

JAPAN

Kyoto Research Park Corp.
Mr. Koji Okuda
+81 75 322 7800
gateway@krcp.co.jp
www.krcp.co.jp

JORDAN

Philadelphia University – Jordan
Dr. Ibrahim Badran
+962 647 99 000
info@philadelphia.edu.jo
www.philadelphia.edu.jo

KENYA

Egerton University
Prof. J. G. Mwangi
+254 51 221 7808
info@egerton.ac.ke
www.egerton.ac.ke

KOREA

Chungbuk Technopark Found.
Mr. Steven
+82 43 270 2132
sapi1975@cbtp.or.kr
www.cbtp.or.kr

Chungnam Techno-Park
Mr. Won-Cheoul Jang
+82 41 589 0600
jungsm77@ctp.or.kr
www.ctp.or.kr

Daejeon Technopark
Mr. Jin Ok Lee
+82 42 930 2804
andrew@djtp.or.kr
www.daejeon.or.kr

Gyeonggi Technopark
Ms. Kyoungjoo Nam
+82 31 500 3400
kay92677@gtp.or.kr
www.gtp.or.kr

Gyeongnam Technopark
Mr. Yoseph Jo
+82 55 259 3310
khosh@gntp.or.kr
www.gntp.or.kr/eng/index.asp

Jeju Free International City Development Center
Mr. Yong Seog Kim
+82 64 797 5585
solemio@jdcenter.com
www.english.jdcenter.com/index.htm

Korea Industrial Complex Corp. (KICOX)
Mr. Kyong Soo Kim
+82 70 8895 7296
grayfeat@naver.com
www.kicox.or.kr

Korea Technopark Association
Mr. Won Cheoul Jang
+82 26 009 3800
kta@technopark.kr
www.technopark.kr/eng/main/main.php

the INNOPOLIS Foundation
Mr. Jae Goo Lee
+82 42 865 8850
michelle@innopolis.or.kr
www.innopolis.or.kr

KUWAIT

**Kuwait University
Research Park**
Mr. Hasan Al-Sanad
+965 2498 5207
ovpr.ra@ku.edu.kw
www.ovpr.kuniv.edu/research
www.ku.edu.kw

LATVIA

Latvian Technological Center
Dr. Janis Stabulnieks
+371 6755 7919
ltc@latnet.lv
www.innovation.lv/ltc

LITHUANIA

Kaunas High-Tech & IT Park
Dr. Arturas Mickus
+370 37 491 030
info@techpark.lt
techpark.lt

**Klaipeda Science &
Technology Park**
Mrs. Roma Stubriene
+370 46 310 461
info@kmtpl.lt
www.kmtpl.lt

KTU Regional Science Park
Dr. Pranas Bernardas Milius
+370 37 300 808
admin@ktc.lt
www.ktc.lt

LUXEMBOURG

Luxinnovation EIG
Mr. Gilles Schlessler
+352 436 2631
gilles.schlessler@luxinnovation.lu
www.luxinnovation.lu

Technoport SA
Mr. Diego De Biasio
+352 54 55 80 1
diego.debiasio@technoport.lu
www.technoport.lu

MACEDONIA

Macedonia (FYROM)
SEEUTechPark
Mr. Aliu Azir
+389 4435 6198
techpark@seeu.edu.mk
www.techpark.seeu.edu.mk

MALAYSIA

Cyberview Sdn. Bhd
Mr. Tumin Nazri
+603 8315 6111
nazri@cyberview.com.my
www.cyberview.com.my

**Malaysian Tech. Dev. Corp. –
Technology Incubators**
**Mr. Zainul Fadziruddin
Zainuddin**
+603 2172 6000
mawar@mtdc.com.my
www.mtdc.com.my

Multimedia Dev. Corp. (MDEC)
Ms. Adeline Chee
+603 8315 0000
clic@mdec.com.my
www.mdec.com.my

**Technology Park Malaysia
Corporation Sdn. Bhd.**
Mr. Shahazman Abu Samah
+603 8998 2020
webmaster@tpm.com.my
www.tpm.com.my

MEXICO

CLQ Technopark, Colima
Dr. Jesús Muñiz
+52 312 316 2029
sefome@col.gob.mx
www.sefome.gob.mx

**Incubadora InnovaUNAM de la
Universidad Nacional
Autónoma de México**
Ms. Yasmin González Regalado
+52 555 623 3500, ext. 1455
yregalado@unam.mx
www.incubadoras.unam.mx

**Innovation & Technology
Transfer Park (PIT2),
ITESM Chihuahua**
Dr. Antonio Rios
+52 6144 395 042
antonio.rios@itesm.mx
www.chi.itesm.mx

**Instituto Tecnológico y de
Estudios Superiores de
Monterrey**
Dr. Armando Herrera
+52 55 5864 5311
incubadora.cem@servicios.itesm.mx
www.cem.itesm.mx

**Mexican Association of
Industrial Parks**
Ms. Claudia Avila Connelly
+52 55 2623 2216
ampip@ampip.org.mx
www.ampip.org.mx

**Parque de Innovación
Tecnológica del Centro de
Investigaciones Biológicas del
Noroeste, S.C.**
**Mr. Humberto
Villareal-Colmenares**
+52 612 123 8484, ext. 3492/349
pit@cibnor.mx
[www.cibnor.mx/es/
parqueinnovatec](http://www.cibnor.mx/es/parqueinnovatec)

**PIIT Parque de Investigación e
Innovación Tecnológica
(Research Park)**
Dr. Jaime Parada Avila
+52 81 2033 1100
contactopiit@mtycic.com.mx
www.piit.com.mx

**Tecnotam, Science &
Technology Park (Fideicomiso
Nuevo Santander)**
Mr. Othon Rodriguez
+00 11 5283 4318 3000
orodriguez@svam.com.mx
www.tecnotam.com

NAMIBIA

**Namibia Business Innovation
Centre (NBIC)**
Ms. Angela Von Wietersheim
+264 61 207 2001
nbic@plytechnic.edu.na
www.polytechnic.edu.na

NIGERIA

**Abuja Technology Village
Free Zone Company**
Ms. Hauwa Yabani
+234 807 723 5595
cpo@abujatechnologyvillage.com
www.abujatechnologyvillage.com

**University of Port Harcourt
Technology Park**
Prof. Henry Njoku
+234 8033103314
upt@uniport.edu.ng

NORWAY

Lillestrom Science Park, Kjeller
Ms. Anita Orlund
+46 47 24 11
post@kunnskapsbyen.no
www.kunnskapsbyen.no

PKS AS
Mr. Per Kjell Stole
+47 913 831 63
per.stole@siva.no

**Siva – The Industrial Dev. Corp.
of Norway**
Mr. Harald Kjelstad
+47 480 39 000
firmapost@siva.no
www.siva.no

OMAN

Knowledge Oasis Muscat (KOM)
**Mr. Mohammad Hamed
Al Maskari**
+968 2415 5152
info@kom.om
www.kom.om

**The Research Council (Oman
Science & Technology Park)**
Dr. Abdulbaqi Al Khabouri
+968 2434 3333
info@trc.gov.om
www.trc.gov.om

PAKISTAN

**National Science & Technology
Park (NSTP)**
Mr. Amer Hashmi
+92 51 111 11 6878
info@nust.edu.pk
www.NUST.edu.pk

PANAMA

**Incubadora UTP Incuba –
Universidad Tecnológica de
Panamá**
Dra. Juana Ramos Chue De Perez
+507 560 3000
rectoria@utp.ac.pa
www.utp.ac.pa

**Tecnoparque Internacional
de Panama**
Prof. Jorge Arosemena
+507 317 0111
jaroosemena@cdspanama.org
www.cdspanama.org

PARAGUAY

**Fundacion Parque
Tecnologico Itaipu**
Mr. Humberto Blasco

+ 59 5 212 15017
teresita.stefanich@pti.org.py
www.pti.org.py

PERU

**Pontificia Universidad
Católica del Perú (PUCP)**
Mr. Domingo Gonzalez Alvarez
+51 1 626 200, ext.5076
cide@pucp.edu.pe
www.cide.pucp.edu.pe

POLAND

Eureka Technology Park Ltd
Phd. Piotr Ratajczyk
+48 61 660 1118
office@eureka-tp.pl
www.eureka-tp.pl

**Gdynia Innovation Centre –
Pomeranian Science &
Technology Park**
Mrs. Edyta Depta
+48 58 735 1142
e.depta@gci.gdynia.pl
www.ppnt.gdynia.pl

**Jagiellonian Centre of
Innovation Ltd
(Krakow Life Science Park)**
Mr. Pawel Blachno
+48 12 264 1264
jci@jci.pl
www.jci.pl

Kielce Technology Park
Mr. Szymon Mazurkiewicz
+48 41 278 7200
biuro@technopark.kielce.pl
www.technopark.kielce.pl

Krakow Technology Park
Mr. Krzysztof Krzysztofiaik
+48 12 640 1940
biuro@sse.krakow.pl
www.technoinkubator.com

**Lublin Science & Technology
Park Joint Stock Co.**
Mr. Tomasz Malecki
+48 81 534 6100
biuro@lpnt.pl
www.lpnt.pl

Nickel Technology Park Poznan
Dr. Piotr Kwiatek
+48 61 658 5499
biuro@ntpp.pl
www.ntpp.pl

**Poznan Science &
Technology Park,
Adam Mickiewicz Univ. Found**
Prof. Bogdan Marciniak
+48 61 827 9742
ppnt@ppnt.poznan.pl
www.ppnt.poznan.pl

**Science & Technological Park
"Technopark Gliwice" Ltd Co.**
Dr. Jan Kosmol
+48 32 335 8500
info@technopark.gliwice.pl
www.technopark.gliwice.pl

**The Polish Agency for
Enterprise Development (PAED)**
Ms. Joanna Podgórska
+48 22 432 8080



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Mr. Maciej Potocki
+48 71 798 5800
wpt@technologypark.pl
www.technologypark.pl

PORTUGAL

Associação do Parque de Ciência e Tecnologia do Porto
Mr. Emídio Dos Santos Gomes
+351 229 431 690
geral@portuspark.org
www.portuspark.org

Associação Parque de Ciência e Tecnologia Almada/ Setúbal – Madan Parque
Dr. Alcino Pascoal
+351 210 438 600
info@madanparque.pt
www.madanparque.pt

Coimbra inovação Parque – Parque de inovação em Ciência, Tecnologia, Saúde, EM SA
Prof. Joaquim Norberto Pires
+351 239 842 265
geral@coimbraiparque.pt
www.coimbraiparque.pt

LISPOLIS – Pólo Tecnológico de Lisboa
Eng. Cândido Dos Santos
+351 217 101 700
geral@lispolis.pt
www.lispolis.pt

Parque Tecnológico da Mutela/Almada
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ptma@margueira.pt
www.caixadimagens.pt/ptma

PCI – Parque de Ciência e Inovação, S.A
Dr. Manuel António Cotão Assunção
+351 917 535 488
pci@pci.pt
www.pci.pt

Sines Tecnopolo
Ms. Monica Brito
+351 269 000 300
info@sinestecnopolo.org
www.sinestecnopolo.org

Taguspark – Lisboa Science & Technology Park
Dr. Victor Calvete
+351 214 226 900
taguspark@taguspark.pt
www.taguspark.pt

TECMAIA – Parque de Ciência e Tecnologia da Maia, S.A. E.M.
Mr. Antonio Manuel Lopes Tavares
+351 229 408 200
geral@tecmaia.com
www.brugodev.com/tecmaia

TECPARQUES – Associação Portuguesa de Parques de Ciência e Tecnologia
Mr. António Tavares
+351 214 226 930

tecparkes@tecparkes.pt
www.tecparkes.pt

QATAR

Qatar Science & Technology Park
Mr. Ahmed Al-Said
+974 44 547 070
info@qstp.org.qa
www.qstp.org.qa

ROMANIA

APITSIAIAR - Association of Industrial, Technological, Scientific Parks & Business Incubators
Mr. Emil Munteanu
+40 26 833 3674
apitsiar@gmail.com
www.apitsiar.ro

RUSSIA

Closed Joint-Stock Company "Technopark Sarov"
Dr. Yuri Pozdnyakov
+7 831 309 5148
office@tpsarov.ru
www.itechnopark.ru/en

High-Technology Parks Assoc.
Mr. Andrey Shpilenko
+7 495 739 7975
info@npotechnopark.ru
www.npotechnopark.ru

MSU Science Park
Mr. Oleg Movsesyan
+7 495 930 8454
msusoffice@gmail.com
www.sciencepark.ru

Technopark - Zelenograd, OSJC
Ms. Elena Botnikene
+7 499 940 1940
mail@tech-park.ru
www.tech-park.ru

Technopark Skolkovo
Dr. Maxim Kiselev
+7 495 961 0148
sktechnopark@corp.i-gorod.com
www.technopark.sk.ru

Technopark Strogino
Mr. Sergey Teplou
+7 495 756 2954
tpstrogino@mail.ru
www.tpstrogino.ru

The Bonch-Bruевич Saint-Petersburg State University of Telecommunications
Mr. Oleg Zolotokrylin
+7 812 315 0112
o.zolotokrylin@sut.ru
www.sut.ru

Zelenograd Innovation & Technology Centre
Mr. Lyubomir Trifunovich
+7 499 720 6917
zitc@zitc.ru
www.zitc.ru

SAUDI ARABIA

Dhahran Techno-Valley Company (DTVC)
Dr. Halim Hamid Redhwi
+966 3 860 3810
hhamid@kfupm.edu.sa

dtv.kfupm.edu.sa
Industrial Development Centre – KSA
Mr. Shadi Al-Tawil
+966 3 342 0000
jti@jti.edu.sa
www.sanad.biz

Makkah Techno Valley
Dr. Alamri Osamah
+966 2 527 0000, ext. 1596
oramri@uqu.edu.sa

Prince Mohammad Bin Fahd Bin Abdulaziz University
Dr. Yusef Suleiman
+966 3 881 2156
pmu_advancement@pmu.edu.sa
pmu.edu.sa

Riyadh Techno Valley – King Saud University
Dr. Abdulaziz Aldusari
+966 1 469 3060
adawsari@ksu.edu.sa
www.rtv.com.sa

Technology Parks Program
Dr. Fayez Almalki
+966 55 541 1131
falmalki@kacst.edu.sa
www.kacst.edu.sa

Wadi Jeddah
Dr. Mohammed Najeeb G. Khayat
+966 22 640 0000 - 51371
info@wadi-jeddah.com
www.wadi-jeddah.com

SERBIA

Patent & Law Office Nikolic
Ms. Jasna D. Nikolic
+38 11 141 6237
jnd.advo@yubc.net

SINGAPORE

Singapore Science Park Ltd.
Mr. Mun Hou Chew
+65 6774 4048
munhou.chew@ascendas.com
www.singaporesciencepark.com

SLOVAKIA

Central European Park for Innovative Technologies (CEPIT)
Mr. Joachim Armerding
+421 2 5443 1894
e.sallemova@cepit.sk
www.cepit.sk

Centrop s.r.o.
Mr. Michal Bakos
+421 2 2090 2665
info@realiz.sk
www.realiz.sk

SLOVENIA

Razvojni center za informacijske in komunikacijske tehnologije, d.o.o.
Mr. Bojan Dremelj
+386 4 207 35 00
info@rcikt.com
www.rcikt.com

Technology Park Ljubljana
Mr. Iztok Lesjak

+386 1 620 34 03
info@tp-lj.si
www.tp-lj.si

SOUTH AFRICA

eMonti Science & Technology Park
Mr. Ludwe Fani
+27 43 702 8200
ludwe@emontistp.co.za
www.emontistp.co.za

Free State University
Dr. Taylor Glen
+27 51 401 9778
info@ufs.ac.za
www.ufs.ac.za

Nelson Mandela Metropolitan University
Ms. Jacqueline Barnett
+27 41 504 1111
info@nmmu.ac.za
www.nmmu.ac.za

North-West University
Dr. Rudi Van Der Walt
+27 18 299 2857
rudi.vanderwalt@nwu.ac.za
www.nwu.ac.za

The Innovation Hub
Mr. Mclean Sibanda
+27 12 844 0045
msubban@theinnovationhub.com
www.theinnovationhub.com

Vaal University of Technology: VUT Southern Gauteng Science Park
Mr. Deon De Beer
+27 16 950 9153
deond@vut.ac.za
www.vut.ac.za

SPAIN

22@Barcelona
Mr. Josep Miquel Piqué
+34 934 019 757
22@mail.bcn.es
www.22barcelona.com

ADE Parques Tecnológicos y empresariales de Castilla y León, S.A.
Mrs. Itziar Martin Alonso
+34 983 548 045
ppttcyl@jcyles
www.adeparques.es

GPSInnovation
Dr. Angela Behrendt
+34 677 227 873
angela@gpsinnovation.es
www.gpsinnovation.es

ASIT (Asociación al Servicio de la Investigación y la Tecnología)
Mr. Pepe Pérez Palmis
+34 952 028 315
info@asit.es
www.asit.es

Association of Science & Technology Parks of Spain (APTE)
Mr. Felipe Romera Lubias
+34 951 231 306
info@apte.org
www.apte.org

+44 207 017 6941
scott.magrowski@informa.com
www.informahealthcare.com

Manchester Science Park Ltd
Mrs. Justyna Dabrowska
+44 161 226 1000
justyna.dabrowska@mspl.co.uk
www.manchestersciencepark.co.uk

NETPark
Miss Catherine Johns
+44 174 062 5180
netpark@wherebusinessgrows.com
www.uknetpark.net

ra Information Systems
Mr. Ian Underdown
+44 845 365 1071
info@ibcs-software.com
www.ibcs-software.com

SQW Limited
Mr. Robin Brighthon
+44 122 320 9400
rbrighthon@sqw.co.uk
www.sqw.co.uk

The Surrey Research Park
Dr. Malcolm Parry
+44 148 357 9693
M.Parry@surrey.ac.uk
www.surrey-research-park.com

The United Kingdom Science Park Association (UKSPA)
Mr. Paul Wright
+44 179 953 2050
admin@ukspa.org.uk
www.ukspa.org.uk

University of Warwick Science Park, Ltd
Mr. David Grindrod
+44 247 632 3003
contact@uwsp.co.uk
www.warwicksciencepark.co.uk

Warwick Enterprise Limited
Mr. David Rowe
david@warwickenterprise.co.uk
www.warwickenterprise.webplus.net

URUGUAY

Parque Científico – Tecnológico de Pando
Dr. Fernando Amestoy
+59 8292 8051
msanguinetti@pctp.org.uy
www.pctp.org.uy

UNITED STATES

BioSquare at Boston University Medical Center
Mr. Michael Donovan
+1 617 353 8630
donovanm@bu.edu
www.biosquare.org

Buffalo Niagara Medical Campus
Mr. Patrick Whalen
+1 716 854 2662
pwhalen@bnmc.org
www.bnmc.org

Central Florida Research Park
Mr. Joe Wallace
+1 407 282 3944

joe@cfrp.org
www.cfrp.org

City of Austin
Mr. Kevin Johns
+1 512 974 7819
egrs@austintexas.gov
www.austintexas.gov

Greater Dubuque Development Corporation
Mr. Mark Seckman
+1 563 557 9049
gddc@greaterdubuque.org
www.greaterdubuque.org

Lake Nona Medical City
Mr. Thad Seymour
+1 407 816 6675
medicalcity@lakenona.com
www.learnlakenona.com

Metro Orlando Economic Development Commission
Mr. Rick Weddle
+1 919 422 7159
info@orlandoedc.com
www.orlandoedc.com

Purdue Research Foundation
Mr. Gregory W. Deason
+1 765 588 3381
bburton@prf.org
www.prf.org

The Research Triangle Park
Mr. Robert Geolas
+1 919 549 8181
communications@rtp.org
www.rtp.org

The University of North Carolina at Charlotte, Charlotte Research Institute
Mr. Robert G. Wilhelm
+1 704 687 8284
criweb@unc.edu
www.charlotteresearchinstitute.com

WorldTech International, LLC.
Dr. Earnest Paylor
+1 703 778 5444 x130
tinfo@worldtech-int.com
www.worldtech-int.com

WTC Dulles Airport
Mr. Michael Runde
+1 703 401-1711
runde@usa.net
www.wtcdullesairport.com

VENEZUELA

Parque Tecnológico de Sartenejas – PTS
Mr. Gerardo Fernández López
+58 212 9064237
corporacionpts@pts.org.ve
www.pts.org.ve

VIETNAM

Hoa Lac Hi-Tech Park Management Board
Mr. Pham Dai Duong
+84 4 6326 9295
thuyt@hhttp.gov.vn
www.hhttp.gov.vn

New York

Atlanta

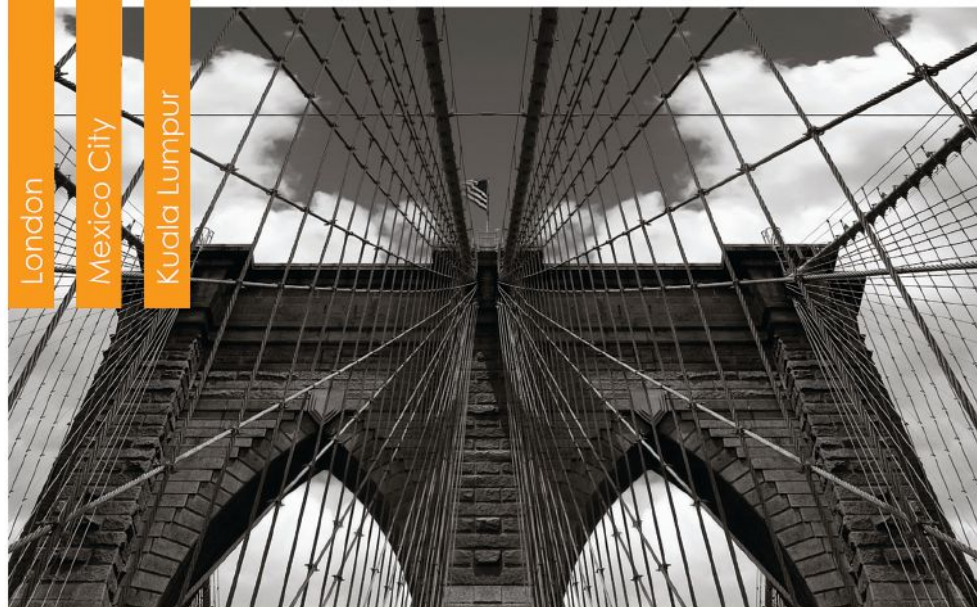
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State of Reinvention

Gov. Snyder very quickly gives Michigan's business climate an extreme makeover.

by **RON STARNER**

ron.starner@siteselection.com

The state that invented the Model T Ford, HP printer and Gerber baby food is now reinventing itself.

Long perceived as a high-tax, union-dominated state, Michigan — under the leadership of Gov. Rick Snyder — is rolling back taxes and regulations and freeing up the labor force to respond to the challenges posed by a rapidly changing global economy.

Just three years ago, such progress would have been unthinkable, as Michigan was locked in a battle to save itself from marginalization in the rush to outsource virtually all kinds of manufacturing jobs to China, Mexico, India, Thailand, Vietnam and other low-cost locations.



The Vista 475 is a Four Winns model made by Rec Boat Holdings, based in Cadillac, Mich. Rec Boat is expanding by adding a line of boats powered by jet propulsion.

Photo courtesy of Rec Boat Holdings

But a lot can change in a short amount of time, if a state's electorate is willing to replace old-school thinking with new-world economics.

Enter Snyder, the maverick reformer who made his fortune in the Gateway computer empire in Sioux City, Iowa, before plying the trade of politics in Lansing, Mich.

Convinced that Michiganders could do better than sit by idly and watch their most important industries die a slow and painful death of “flat-world” offshoring, Snyder propelled himself into the governor’s office with bold talk of scaling back corporate tax rates and liberating the most competent manufacturing work force in the country.

Just two and a half years later, the results speak for themselves. Since Snyder took office in January 2011, Michigan has experienced a remarkable turnaround. Consider the numbers:

- Michigan ranks No. 1 for states that recovered the most from the Great Recession, according to 24/7 Wall Street.
- Site Selection ranked Michigan No. 4 in the nation with 337 corporate facility projects in 2012 and No. 8 in overall economic competitiveness.
- Michigan’s corporate tax ranking is now ranked the third-most business-friendly among the country’s 12 largest states, according to the Tax Foundation.
- Michigan’s credit rating has been upgraded to AA, marking the first time that Michigan has rated above AA- since January of 2007, according to Fitch Ratings.
- Michigan’s unemployment rate is at the lowest it has been in four years.
- Michigan ranks third in the nation in high-tech job growth, according to Engine Advocacy.
- Michigan’s economy was the sixth-fastest-growing in the U.S. in 2011, according to the U.S. Bureau of Economic Analysis.
- Michigan is now the fastest-growing venture capital state in the country, with VC funding up 69 percent in the state since 2008. VC funding grew from \$3.0 billion in 2011 in Michigan to \$3.7 billion last year.

Optimism Hits the Corner Office

By rolling back business tax rates — including phasing out the personal property tax — and eliminating more than 1,200 burdensome regulations, Snyder has unleashed not only a flood of capital investment, but also a tidal wave of optimism among business leaders.

“The main contribution of Gov. Snyder is that business in Michigan has got its



Rec Boat Holdings is expanding its plant in Cadillac, Mich., to facilitate the assembly of a new line of jet-propelled watercraft. Photo courtesy of Rec Boat Holdings

confidence back,” says Doug Rothwell, CEO of Business Leaders for Michigan — a highly influential organization comprised of the chief executive officers of the largest Michigan-based companies.

“The decade that we went through shook our confidence in ourselves and our future,” Rothwell says. “The governor has restored that by taking a number of well-thought-out, pro-business measures. He has brought fiscal sanity back to government, passing a balanced budget on time two years in a row. He has made the state’s tax environment fair and made the regulatory environment much friendlier. In short, he has brought a positive, friendly attitude back toward business.”

As a result, Michigan’s business leaders are optimistic about the future once again.

David Sowerby, portfolio manager for Loomis, Sayles & Company in Bloomfield Hills, Mich., says the proof is in the pudding — or what he calls his “Prosperity Index.”

“I have a measure I call prosperity — job growth plus income growth,” he says. “For ten-plus quarters, Michigan has been growing much faster than the U.S. and generally has for the past three years.”

According to Sowerby, Michigan’s

Prosperity Index (job growth plus income growth) was 3.55 percent in the first quarter of 2013, compared to 2.83 percent for the U.S. — and in 11 of the past 13 quarters, Michigan’s PI has outpaced the nation’s.

This follows a decade (2000-2009) in which the average prosperity spread for Michigan, relative to the U.S., was a negative 3.50 percent.

“The primary reason for our economic turnaround is the fact that the current Michigan business climate is moving in the right direction,” says Sowerby. “The

best yardstick is the Tax Foundation’s State Tax Climate Index. Nationally, we are now at number 12, up from number 19 just a year ago.”

Sowerby notes that Michigan’s rapid turnaround is unprecedented. “Over the last two years, Michigan has witnessed the greatest improvement of any state relative to the corporate tax environment, individual income taxes, sales taxes, unemployment insurance and property taxes,” he says.

Sowerby says he has followed the Michigan economy closely for more than 20 years, and this is the biggest improvement he has witnessed.



Gov. Rick Snyder

“Michigan used to rank in the bottom five states in the Tax Foundation’s ranking based on corporate income tax,” he adds. “We now rank in the top ten.”

VC Funds Like What They See

Rothwell says he believes the comeback is sustainable as long as the legislature continues to follow the basic tenets of the Michigan Turnaround Plan that was adopted in 2009.

“We put together that plan because the state lacked a holistic strategy for turning the state around,” says Rothwell. “Nearly a third of the 10-year plan has been accomplished already.”

Built on a foundation of fiscal, budgetary and tax reforms, the Turnaround Plan also includes investing in higher education and infrastructure, “making sure we do not double-tax entrepreneurs,” a comprehensive funding plan for transportation, and funding early-childhood education, says Rothwell.

“For the first few years, our top priority was to fix the basics,” notes Rothwell. “Now we are beginning to take a much more forward-looking agenda for the future.”

Venture capitalists around the country are taking note of Michigan’s progress and voting with their checkbooks, says Christopher Rizik, CEO and fund manager of the Renaissance Venture Capital Fund in Ann Arbor, Mich.

“There has been a pretty big cultural change here in the last five years,” Rizik says. “As a big company area, the automotive companies took all the oxygen for many years and we became a risk-averse state. It was difficult to get people to do entrepreneurial things at the rate they should be doing them.”

The onset of the recession in 2008 “changed all that,” he says. “We found older, talented people moving into entrepreneurial opportunities and younger people coming out of school and jumping right into entrepreneurial ventures.”

Armed with \$100 million in venture

capital from Michigan’s largest companies, Renaissance invests in other venture capital funds around the country “under the condition that they begin to actively look at ventures in Michigan,” notes Rizik. “Ours was the first fund to do this privately.”

The model has proven so successful that it has since been replicated by Procter & Gamble in Cincinnati. “We now get calls regularly from around the country from other business groups that want to re-create this program in their state,” says Rizik.

And it’s no wonder why. For every dollar that Renaissance has invested, \$17 in new venture capital has returned to Michigan.

“We are seeing a dramatic increase in the number of startup companies, and we



Roch Lambert is group president of Rec Boat Holdings, the parent company of Four Winns, Glastron and Wellcraft boats.

Photo courtesy of Rec Boat Holdings

on a comeback that resonates with investors, young people and civic-minded business leaders.

Matt Cullen, president and CEO of Rock Ventures, is coordinating the downtown Detroit real estate strategy for Dan Gilbert, the founder and chairman of Quicken Loans Inc.

“Fundamentally, we made a decision to come down here and affect the outcome of Detroit,” says Cullen. “We are all hometown Detroit folks. There is

a great opportunity do good work here.”

Over the past two years, Gilbert has invested \$1 billion to purchase in excess of 7.5 million sq. ft. of real estate in Detroit, and more than 80 companies have moved into Gilbert-owned properties downtown.

“We now have 10,000 team members

working in the city of Detroit,” Cullen says. “We are buying beautiful buildings that are underpriced and turning them into places where people want to be today. We are creating great street life and a great working campus.”

The migration

of workers to downtown dwellings has created a CBD residential market that is now 98 percent occupied. “It is essentially full,” notes Cullen. “We have hired 3,000 new employees in Detroit, and we have brought 1,000 interns to the city. Our strategy is to recruit other companies down here.”

Chrysler and Twitter are among the larger firms that have moved downtown, and others are following. In fact, says Cullen, the build-it-and-they-will-come plan is working to perfection.

“Without any advertising, we had



“We are seeing a dramatic increase in the number of startup companies, and we are seeing younger people stay in Michigan when they come out of school.”

— Christopher Rizik, CEO and fund manager of Renaissance Venture Capital Fund

are seeing younger people stay in Michigan when they come out of school,” Rizik says. “We are seeing the research coming out of our universities being commercialized in a way we have never seen before. The number of startup companies in Michigan today is at least double what it was four years ago.”

The Motor City Gets a Tune-up

Nowhere is this newfound energy more palpable than in downtown Detroit.

Sick of being the punch line of late-night comics, Detroit has embarked

15,000 applicants to do internships with us," he says. "That is good for us. It is a great way to showcase our companies."

With a high probability that the municipal government will go into official bankruptcy, Cullen sees a parallel between Detroit and the fortunes of the Big Three automakers.

"The city of Detroit is very much in the same situation that GM, Ford and Chrysler were in several years ago," he says. "Getting this city back on a sustainable financial foundation is critical. But the Michigan business climate has improved significantly, and that will greatly enhance the comeback of Detroit."

An Industrial Shopping Spree

All around Michigan, evidence of business expansion is picking up.

The BASF Corp. Midwest Hub in Wyandotte added 190 workers in advanced material sciences last year. Both Consumers Energy in Jackson, and DTE Energy in Detroit, announced that they

will each purchase an additional \$1 billion in goods and services from Michigan companies over the next five years. And the Whirlpool Corp. continues work on its \$100-million global headquarters campus in Benton Harbor.

"The main contribution of Gov. Snyder is that business in Michigan has got its confidence back."

— Doug Rothwell, CEO of Business Leaders for Michigan

"We think that Gov. Snyder has made some significant improvements to the Michigan business climate," says Jeff Noel, corporate vice president for communications and public affairs for Whirlpool. "Whirlpool wants a good quality of life for our company and our employees, and on top of that Michigan is becoming a 'best costs state' for businesses to operate."

Noel adds that "businesses need to realize the unbelievable infrastructure that exists in Michigan. People tend to overlook assets like Grand Valley State University and Hope College. These are some of the best schools in the entire country. Michigan allows you to have access to the best and brightest talent, and Michigan is very supportive of technical training and all types of worker training."

Recently, Whirlpool made the decision to bring its refrigeration technology group to Benton Harbor. The \$25-million investment brings 200-plus technically oriented positions to Michigan. "We looked at other locations in the U.S. and Mexico for that group before deciding to locate it right here," says Noel.

"We are very proud to have our global design team right here in Southwest Michigan," he adds. "They could choose to go anywhere in the world, and they have chosen to come here."

Common Sense Pays Dividends

Tom Moran, president of Moran Iron Works in Onaway, Mich., says he is personally sold on the Michigan business environment after meeting with the governor.

"In general, Rick Snyder is the brightest man in the room and he has nothing but the best people around him — like

Mike Finney of the Michigan Economic Development Corp. They are the best of the best," says Moran, whose company hired 40 new workers recently to take its total work force to 115. "We plan to be at 200 employees by 2015."

Moran says that "this rebound has really started to take hold. Michigan has become friendlier to all kinds of businesses, not just manufacturing. It has more to do with good

business practices and common sense than anything else."

Moran calls the turnaround he has seen in Michigan "unbelievable. I have never seen a situation where both business and government were parallel in working hand in hand as a team."

Roch Lambert, group president for Rec Boat Holdings in Cadillac, Mich., echoes those sentiments.

"I feel very good about the Michigan economy moving forward," he says. "The governor is taking the right steps. I believe he will attract additional industries and more companies to the state."

Rec Boat — parent company of Four Winns, Glastron and Wellcraft — is expanding its manufacturing operation in Cadillac by launching a line of boats powered by jet propulsion. "These are high-performance boats with a more aggressive look," says Lambert, who retired from Bombardier in Quebec in 2009 before moving to Michigan in 2010.

"There is no doubt in my mind that Gov. Snyder is very business-minded," he adds. "For the launch of our new Scarab line — an investment that is very significant and adds 135 jobs — we received incentives from the state. We had discussions with MEDC, and they are very focused on finding solutions that meet our needs as a business. I have been very impressed with their responsiveness." ▼

This investment profile was prepared under the auspices of the Michigan Economic Development Corp. For more information, contact Leslie Hornung at 517-373-6217 or by email at leslie@michigan.org. On the Web, go to www.michigan.org.



Photo courtesy of Moran Iron Works

Tom Moran is president of Moran Iron Works in Onaway, Mich. Moran received a \$19-million contract with Consumers Energy through an MEDC program called Pure Michigan Business Connect — an online buyer-supplier database that connects Michigan-based companies with opportunities to buy and sell to each other.

It's Only Natural



Converging trends drive sustainable territories to the top of our annual rankings.

Yes, it's about green buildings. But it's also about how close they are to your house.

Sustainability involves hip, clean technologies like wind turbines and electric vehicles. But it also encompasses the dirty work of recycling glass into cullet and remediating derelict brownfields. Or the sometimes even dirtier work of policy formulation and implementation.

Each year we build the case for the Top Sustainable States, Metros and Foreign Countries based on an index that seeks to be as inclusive of all these aspects as possible. We tally LEED-certified buildings, and we also count corporate facilities involved in making green products. We look at renewable energy use, as well as the policy framework being put in place to welcome its use.

But even the things we don't count seem to point inexorably toward our winners. A June 2013 report from the EPA,

by **ADAM BRUNS**
adam.bruns@siteselection.com

for instance, with the suitably ponderous title "Our Built and Natural Environments: A Technical Review of the Interactions among Land Use, Transportation, and Environmental Quality" highlights compelling data on the anti-sprawl tendencies of such metro areas as San Diego; San Francisco-Oakland; Seattle; Portland, Ore.; Washington, D.C.; New York-Newark; and Houston — in other words, half of our Top 10 Sustainable Metros.

In another compelling overlay, 10 of our Top 20 Sustainable Metros happen to place among the top 15 healthiest, fittest cities in the country, according to the annual American Fitness Index released this spring by the American College of Sports Medicine. The nation's capital came in second in the country to Minneapolis-St.

Paul (which finished just out of our Top 20) in fitness and good health among the 50 most populous metros, followed in consecutive order by Top Sustainable Metros Portland, Ore.; San Francisco; Denver and Boston.

How do the stars align for the states? This spring's Bicycle Friendly States rankings from the League of American Bicyclists identified 13 of our Top 20 Sustainable States in its own Top 20 (led by Washington, Colorado and Oregon in that order), while the organization's new list of 259 Bicycle Friendly Communities was dominated by university towns and other cities in California, Colorado, Oregon, Iowa and others among our green state and metro leaders.

Places on the Move

But perhaps even more congruent with our Top Sustainable territories is the move toward smarter planning and transit-oriented development. The nation's capital and its neighboring communities are rife with mixed-use development projects seeking to capitalize on exactly that. And

Does green make a sound? It does out in the Bay Area, where Alameda-based wind power innovator Makani Power tested its airborne wind turbine kite-power technology this spring, just before the company was acquired by Google X.

Photo courtesy of Makani Power



“Green leases might well prove to be the ultimate solution to ensure that a building is actually managed and used in a sustainable way, which might lead to further and consistent environmental improvement of the building.”

— Elsbeth Quispel

in some cases the linking-up of transit can in turn link up with freshly redeveloped lands. That’s what’s happening in one of our Top 20 Metros, Greater Cincinnati, where the hugely successful redevelopment of the Ohio River waterfront is continuing even as Mayor Mark Mallory pushes forward on linking it with the Over the Rhine neighborhood via new transit.

“Transit-oriented development is important,” he said in a panel discussion at the Brownfields 2013 conference in May in Atlanta. “You need people moving from one place to another, people going from their houses to restaurants, spending their money. And a lot of companies move to an area because of the environment, the atmosphere, the vibe.”

That’s the case the world over. Ivanhoe Cambridge, Alberta Investment Management Corporation and Matco Investments,

co-owners of Eighth Avenue Place in Calgary, Alberta, announced in April that the building was certified LEED Platinum for Core and Shell. Gaining green cachet is important to many global companies, and perhaps especially so for those engaged in the energy sector in such locations as Canada, which tops our list of Top Sustainable Foreign Countries.

“When we were looking at signing an office lease and securing the best environment for our employees, it was clear that sustainability was a factor in our decision-making,” said Kevin Neveu, president and CEO, Precision Drilling Corp., a tenant in the Calgary building.

The territories and projects highlighted here are sustaining the vibe even as they are sustaining the planet and its inhabitants. Companies looking to sustain positive momentum are catching on.

The Mechanics of the Green Lease

Elsbeth Quispel joined Amsterdam-based Global Real Estate Sustainability Benchmark (GRESB) as head of sustainability in March, after several years advising clients on such issues for Jones

Lang LaSalle out of the Netherlands. Quispel says tenant engagement and green leases are increasingly important parts of GRESB’s annual survey (expected to be complete July 1), which considers the whole spectrum of sustainability. Here are her edited comments on the subject:

An important section in the Survey is Stakeholder Engagement, the purpose of which is to identify the steps taken by a property company or fund to engage with its stakeholders, including tenants, suppliers, the respondent’s work force and the local community, as well as the nature of that engagement.

An important aspect from a risk perspective is tenant engagement; a tenant is less likely to leave the building once its lease expires, if it has been more involved and potentially has invested in the building (fit-out) to improve its sustainability performance.

The landlord and tenant relationship is particularly important in situations where the landlord does not have operational control as far as sustainable practices are concerned. Having a fit-out and refurbishment program in place helps to align the views and actions of landlords and tenants.

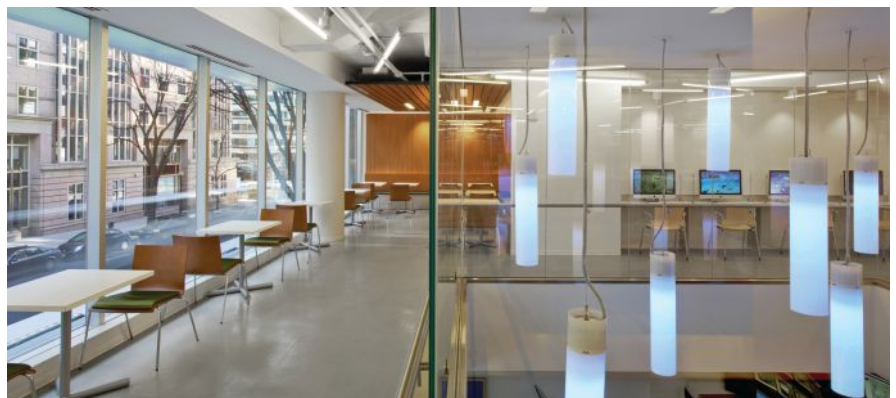
Top Sustainable States

- | | |
|------------------|-----------------|
| 1 California | 6 Texas |
| 2 Oregon | 7 Massachusetts |
| 3 Washington | 8 Iowa |
| 4 New York | 9 Colorado |
| 5 North Carolina | 10 Pennsylvania |

Honorable Mention

- | | |
|--------------|----------------|
| 11 Minnesota | 16 Arizona |
| 12 Wisconsin | 17 Florida |
| 13 Vermont | 18 Maine |
| 14 Illinois | 19 Michigan |
| 15 Georgia | 20 Connecticut |

State Rankings Criteria & Sources: *Green Industry projects and per capita projects as tracked by the Conway Data New Plant Database, Jan. 2011-March 2013 (including renewable energy manufacturing and supply chain facilities, biofuels and biomass, recycling plants, electric vehicle supply chain, etc.); Number of LEED Certified projects and LEED per capita, May 2013 (USGBC project database); Level of green incentives support, Database of State Incentives for Renewables & Efficiency (DSIRE), May 2012; EPA Brownfield Redevelopment Funding 2012-2013 and per capita brownfield funding (EPA); Renewable Power Generation and generation per capita (EIA, State Renewable Energy Profiles, March 2013); Alternative Fueled Vehicles and vehicles per capita (EIA Alternative Fuel Vehicles in Use data, May 2012); Energy Efficiency Scorecard Rankings, American Council for an Energy-Efficient Economy (ACEEE), Oct. 2012.*



Covered in Green

In late May, commercial real estate information, analytics and marketing services firm CoStar Group announced that the remodel of its headquarters in Washington, D.C. (above) had been awarded LEED-Platinum Certification for Commercial Interiors. The company’s offices in Boston, Atlanta and San Diego also either have LEED-Platinum status or expect it. Others in Chicago, Dallas and Houston are LEED-Gold certified. And facilities in Los Angeles, Denver and Phoenix (in addition to some of the cities already mentioned) are Energy Star certified by the EPA. Those cities represent 10 of Site Selection’s Top 17 Sustainable Metros.

Photo courtesy of CoStar

Top Sustainable Metros

- 1 Washington-Arlington-Alexandria, DC-VA
- 2 Chicago-Naperville-Joliet, IL-IN-WI
- 3 New York-Newark-Edison, NY-NJ-PA
- 4 Boston-Cambridge-Quincy, MA-NH
- T5 Houston-Baytown-Sugar Land, TX
- T5 San Francisco-Oakland-Fremont, CA
- 7 Los Angeles-Long Beach-Santa Ana, CA
- 8 Phoenix-Mesa-Glendale, AZ
- 9 Dallas-Fort Worth-Arlington, TX
- 10 San Diego-Carlsbad-San Marcos, CA

Honorable Mention

- 11 Philadelphia-Camden-Wilmington, PA-NJ
- 12 San Jose-Sunnyvale-Santa Clara, CA
- 13 Atlanta-Sandy Springs-Marietta, GA
- 14 Austin-Round Rock-San Marcos, TX
- 15 Seattle-Tacoma-Bellevue, WA
- 16 Portland-Vancouver-Beaverton, OR-WA
- 17 Denver-Aurora, CO
- 18 Baltimore-Towson, MD
- 19 Cincinnati-Middletown, OH-KY-IN
- 20 Charlotte-Gastonia-Concord, NC-SC

Criteria: Green industry projects tally Jan. 2011-March 2013 (New Plant Database); Green incentives as of May 2012 (DSIRE); LEED projects tally and per capita, May 2013 (USGBC); Energy Star Buildings Rank, May 2012 (EPA).

Additionally, these types of leases define the relationship between the landlord and the tenant, as well as the duties of both parties. GRESB also measures the extent to which respondents are implementing initiatives which empower them to influence tenant behavior, either via contractual obligations (green leases) or more informal obligations (Memoranda of Understanding).

As defined in many Green Lease Sustainability Toolkits, for example the Toolkit of the Green Building Council South Africa, the fundamental concept that underpins a green lease is that of mutual understanding. While the details may vary from one agreement to another, the primary purpose of a green lease is (1) to improve the operational performance of green buildings and (2) to deliver to landlords and tenants an equitable share of the incremental value provided by green buildings.

A green lease seeks to achieve these goals by securing long-term operational

performance through a transparent, mutually beneficial agreement between tenants and landlords that governs: (i) the base building and fit-out quality in buildings (ii) the contractual requirements of facilities managers (iii) the behavior of tenants from an environmental perspective and (iv) regulation of governing bodies (through continuing education).

In practice, green leases are generally used to describe a document for negotiating green building initiatives between the owner and the tenant of a building. They're not necessarily limited to a lease agreement, but could also refer to lease annexures, special lease terms and conditions, including building/property/facility management guidelines or rules.

A green lease is a performance contract, focusing on the sustainable operation of a building. It is an emerging vehicle for both tenants and building owners to unpack this shared benefit and future-proof their respective involvement in the property industry. Green leases might well prove to be the ultimate solution to ensure that a building is actually managed and used in a sustainable way, which might lead to further and consistent environmental improvement of the building.

Agreeing to Agree

In May, leaders from such companies as GE, Ernst & Young and Italian utility Enel called on companies and organizations around the world to embrace the next generation of the Global Reporting Initiative's (GRI) Sustainability Reporting Guidelines — G4.

"In the world of business, what gets measured, gets done," said Kim Hessler, director of citizenship at General Electric. "The G4 Guidelines highlight what needs to be done to influence ESG [environmental, social and corporate governance] sustainability in a positive direction."

Nelmara Arbex, the deputy chief executive at GRI who has led the development of G4, said, "In today's world, the increasing demand for sustainability information is inevitable. Increasingly governments, stock exchanges, investors, and society at large are calling on companies to be transparent about their sustainability goals and performance. But this demand is also a demand for sustainability related information that matters. This is what G4 is about.

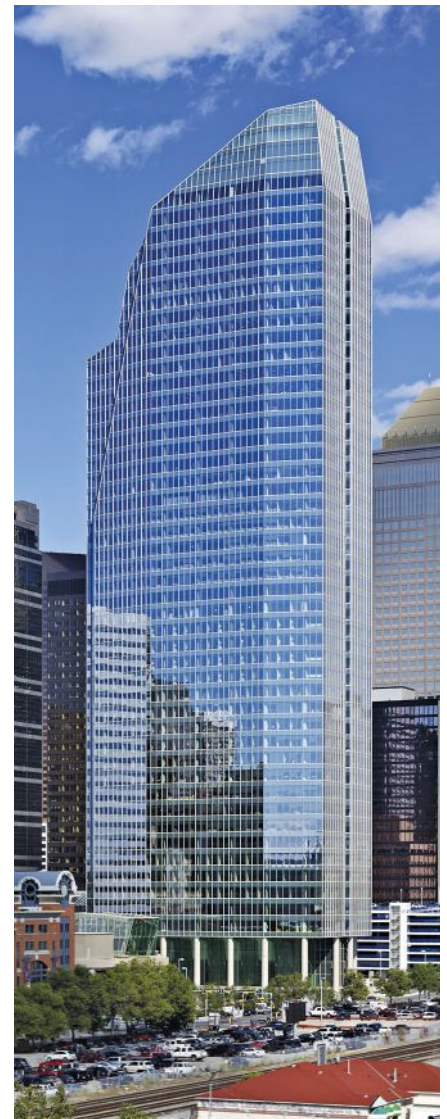
"The robust sustainability report of today must be far more than a compliance

Top Sustainable Foreign Countries

- | | |
|-----------|---------------|
| 1 Canada | 6 Sweden |
| 2 Chile | 7 Ireland |
| 3 Brazil | 8 Mexico |
| 4 Spain | 9 South Korea |
| 5 Germany | 10 Turkey |

Criteria: Green Industry Projects, Conway Data New Plant Database; E&Y Renewable Energy Indices, Feb. 2012; USGBC LEED Directory, May 2013; Renewable Energy Power Generation 2012, Energy Information Administration.

exercise," said Arbex. "It is a tool for demonstrating the effort reporters have made in integrating sustainability into their core business strategy, with benefits for business and society alike." ▼



Ivanhoe Cambridge, Alberta Investment Management Corporation and Matco Investments, co-owners of Eighth Avenue Place in Calgary, Alberta, announced in April that the building was certified LEED Platinum for Core and Shell.

Photo courtesy of CNW Group/Ivanhoe Cambridge

Food Grade Processing Plants Available

2110 West Jefferson Street • Springfield, OH



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- ◆ Processing Equipment Available

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New Braunfels, Texas

TOWNCREEK

Town Creek is a vibrant, mixed-use community taking shape within walking distance of downtown New Braunfels. The location is idyllic — 65 acres on the banks of Dry Comal Creek near its confluence with the Comal River. The community plan is innovative — including single-family houses, live/work and office/retail spaces, and parks. The lifestyle promises the best things about hometown Texas, plus contemporary conveniences. A restaurant is occupying approximately 6,000 sq.ft. on the corner. The remaining approximately 20,000 + sq.ft. will be a combination of office and retail.



- Square Footage/Acreage Available: up to 20,000 sq ft
- For Sale/Lease: Lease
- Rent: \$1.50/sq ft.
- Term: 5 year lease, with option to renew for another 5.

NEW BRAUNFELS REGIONAL AIRPORT

The New Braunfels Regional Airport (BAZ) is located in the San Antonio/Austin I-35 corridor, which is located within the Texas Triangle. To prepare for future growth, the 2010-2013 TX DOT Capital Improvement Program (CIP) has listed a total of \$11,226,900 in funding for BAZ project: including extension of Runway 13-31 to 6,350 feet and upgrades to associated taxiways, airport drainage, signage, lighting and electrical work and

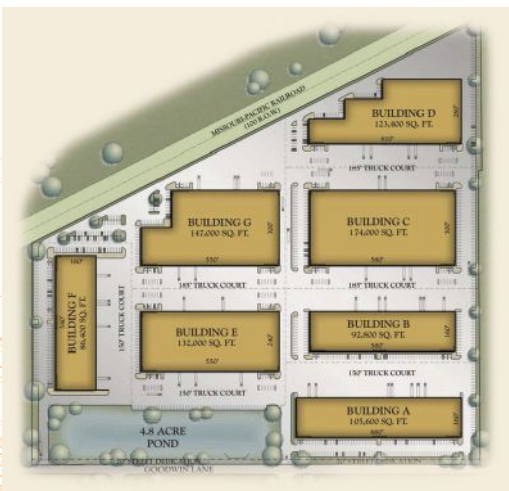


T-Hangar development. With recent announcements of National Flight Services and Berry Aviation relocating here, the New Braunfels Regional Airport is looking for tenants to grow the airport.

- Square Footage/Acreage Available
- For Sale/Lease: Ground Lease
- Rent: \$0.17
- Term: 20-30 year

KOONTZ McCOMBS DISTRIBUTION CENTER

Build to suit for New Braunfels Distribution Center can be comprised of four (4) class-A, high cube distribution warehouses. Buildings can range in size from a 60,000 square foot, rear-load warehouse up to a double-loaded building of approximately 142,000 square feet. Prior to full development, the site can lend itself to combining two or more of the floor plates to create a double-loaded building in excess of 320,000 square feet. Phase I of



the development will consist of one rear load building of approximately 105,600 square feet.

- Square Footage/Acreage Available: up to 100,000 sq ft.
- For Sale/Lease: Ground Lease
- Rent: \$6.50/sq ft/NNN
- Term: 5-10 years



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No Assembly Required

Interlocking logistics assets multiply returns and reduce process time in Greater Toledo.

by **ADAM BRUNS**

adam.bruns@siteselection.com

Dozens of projects engaged with moving goods have recently made good moves to Greater Toledo.

The projects may be new, but the reasons behind them are the same reasons the area's founding fathers and companies created The Glass City in the first place: a complementary mix of transport modes, and a capable work force and promising customer base each within easy striking distance.

It's no wonder, then, that transportation and integrated logistics is the lead key industry targeted by the Regional Growth Partnership, enhancing the viability of projects in the other key industries of automotive, food processing and agribusiness, advanced energy, advanced manufacturing and bioscience.

In 2012 Greater Toledo saw the attraction or retention of 90 economic development projects, which will create 3,200 new jobs and feature \$1.7 billion in capital investment.

Major projects in logistics have come from FedEx, Walgreen's, Kohl's, Best Buy, UPS, Menards, BX Solutions, Home Depot and Lowe's, among others in recent years. Some of them are coming back for more: FedEx Freight is siting a 188-door facility in Northwood, following FedEx Ground's 2009 launch of a \$90-million hub in Perrysburg that's grown its payroll to 470.

David Westrick, spokesman for FedEx



Photo courtesy of Chrysler Group

A powertrain assembly is married to a Jeep® Wrangler at Chrysler Group LLC's Toledo Assembly Complex, which in May celebrated its one-millionth Jeep Wrangler JK model. The complex's Toledo North section will add 1,105 new jobs on a second shift in the third quarter, bringing total complex employment to more than 3,000. In April Chrysler announced it would invest \$19.6 million in its Toledo Machining Plant in Perrysburg, following a \$72-million investment in 2011.

Ground, says factors such as a good workforce population always go into facility siting decisions, "but number one is always access to highways, and that is definitely the case there."

Home Depot already operates a facility in Allen Township, just north of Findlay along I-75, and is considering another major distribution center in Wood County's Troy Township, where the local zoning commission approved plans in May. The site is not far from CSX's new intermodal facility in North Baltimore, and has certifications as both a CSX Select Site and an Ohio Jobs Ready site.

"Logistics-wise, we've done very well in the last several years," says Wade Gottschalk, executive director of the Wood County Economic Development Commission.

A new routing of State Route 18 to the new CSX facility was a big help in providing a more direct route to I-75. What many see as a renewed state commitment to the business community meant that rerouting was done in a mere 18 months. There's also a new interchange at the site under consideration by Home Depot. And all signs are positive for a widening of I-75 to three lanes in the area between CSX's

facility and I-475 in Toledo.

Early June saw the launch of a new distribution center from cookware producer Calphalon Corp. in Wood County, part of the 20-county region represented by the Regional Growth Partnership, including three counties in southeastern Michigan.

“The site is approximately 12 miles from Calphalon’s Perrysburg manufacturing facility and will improve efficiency and service as we ship products to customers around the country,” says Connie Bryant, spokesperson for Calphalon parent Newell Rubbermaid. “Access to the Ohio Turnpike, Highway 582, State Route 75, and Highway 24 also make it a cost-effective shipping point, with easy access to all directions.”

The route of U.S. Highway 24 is dubbed “Fort to Port” for its direct line between Fort Wayne, Ind., and the Port of Toledo. A decades-long effort to improve the highway was completed in 2012. Dean Monske, president and CEO of the Regional Growth Partnership, says the Highway 24 improvements have cut 35 minutes off the Fort-to-Port drive while making it safer at the same time. Moreover, the project has now afforded communities along the corridor the opportunity to showcase hundreds of acres of prime land served by robust infrastructure, he says. “They’ve been waiting for

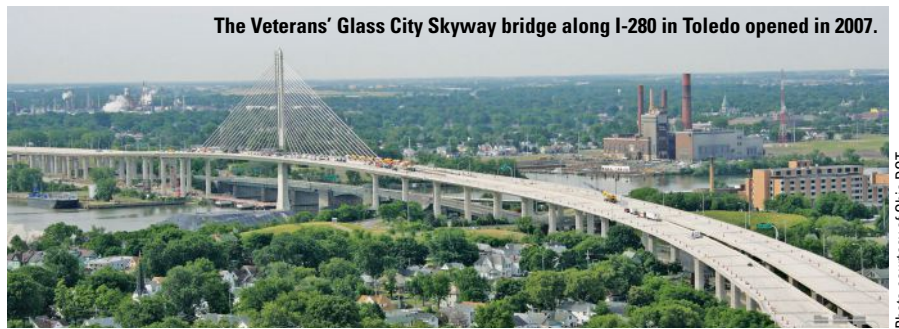


Photo courtesy of Ohio DOT

years to see it completed,” Monske says. “I think you’ll see a lot of places in Northwest Ohio benefiting.”

Waterville is one of those places. So is Defiance, where Consolidated Grain and Barge (CGB) this summer will start up a new \$23-million grain storage and shipment terminal with the capability to load out 90-car unit trains.



**Rich Martinko, director,
University of Toledo
Intermodal Transportation
Institute**

Overall, four major railroads move freight through Northwest Ohio, making the region one of the top five U.S. rail hubs. Norfolk Southern is investing \$160 million in a 275-job expansion at its freight classification site in Bellevue, 45 minutes southeast of Toledo. When completed in 2015, Bellevue will be the largest such yard on the NS system with 80 tracks.

Want another unfair advantage? The Toledo-Lucas County Port Authority just

expanded its Free Trade Zone in January to encompass all of Sandusky, Henry, Wood, Lucas and Defiance Counties, while reorganizing under the Alternative Site Framework, which “takes a six- to nine-month process and shortens it to 30 to 45 days,” says Paul Toth, president and CEO of the Port Authority.

Assets for Access

Harlan Reichle is president and CEO of commercial real estate firm Reichle Klein Group and chairman of the board of the Regional Growth Partnership.

“We’re consistently fielding inquiries that are logistics-based requirements,” he says of his firm’s work. However, he’s frequently surprised by the lack of knowledge in the national industrial community about the dynamic activity in the area

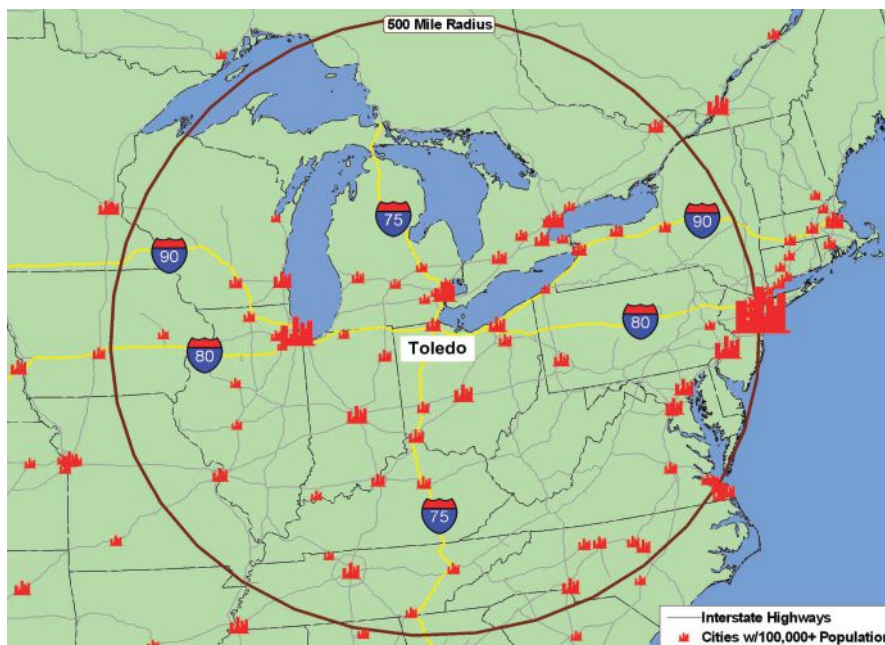
One source of that knowledge is Rich Martinko, director of the University of Toledo Intermodal Transportation Institute.

“The unique thing about the Toledo area is you rarely find a location with a convergence of all the modes — rail, air, water and surface, and then pipelines,” he says. Surface transportation improvements have included more than \$500 million in recent work.

The result? The Texas Transportation Institute’s annual list of most congested areas in the nation lists Toledo in the bottom 10 percent, as one of the least congested freight highway systems in the country.

“That’s huge for the new Chrysler plant,” he says of the company’s growing Toledo Assembly Complex. “They want guaranteed scheduling, and that kind of mitigation of congestion is a big deal.”

“We see Northwest Ohio as the Chicago of 50 years ago,” observes Toth. “Great assets, just not the congestion that other places have.” ▼



No Matter How You Slice It: An impressive number of significant cities sit within 500 miles of Toledo. There is more industrial square footage within 300 miles of Toledo than any other location in the U.S. and Canada. And some 9 million people live within 100 miles.

This investment profile was prepared under the auspices of the Regional Growth Partnership. For more information, call 419-252-2700 or visit rgp.org.



Grow If You Want To

Listen to the guides and they'll tell you: The Rockies are a nice place to launch.

by ADAM BRUNS

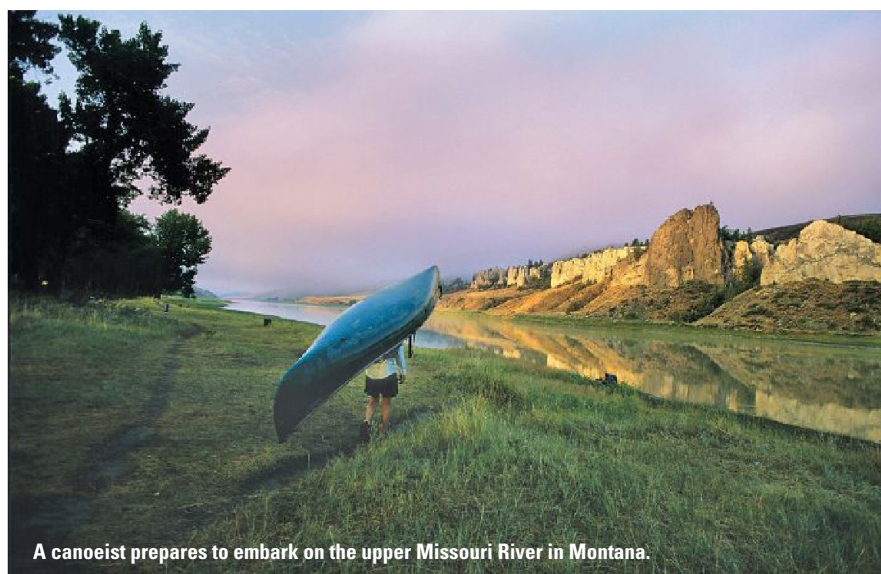
adam.bruns@siteselection.com

Led by the U.S. Small Business Administration's Business Person of the Year for 2012, and picked as Montana's Innovation Company of the Year in August 2012, Simms Fishing Products, captained by President K.C. Walsh, moved into a new 60,000-sq.-ft. (5,574-sq.-m.) headquarters, production and distribution facility in Bozeman last year.

"This company truly is an economic engine for our state," said Montana's senior U.S. Senator Max Baucus in highlighting the company's 75-percent payroll growth from 2009 to 2011. Walsh gave credit to Baucus for "breaking down trade barriers abroad" and thus boosting Simms' ability to create jobs in its industry-leading role as a provider of apparel for outdoor sports professionals and guides. Between 2010 and 2012 Simms grew sales by 20 percent.

Walsh relocated the company from Jackson, Wyo., to Bozeman, home of Montana State University, in 1993. Why? "Walsh grew up in a flyfishing family and it was his life-long dream to live, and work, and play in Montana," says the firm. Today the firm is the sole fishing wader manufacturer to produce its products in the United States, and employs 120 people.

That's well within the defined size of a small to medium-sized enterprise (SME), which, according to who's counting, can range as high as 500 employees — a lunker-sized catch for any community. A number of sources indicate the Rocky Mountain states of Colorado, Idaho, Mon-



tana, Utah and Wyoming are primed to welcome exactly that sort of business.

States and Cities Working Together

Start with Utah, which held the top spot for the sixth consecutive year when the American Legislative Exchange Council released its annual "Rich States, Poor States: ALEC-Laffer State Economic State Competitiveness Index" report in May. Idaho placed sixth in the rankings, which project the 50 states' economic outlooks using 15 equally weighted policy variables, including various tax rates, regulatory burdens and labor policies.

The authors gave credit to Utah's pro-business leadership. They could also give credit to the entrepreneurial bent of its public-private programs supporting SMEs, such as the Goldman Sachs 10,000 Small Businesses initiative. Goldman Sachs launched the program in Salt Lake City in

2012 in partnership with GOED, committing \$10 million for small business loans and grants and another \$5 million for business education through a partnership with Salt Lake Community College.

Utah and Idaho also performed well in the second-annual Thumbtack.com Small Business Friendliness Survey, conducted in partnership with the Ewing Marion Kauffman Foundation and released in early April. The survey of more than 7,700 business owners found that Utah, Alabama, New Hampshire, Idaho and Texas rated as the top-five friendliest states.

Among the expanding list of tools in Idaho, as a result of the 2010 Census, the southern Idaho region's New Market Tax Credit area has significantly expanded, and now includes the cities of Twin Falls, Jerome, Burley and Rupert in the New Market Tax Credit impact zone. The change opens the communities' businesses

Photo courtesy of Montana Office of Tourism



PUEBLO, COLORADO. NO ORDER TOO TALL.

Pueblo has properties of all sizes, ready to move in tomorrow. Maybe you're not in the business of giraffe handling, but if you were, Pueblo can handle that and so much more! With a skilled and qualified workforce ready to punch the clock, millions of dollars in incentives, plenty of access to rail and available properties, there truly is no order too tall for us.

Pictured above: 200,000 sq. ft., 11 acre (former) rocket facility including ceiling heights 4 giraffes high, available today. *Giraffes not included in incentive package.



For more information contact
Pueblo Economic Development Corp.

Web: www.pedco.org
Email: rwerner@pedco.org
Phone: 719-544-2000

and developers to between 15 percent and 20 percent in total subsidies on qualifying future projects. “We anticipate this will be a new and major tool toward growing and improving business development and related projects in four of the growing cities in southern Idaho,” says Jan Rogers, executive director of Southern Idaho Economic Development Organization.

The Kauffman Index of Entrepreneurial Activity released in April found that business creation rates remained highest in the West. Among states, Montana had the highest entrepreneurial activity rate, with 530 per 100,000 adults creating businesses each month during 2012.

In Forbes’ “Best Cities For Jobs 2013” rankings, released in May, Boulder, Colo., was 7th in the nation; Provo-Orem, Utah, was 11th; Salt Lake City was 16th; Cheyenne, Wyo., 25th and Billings, Mont., 31st out of all 398 U.S. metro areas.

TECH-Net, a database tracking Small Business Innovation Research (SBIR) awards and Small Business Technology Transfer (STTR) awards, reveals that, for the years 2010-2013, Colorado was sixth in the nation in combined SBIR and STTR awards, with 312 totaling more than \$102 million. No doubt many of those firms are also assisted by the type of program launched by Pueblo Economic Development Corp. in June: a matching grant program funded with \$35 million in local economic development taxes in conjunction with Gov. John Hickenlooper’s Advanced Industries Accelerator Act.

“Companies come to Colorado for the right reasons. The location fits their business model,” said Richard Werner, vice president of Pueblo Economic Development Corp. “The incentives are a wonderful additional benefit that reduces the cost and burden of expanding to a new location. If we can help the

“A good business climate in general is going to benefit both small and large enterprises.”

— Mark Schill, vice president for research, Praxis Strategy Group



process by expediting the project through permitting and adding a cash value then the company can concentrate on hiring employees and becoming profitable as soon as possible.”

Enterprise Cultivation

The 2013 Enterprising States report from the U.S. Chamber of Commerce and Praxis Strategy Group, released this spring, focused on business climate factors affecting SMEs and entrepreneurs, measuring all 50 states across a number of meaningful criteria. The five Rockies states perform well, led by Utah, which placed among the top 10 across all six topical areas.

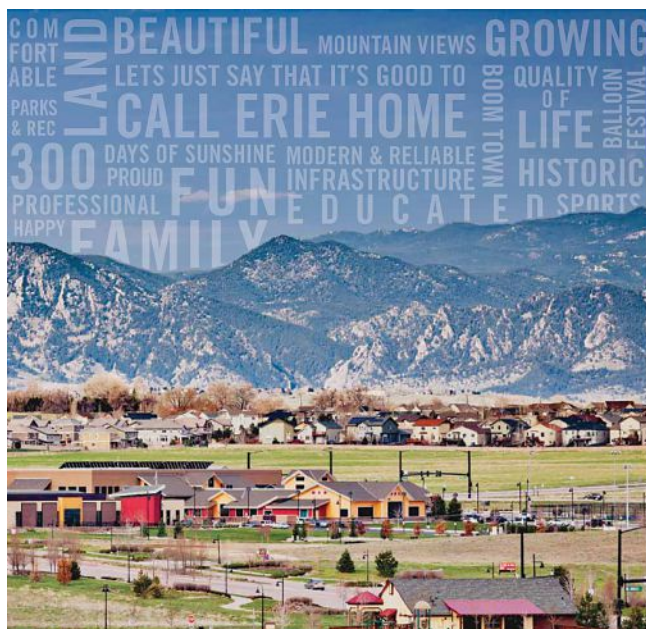
It has a lot to do with the unique settings, programs and institutional infrastructure for SMEs that the states and

their metro areas provide, says Mark Schill, vice president for research at Praxis and lead analyst for the Enterprising States report.

“States and economic developers in general are increasingly moving toward entrepreneurial support, and focusing on locally grown companies,” he says, because emerging research says those firms are the ones creating jobs.

The concept of “economic gardening,” he says, had its origin in the Rockies, specifically the Denver-area municipality of Littleton, where Chris Gibbons “really pioneered that line of thinking, and it’s slowly become a movement.” Gibbons, the city’s director of business/industry affairs, retired last year after more than 25 years with the city. The departure came as city leaders looked to move beyond economic gardening as a central economic development mission, even though sales-tax revenue and jobs have achieved stellar and steady gains under Gibbons’ tenure.

“I think a good business climate in general is going to benefit both small and large enterprises,” says Schill, particularly when it comes to talent and work force issues. He notes that all five states are in the top 15 in business climate nationally, and also do very well on talent measures. “That’s part of why those states have been successful lately,” he says. He also observes that a lighter manufacturing profile in the Rockies meant the region didn’t suffer when the bottom fell out of



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the manufacturing economy a decade ago. “They’re newer in their development trajectory,” he says of the Rockies states’ industry composition.

Do universities deserve some credit? Schill says all five states are in the top half for college affordability, and four are in the top 15. “We’re seeing increasing partnerships between universities and business and between universities and economic developers,” he says. “It’s more than a tech transfer office, it’s a much more explicit partnership, starting at the governor’s level.”

Schill’s research colleague Matthew Leiphon cites the Colorado First incentive program run by the Colorado Community College system. Schill says the Colorado Innovation Network is another great resource, as are the Idaho Technology Council’s iGem initiative and the USTAR (Utah Science Technology and Research) program.

Getting things done on a faster trajectory is also high on SMEs’ priority list, and states are responding by trying to streamline policies and procedures for permitting. Leiphon says Colorado and Utah both launched regulatory streamlining processes that brought small business to the table. “In Utah they cut 358 regulations, according to our 2012 report,” says Schill, noting that the state’s other standout attributes include its regulatory structure for banking and its high number of multilingual individuals.

Here are further highlights from the *Enterprising States* report:

Colorado

Colorado’s Enterprise Zone tax credit program offers a variety of credits and exemptions to businesses that create jobs in designated zones, including economically distressed rural areas. Looking to enhance the program, the state launched a task force in 2012 to identify reforms for review and adoption by the 2013 legislature.

The CO-EXIst initiative offers grants and support to companies seeking to do business in China and Mexico, funding trade missions and other export enhancement activities.

Idaho

Idaho’s business establishment birthrate ranks a robust 9th among the states, and



Football games are great, but accessing the emerging talent present at places such as Folsom Field during the 2013 commencement ceremonies at the University of Colorado Boulder is something companies large and small can really get behind. Photo by Glenn Asakawa/University of Colorado

its business climate ranks 10th overall, “an accomplishment that is undoubtedly fostered by the Business.Idaho.gov web portal, created to help simplify business interactions with the state government.”

Montana

Small business development in Montana is supported through the state’s Micro-Business Finance Program. Active for more than 20 years, the initiative offers loans to companies with up to 10 employees, working through the state’s network of MicroBusiness Development Corporations. In addition to providing funding to finance expansion and associated job creation, the program offers businesspeople access to training, information, and other resources they need to improve their companies’ competitiveness.

Montana’s Growth Through Agriculture program offers grants and loans to businesses in the process of developing marketable agricultural products and processes.

The state’s Indian Country Economic Development initiative directs funding to support economic development projects, workforce training, entrepreneurial development programs, and other job creation efforts on the reservations of the eight sovereign tribal nations present in the state.

Utah

There are more than 7,000 technology companies in Utah, according to the Utah Technology Council, and job growth in these companies is twice that of businesses outside the high-tech industry. In 2012, the Utah Legislature approved \$2.5 mil-

lion in funding for The Engineering Initiative. This funding will help recruit faculty, strengthen distance education systems, and provide scholarships to increase the supply of engineering graduates needed to sustain the growth and attraction of high-tech companies. USTAR also received \$6 million in 2012 to support research and innovation at Utah’s universities, creating commercial opportunities leading to private sector business development and attraction.

Startup Ogden is one example of the State of Utah and the Governor’s Office of Economic Development teaming with higher education to boost economic development. A relationship with Weber State University offers technology and business skills training to residents and to startup businesses in the community.

Wyoming

Wyoming’s Business Ready Community program creates a structure for the state to partner with cities and towns on job creation. Under the terms of the program, the state provides loans and grants to finance infrastructure upgrades needed to help a business expand or locate in a community, undertake economic planning, or upgrade amenities to make a community more attractive to business activity.

To help new small businesses easily gain access to the permits and licenses they need to get up and running, Wyoming established a Business Permitting Assistance Office. This one-stop shop offers entrepreneurs easy access to information on regulations related to starting and growing a business. ▼



Next Generation

Two projects showcase a state's twin penchants for tradition and innovation.

In early January, automotive visionary and entrepreneur Paul Elio announced that his fledgling company Elio Motors would employ 1,500 people in producing Elio's cute, green and ultra-high-mileage three-wheeled car in the giant former General Motors facility in Shreveport that used to produce the intimidating and gas-guzzling Hummer.

Talk about a paradigm shift.

But Elio thinks the world is ready — not just for his 84-mpg, \$6,800 vehicle with a 5-star safety rating, but for some good old American manufacturing.

"I became an engineer in part because America's trade deficit troubled me," he said on Jan. 4. His new project kicked off five years ago from emotion as much as engineering, he said, as oil prices went through the roof, and his future ex-wife told him to stop watching the news because it made him so angry.

"I took a walk after that comment, thought about it, and went in to work the next day and kicked off the project that became Elio Motors."

But that didn't mean the rest of the world had caught up to his reasoning.

"You'd be shocked at the number of city, state and county leaders who have asked me, 'Why aren't you building this in China?'" he said in January. "I said, 'Are you kidding me?'" In all honesty, I never heard that in Louisiana. I swear to God, I heard it over and over again. We have the white flag up, and we don't need to. We are still the best engineers and the best manufacturers in the world."

In an interview, Elio says everything about Shreveport is right, from the physical assets to the soft assets (a former GM work force of 3,200) to the ease of working with RACER Trust, which

by ADAM BRUNS

adam.bruns@siteselection.com

took over the marketing of the former GM property along with about 79 others in the past few years as a result of the GM bankruptcy. Local and state government

responses have been right too.

"On a scale of one to 10, my experience in Louisiana is an 11,"

says Elio. That includes the support his team has received from the Caddo Parish Council.

"We had a similar opportunity several years ago in a different community, and we needed exactly half as much help as we needed from you," he told the audience, "and they said, 'No, we can't do that, but we wish you luck.' Unfortunately, wishes don't create jobs. That site, they could not get under control. It went to a demo guy, it was torn down for the scrap value, and it's

now a 3.3-million-square-foot empty slab. Because you guys were willing to help us out, this deal is possible and we can fill this place with jobs."

Capital Assembly Before Car Assembly

Asked just how frequently he heard the comment from potential suitors about manufacturing in China, he says, "I heard it no less than 50 times. We view ourselves as not being competitive, and it's just not true. I am confident this vehicle built in Shreveport can compete globally. But we have to get one to come off the line and sell a few here first ... we have to crawl before we can walk."

Helping pave the way is legislation in a growing number of states that exempts the vehicle — considered a motorcycle under federal and state safety regulations because of its three wheels — from helmet laws. Louisiana's exemption for such "autocycles"



Paul Elio is founder of Elio Motors, which plans to employ 1,500 people in making its unique three-wheeled vehicle in part of the former GM complex in Shreveport.

Photos courtesy of Elio Motors



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was signed into law by Gov. Jindal on May 30, and becomes effective next January 1.

Asked about financing, Elio says, "We don't have all the money, but we're on track. A lot of people have looked at the capital stack and are comfortable with it. One thing folks can do to help is make reservations. That makes it easier to get the next event to happen."

So the road show continues, on the road to what Shreveport and Elio hope is a bright green future.

"We have proved to ourselves and our stakeholders, with data, that we can build a low-cost, high-quality, high-mileage vehicle in this city with 95 percent American content," Elio told his audience in January. "Over the next 18 months we're going to prove it to you by actually doing it."

Family Tradition

The metro area of Houma-Thibodaux, La., deep in the Bayou, is best known as a hub for offshore oil & gas and shipping/transport services, serving about half of all drilling rigs in the Gulf of Mexico and over 75 percent of deep-water oil production in the Gulf.

Hmmm. Might be a good place for a growing third-generation Louisiana company in the offshore services sector to stay and prosper.

That was the decision announced in May by **Danos**, which will move its headquarters from nearby Larose to Gray, located halfway between Houma and Thibodaux along U.S. Highway 24. The company will invest \$10 million in the new HQ. It also is evaluating multiple Louisiana port locations for a new, \$20-million manufacturing and fabrication facility. The company anticipates adding 426 jobs over the next five years to its 1,600-employee payroll (1,100 in Louisiana).

Founded by Allen Danos and Syriaque Curole as a crew boat company 66 years ago, Danos has evolved into one of the largest oilfield service companies in the Gulf of Mexico region.

“On a scale of one to 10, my experience in Louisiana is an 11.”

— Paul Elio, Elio Motors

Construction of the HQ will begin by late summer, with the manufacturing site to be selected within three months and construction of that facility to begin before the end of 2013. Both new facilities will be complete by the end of 2014.

Until today, the relatively small site in Larose that houses both the HQ and manufacturing has supported offshore activity with piping fabrication, production skids and module manufacturing. But strong growth the past few years, combined with some ambitious growth plans for the next five years, signaled a need to expand.

"The business had the best year ever in terms of our manufacturing operation in 2012," says Danos Executive Vice President Eric Danos. "From a capacity standpoint we were completely tapped out.



Eric Danos (left) and his brother Paul are executive vice presidents and third-generation owners of Danos Group. Photo courtesy of Danos Group

Fabrication is integrated with construction. In rough numbers, we need to double the size of our manufacturing capabilities. We will continue to run two shops in parallel."

The site selection's scope ranged from Mobile, Ala., to South Texas. Danos says the most important factors were access to the right work force, support from the state, and proximity to existing customers and to existing Danos locations. A formal RFI process was pursued for the HQ, and

will be for the manufacturing site as well. Danos says approximately three sites from Lafayette to New Orleans are under consideration, and Terrebonne Parish, where the

HQ is going, is one of those.

Danos says as the scope and complexity of projects the company takes on has increased, "we need larger-capacity lifts and waterfront load-out. We can build anything you can put on a truck, but we're landlocked. Part of the decision was to secure a waterfront location."

At the same time, that comes with inherent risk, he says. "We're doing pre-design work on creating a facility that can be storm-ready. We're anticipating that as part of our design specs."

The company is in the midst of firming up its engineering specs for that second RFI. "It's great for us because it's a blank slate," says Danos. "Like many companies, we've grown into a corner as we've grown. Now, end to end, we'll have a better product in a shorter time frame."

Clients are the biggest of the big: Chevron, Shell, BP and Exxon among them. Danos says as the industry moves farther offshore into deeper water and the higher pressures that come with it, "the size and scale and complexity increase in direct proportion. Specialized alloys are used more. Weight and dimensions are increasing. On all fronts, technology is increasing, which drives demand for different products." And clients pay for that high level of quality and service, whether it's in Gulf, the Bakken, Texas or West Africa.

Meanwhile, the company is allocating its resources earlier and earlier in projects, setting itself apart with its level of both technical sophistication and working relationships. "There's quite a bit of collaboration up the chain," Danos says of his team's work with the big oil companies and third-party engineering firms. "An integrative approach produces a better outcome."

Louisiana's economic developers couldn't have put it better themselves. ▼

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- ✓ 150 new jobs and \$450 million capital investment—Sundrop Fuels
- ✓ 600 new jobs and \$2.9 million capital investment—Sutherland Global Services
- ✓ 75 new jobs and \$120 million capital investment—Jeld Wen
- ✓ 30 new jobs and \$6 million capital investment—Weyerhaeuser
- ✓ 95 new jobs and \$3.9 million capital investment—UPS Midstream
- ✓ 190 new jobs and \$300 million capital investment—German Pellet Co.
- ✓ More announcements coming soon.

ENTREPRENEURSHIP FLOURISHED:

- ✓ \$170 million—increased revenue by BAS-coached companies
- ✓ 763—jobs created by BAS-coached companies
- ✓ 167—entrepreneurs coached by BAS
- ✓ 2—LA Small Business of the Year Awards by BAS-coached companies
- ✓ 937—participants in BAS workshops and seminars

AND...

- ✓ Central Louisiana Technical Community College was created
- ✓ A successful nationwide search for CLTCC chancellor was concluded
- ✓ Louisiana Workforce Roundtable was convened
- ✓ Summit on the Future of Public Higher Ed in Cenla was convened
- ✓ Start-up Weekend in Central Louisiana created and convened
- ✓ State of the Art research reports on the region's workforce published
- ✓ Active partnership with Louisiana Fast Start developed
- ✓ New investments and staffing for workforce needs
- ✓ New investments and staffing for business retention and expansion
- ✓ Louisiana Manufacturers Council convened & facilitated
- ✓ Central Louisiana Local Foods Initiative launched with \$750,000 in grant funds
- ✓ Listed in the "Top 25 Places to Retire" by Forbes Magazine for second straight year.

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The Perfect Storm Aftermath

New Jersey lays groundwork for rejuvenated economy following devastating losses caused by superstorm Sandy.

When Gov. Chris Christie and his family cut the world's longest ribbon for the grand reopening of the Jersey

Shore on May 24 in Seaside Heights, the event signaled more than the return of tourism to New Jersey's once-devastated coastline.

It marked the culmination of a series of initiatives designed to make the Garden State flourish once again with the humming sounds of industry.

Following the May 7 announcement that Hertz would relocate its headquarters from Park Ridge in Bergen County, N.J., to the Fort Myers area of Southwest Florida, New Jersey needed some positive news — and that's exactly what it got.

"This is an incredible day for New Jersey," the governor said as he, his wife Mary Pat and daughter Sarah cut a 5.5-mile-long ribbon to proclaim that the Jersey Shore was reopened for business after superstorm Sandy. "Mary Pat and I were here about seven months ago and saw the destruction of the boardwalk. You knew that if we all worked hard and worked together, we would get this done."

By the time Sandy dissipated last Oct. 31, it had killed 285 people and caused \$68 billion in damages — making the hurricane the second-costliest in U.S. history. Only Hurricane Katrina, which

by **RON STARNER**
ron.starner@siteselection.com

Christie and U.S. Housing and Urban Development Secretary announced HUD's approval of a \$1.83-billion plan to aid New Jersey's disaster recovery efforts.

Funded through HUD's Community Development Block Grant Program, New Jersey's action plan calls for the federal money to support a variety of housing, infrastructure and business activities.

These funds will be spent in addition to a special allocation of federal tax-exempt bonds that will aid states, municipalities and private businesses with the costs of repairing and rebuilding the Eastern Seaboard from storm damage.

The Hurricane Sandy Tax Relief Act of 2013 carves out specific relief measures and creates Hurricane Sandy Recovery Bonds. The state-by-state private activity bond allocation includes \$9.2 billion for New Jersey, \$9.2 billion for New York and \$3.2 billion for Connecticut.

Much of this aid will go toward repairing critical infrastructure such as docks and wharfs, commuter facilities, electric and gas energy production plants, and water, sewage and solid-waste treatment facilities.

Tracye McDaniel, president and CEO of Choose New Jersey

— the state's economic development marketing organization — says the various funding mechanisms will be a critical resource for business.



Gov. Chris Christie, First Lady Mary Pat Christie and their 17-year-old daughter Sarah cut the world's longest ribbon for the grand reopening of the Jersey Shore on May 24 in Seaside Heights.

Photo courtesy of Choose New Jersey

practically wiped out New Orleans in 2005, caused more financial loss.

The record-breaking ribbon-cutting occurred just three and a half weeks after



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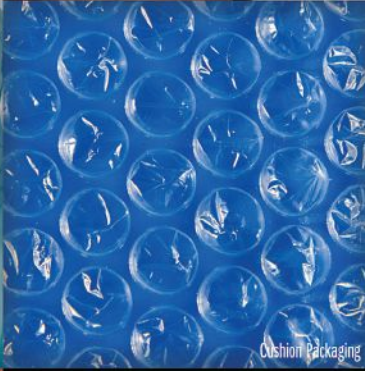
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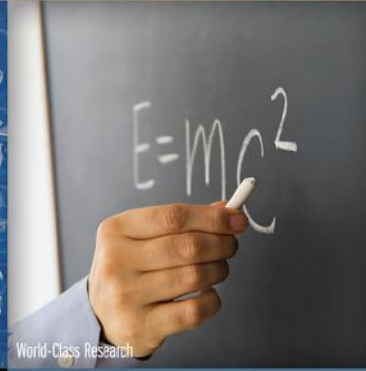
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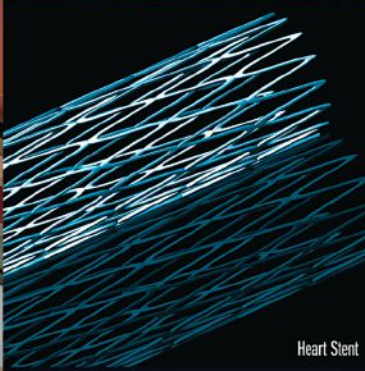
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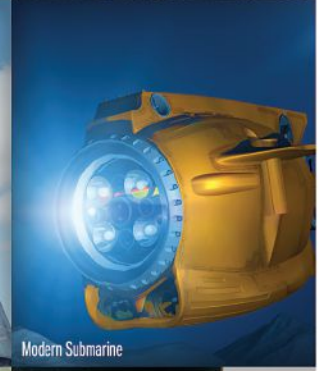
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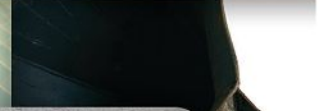
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“This is an incredible day for New Jersey.”

— Gov. Chris Christie as he cut the ribbon to reopen the Jersey Shore just in time for the summer tourist season

“The administration will be able to deploy this funding quite quickly,” she says. “It will provide Grow New Jersey Grant Program funding to any business impacted by the storm. They can apply for a grant up to \$50,000. We will help companies rebuild. We are also allocating \$25 million to market the Jersey Shore as being reopened for business. It is called ‘Get Your Happy Back’ and it will encourage travelers to come back to the Jersey Shore and support the local companies that are operating once again.”

Targeting Drones and Data Centers

John Boyd, site selection consultant and principal of The Boyd Company Inc. in Princeton, N.J., says the ongoing recovery effort “will be a meaningful boost in construction jobs. The tourism industry is huge in New Jersey. Beach replenishment is essential and fundamental to the Jersey Shore. Getting federal funds for ongoing help is necessary. Beaches need to be replenished just like highways need to be repaved.”

Boyd notes that Gov. Christie is doing other things to help businesses grow in the state. “New Jersey’s Urban Transit Incentive has been successfully utilized in the past, most notably for retaining Panasonic’s North American headquarters in Newark and more recently keeping the headquarters of Church & Dwight here in the Princeton area,” says Boyd.

“There are other projects out there, including ones like the federal government’s new Drone Testing Project being courted by states across the country,” he adds. “New Jersey is making a strong case leveraging the presence of a major FAA research center near Atlanta City, open airspace over the Atlantic Ocean and pine-lands of southern New Jersey, and aviation

studies and a new research park at nearby Stockton College.”

While New Jersey makes a bold play to win the drone project, the Garden State already flourishes in the highly competitive data center sector, notes Boyd.

“Data center operations are indeed a growth industry in New Jersey, principally



Telx opened its new \$200-million data center in Clifton, N.J., in Essex County on June 19. The co-location facility is the third major investment that Telx has made into its campus in northern New Jersey about 17 miles from Manhattan. Image courtesy of Telx

in those northern counties in proximity to New York City and the region’s huge financial community,” Boyd says. “The fact of the matter is that the huge demand for data center services by the region’s financial community is trumping those very real site selection drawbacks associated with New Jersey like high power costs, high land costs and exposure to super-storm Sandy-like weather disruptions.”

The consultant adds that “in the case of New Jersey, market forces carry the day, especially for third-party data center providers tapping this vast and highly concentrated New York/North Jersey metro area market. As we tell our clients, there is no perfect location. It is all about trade-offs.”

These days, more than a few data center operators are making the decision to choose New Jersey. According to a recent report by CB Richard Ellis, more than 4 million sq. ft. (371,600 sq. m.) of new data center space in 24 buildings has been developed in New Jersey since 2005, and that building trend continues.

“There has been a surge of activity in the data center field here,” says Choose New Jersey’s McDaniel. “One reason is our reliable power. Jersey server farms stayed on line during Sandy while Manhattan data centers went dark. PSE&G was just named the Best Utility in America. The state is doing its part to support data center operators, and our utility is making huge investments.”

Those investments paid off last year when **Telx** announced it would spend \$200 million to create a third data center facility at its Clifton, N.J., campus. On June 19, Telx opened the doors to its newest co-location complex, which will also be used as a future-technology incubator.

The 215,000-sq.-ft. (19,973-sq.-m.) building includes 110,000 sq. ft. (10,219 sq. m.) of data center space and uses 20 megawatts of power. Designed for LEED-Gold certification, it is Tier III certified by the Uptime Institute.

Incentive Shaved Construction Bill

Michael Terlizzi, executive vice president of engineering and construction for Telx, says his company selected the northern New Jersey location in order to be near the firm’s New York facilities.

“It comes down to proximity to network and the availability of power and scalability of power,” Terlizzi says. “We selected Clifton for redundancy and reliability of electric utility and the cost of power. And it is just far enough from our main installation to ensure business continuity in a disaster recovery situation.”

The Clifton campus of Telx is located in Essex County, N.J., about 17 miles (27 km.) from Manhattan.

“Certain aspects of the original building on this site made it attractive to us,” Terlizzi adds. “Its structural qualities and

ceiling height were good. We had signed our first lease here back in 2008 to serve as an annex to two major connection facilities in Manhattan — two of the largest interconnection facilities in the world.”

Telx opened 20,000 sq. ft. (1,858 sq. m.) of white space in 2009, “and then we did that again in 2010 and then again in 2011,” says Terlizzi. “We engaged our landlord to look at property on campus. Our landlord purchased the property and we built a brand new facility from the ground up. This is now New Jersey’s premier data center campus.”

Telx benefitted from an incentive that saved the company on the cost of construction.

“It was a tax relief of 3 percent that we saved on all construction-related activity on this property,” says Terlizzi. “Initially, we will have 20 dedicated employees just for this facility, but that number will grow. We are bringing online 15,000 sq. ft. [1,393 sq. m.] of data center space initially. As we add more customers, we will add more employees.”

Terlizzi says Telx has clients that rent anywhere from 10,000 sq. ft. of data center space to 100,000 sq. ft. (929 to 9,290 sq. m.). “Within five years, we should fill up this new space,” he says. “A lot of data centers are built by wholesale providers. We operate a retail model. We work with small and medium-sized businesses as well as larger ones.”

He adds that “New Jersey is growing in this sector. Our contractors are very busy. We are heavily engaged with our network providers. Their construction is at an all-time high.”

Other large data center operators that are expanding in New Jersey include **CommVault**, **Equinix** and **Savvis**. CommVault is a data storage company that recently announced plans to build a 650,000-sq.-ft. (60,385-sq.-m.) R&D complex that creates 1,500 new jobs in Oceanport.

Lt. Gov. Kim Guadagno says the state has adopted a number of measures to make corporate facility expansion projects more easily attainable in New Jersey. She noted recently that the state passed \$2.35 billion in tax cuts and reforms to benefit private-sector employers that are seeking to grow in the Garden State, while also passing a 2-percent property tax increase cap.

HQ Central: Projects Proliferate

Since April, the state has welcomed the following expansions:

- **Thales Avionics Services** opened a new plant in Piscataway, creating or retaining a total of 200 jobs.
- **Burlington Coat Factory** broke ground on a new \$41-million Florence Township headquarters to house 800 workers, including 120 new hires.
- **Prologis** broke ground on a new distribution center in Jersey City that will retain and create 810 jobs.
- **Ascena** and **Dress Barn** announced they will invest \$53 million in a new headquarters and bring 575 new jobs to Mahwah.
- **Novo Nordisk** opened a new \$225-million, 731,000-sq.-ft. (67,910-sq.-m.) U.S. headquarters that will employ 1,000 workers in Plainsboro.



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“We selected Clifton for redundancy and reliability of electric utility and the cost of power.”

— Michael Terlizzi, executive vice president of engineering and construction for Telx

- **DRG International** opened a new 35,000-sq.-ft. (3,251-sq.-m.) Springfield headquarters that is expected to employ 100 workers.
- **Quantex Laboratories** opened a new 15,000-sq.-ft. (1,393-sq.-m.) Cranbury headquarters.
- **Church & Dwight** opened a new 250,000-sq.-ft. (23,225-sq.-m.) global headquarters in Ewing Township – a \$70-million investment that employs more than 500 people.

McDaniel says that the Christie-Guadagno administration will remain aggressive in its approach to economic development. She notes that the state has offered incentives to pharmaceutical companies even as they were downsizing.

“We offered an incentive to hire and train former pharmaceutical workers,” McDaniel says. “We will reimburse 50 to 90 percent of their salary up to \$14,000 in the first year. Plus, our Angel Investor Tax Credit Program started in June. It provides up to 10 percent of a qualified investment tax credit for firms conducting

research or related activities in biotech, advanced materials, IT, medical device technology or renewable energy.”

McDaniel says these investments are paying off. “Since 2010, we have increased our employment in the private sector by more than 130,000 jobs,” she says. New Jersey’s unemployment rate reached a four-year low of 8.7 percent in April.

Boyd applauds these measures and says the state must “continue to fight the good fight of reducing taxes — especially crippling property taxes — and make smart infrastructure investments like those associated with Port Newark/Port Elizabeth trade and the growth of the logistics industry in the state.”

The consultant also notes that “Christie cannot make New Jersey more business-friendly by himself. He needs the help of the state legislature. Today, our clients, especially in Blue States like New Jersey, are heavily engaged in local legislative races looking for reformers to hold the line on out-of-control state spending, pensions and taxes.”

Boyd cites the huge **Amazon** distribution center in Robbinsville as a case in point. The \$200-million capital investment that creates 700 new full-time jobs came about after the global online retailer negotiated a two-year sales tax holiday with the state.

“The New Jersey business community is especially energized with the return of former banker and state Sen. Pete Inverso in the 14th District,” says Boyd. “This is where Amazon just announced its first New Jersey fulfillment center. Inverso is an ally to Christie and his tax and spending reforms.”

If the governor can successfully recruit more such allies to serve in the legislature, real reform can be expedited, notes Boyd.

“Again, Gov. Christie cannot turn around the Queen Mary alone,” says Boyd. “Like other business climate reformers like John Kasich in Ohio, Mitch Daniels in Indiana and Rick Scott in Florida, close cooperation between the governor’s office and the legislature is essential for success.”

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Industrial giants mark 10 decades in eastern Tennessee with major new expansions.

Nashville in central Tennessee, Union City in the state's far northwest and several other communities have claimed important new capital investment projects in 2013. **Sony/ATV Music Publishing** is adding 50 to 60 new jobs in state capital Nashville, and **Williams Sausage Co.** is adding nearly 150 new jobs at its Union City, Obion County, headquarters.

But it's eastern Tennessee — better known for its tourism attractions in and around the Great Smoky Mountains than its industrial base — that is attracting the lion's share of investment in the Volunteer State so far this year. On May 29th, **Eastman Chemical Co.** Chairman and CEO Jim Rogers and Tennessee Governor Bill Haslam announced "Project Inspire" that over the next seven years will see Eastman invest \$1.6 billion in its Kingsport site and create 300 new jobs in Tennessee. The project will enable the company to invest in, among other things, new growth opportunities, safety and environmental projects, increased warehouse capacity, building renovations and expansion of its corporate campus.

"This represents a landmark capital investment that will modernize and expand our largest manufacturing site and corporate campus here in Kingsport," said Rogers. "This multi-year project will culminate in Eastman's 100th anniversary in 2020. I can think of no better way to honor our long-term commitment to this site and surrounding community than through this very significant investment in our future." The state will provide funding to support the corporate campus expansion, road infrastructure improvements for the project,

and a grant to meet advanced manufacturing training needs for the company through the Regional Center for Advanced Manufacturing located in Kingsport.

Also in Kingsport, **Leclerc Foods** is investing more than \$15 million in its facility, where it makes granola bars, crackers and cookies, and adding 40 jobs to its payroll. The Canadian company also operates plants in Pennsylvania and in the Canadian provinces of Ontario and Quebec. "The quality of the local suppliers, the skilled work force and the good collaboration of all the local authorities has really created a good business environment for us," says Francois Gingras, director of engineering.

Innovation Valley Investments

Blount County, south of Knoxville, is another eastern Tennessee region where another industrial giant with a 100-year history in the state is expanding. **Alcoa** announced in May a \$275-million investment over the next three years at its rolling mill in Alcoa, resulting in 200 new jobs. The company is seeing sharp demand for light, durable and recyclable aluminum for use in automobile production.

"More and more auto producers are turning to aluminum to increase the fuel efficiency and quality of their vehicles," noted Chairman and CEO Klaus Kleinfeld at the expansion announcement. "We anticipate a quadrupling of auto sheet volume by 2015 and a tenfold increase by 2025."

Earlier in the year, **ProNova Solutions**, a developer of cancer treatment technologies, announced its decision to locate in

by MARK AREND

mark.arend@siteselection.com



Photo courtesy of Tennessee Department of Tourist Development

Panther Creek State Park is in Morristown, Tenn., midway between Kingsport and Knoxville. Both eastern Tennessee cities are seeing new investment from long-time corporate citizens Eastman Chemical Co. and Alcoa respectively.

the new Pellissippi Place technology research and development park in Maryville, in the heart of the Oak Ridge Corridor/Innovation Valley. The \$52-million investment is forecast to create 500 jobs by 2018, but that number is expected to grow substantially in subsequent years.

Proximity to the Dept. of Energy's Oak Ridge National Laboratory and its many technology resources, including the Spallation Neutron Source and High Flux Isotope Reactor, is a key draw to companies like ProNova Solutions.

"This type of technology is what the leaders of Innovation Valley have been striving to bring to this area," noted Dr. Thomas Mason, director, Oak Ridge National Laboratory, at the February 21st announcement. "This location in Pellissippi Place shows our dedication to companies that see the value of the work force and quality of life in the Innovation Valley." ▼



Mission Accomplished

An Australian company joins Oklahoma's aerospace cluster as the state prepares for a coming boom in the unmanned aerial systems sector.

Governor Mary Fallin returned from Le Bourget Paris Airshow in June with a commitment from Australian aerospace supplier **Ferra Engineering** to locate an operation in Grove, in the northeast corner of the Sooner State. The company, which plans to hire 20 engineers, specializes in the custom design, manufacture, assembly and test of aerospace structures and sub-systems. It also produces medical devices for the healthcare industry, as well as components for renewable energy systems.

Ferra Engineering joins a vibrant aerospace sector in the state — the Oklahoma Aerospace & Defense Alliance has more than 300 member companies, mostly clustered in the Tulsa and Oklahoma City metros.

“Ferra chose to expand to Oklahoma because its central location enables us to easily provide service to our customer base on both coasts and international markets,” said Mark Sherrer, CEO, at the June 18th announcement with Gov. Fallin in Paris. “Oklahoma’s competitive cost structure, business friendly environment and strong existing aerospace supply chain made it a natural choice.”

Ferra supplies leading aerospace companies such as Airbus, BAE, Boeing, EADS, GE Aviation, Thales, Goodrich, Lockheed Martin, Marvin Engineering, Northrop Grumman, Pratt & Whitney, Raytheon, and Rolls-Royce. Key projects the company has worked on include the F-35 Lighting II, the Airbus A380,

by **MARK AREND**
mark.arend@siteselection.com

the Eurocopter TIGER and NH90, and the Boeing 747, 757, 767, F-18, CH-47, P-8, and JDAM ER.

The Other Aerospace Industry

Oklahoma’s aerospace industry will have as much to do with unmanned aerial systems (UAS) as with piloted aircraft, according to analysis unveiled in January by Gov. Fallin, Secretary of Science and Technology Stephen McKeever and Michael Toscano, president & CEO of the Association for Unmanned Vehicle Systems International (AUVSI). The analysis says Oklahoma is poised to create nearly 600 new jobs in the first three years following the integration of Unmanned Aerial Systems (UAS) into U.S. airspace. Meanwhile, beyond the first three years, Oklahoma stands to capture hundreds, and perhaps thousands, of additional new jobs by 2025.

The data come from a forthcoming AUVSI-commissioned study examining the national and state-by-state economic impact and job creation potential resulting from the UAS integration into national airspace, which is expected to occur by 2015.

“UAS represents one of the fastest-growing segments of the aerospace industry, which already is an important part of the Oklahoma economy,” Fallin said. “We are taking the steps necessary to create an environment conducive to job creation and investment that also positions Oklahoma as a national leader in the advancement of UAS technology. We’re excited the data from AUVSI’s economic impact report show Oklahoma is poised to add

hundreds of jobs and see millions of dollars in economic impact as UAS is integrated into the national airspace.”

Fallin created the Unmanned Aerial Systems (UAS) Council in 2011, which has since produced a strategic roadmap to help make Oklahoma the “go-to” place for UAS research, development and testing.

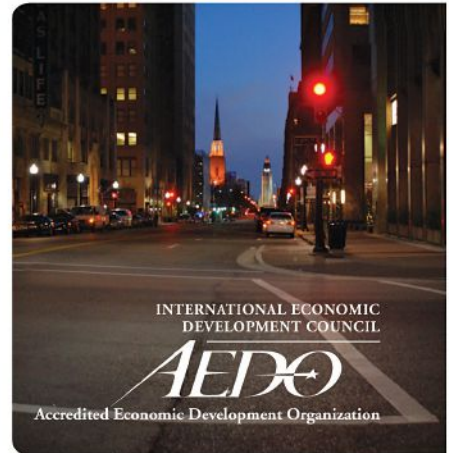
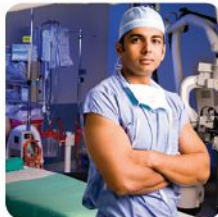
“Oklahoma is positioning itself to be a hub for innovation

Unmanned aerial systems, like the military drone shown here, are a critical part of Oklahoma's aerospace industry in the future, bringing the potential of thousands of high-wage jobs to the state.



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The National Weather Service complex at the University of Oklahoma in Norman is an economic driver for the state and a paradigm of how academia and the public and private sectors can collaborate successfully. For more on this facility, see the Technology Centers feature on page 84.

Tax Cuts, Workers' Comp Reform Measures Enacted

Oklahoma's business climate took two steps forward in May with two measures signed into law — one reducing income tax rates and the other reforming the state's workers' comp system.

On May 13th, Governor Mary Fallin signed into law House Bill 2032 that cuts the top income tax rate from 5.25 percent to 5.0 percent on January 1, 2015. It would cut the rate further, to 4.85 percent, in 2016. Once fully realized, the tax cut would pump \$237 million into the private sector. Fallin said the income tax cut was an important tool for job creation and economic development.

"One of the first questions I get when I am talking to business owners throughout the country is, 'If I come to Oklahoma, are you going to raise my taxes?'" Fallin said. "Passing a significant and responsible tax cut will help us to recruit these businesses and retain the ones we already have. Our tax cut will ultimately lead to more job opportunities for all Oklahomans."

Fallin said the tax cut will help to offset recent tax hikes enacted by the federal government.

"Oklahomans have already seen their paychecks decrease, beginning in January of this year, thanks to Washington's tax hikes," she said. "Cutting our state income tax will help to offset that loss, and help working Oklahomans keep more of their hard-earned money."

The second cut, bringing the rate to 4.85 percent in 2016, is contingent on total revenue growth in FY 2016 being equal to or greater than the fiscal impact of a 0.15 percent tax cut. Fallin said including that language in the bill ensures that Oklahoma does not lose the revenue it needs to fund key government services.

"We want to cut taxes responsibly," Fallin said. "No one wants to starve state government of the resources it needs to fund priorities like education. The language of this tax cut bill was crafted in a way to ensure that we have enough growth revenue to pursue

a significant tax cut."

The bill also provides for a total of \$120 million to fund repairs to the Oklahoma State Capitol beginning this year.

On May 6th, the governor signed into law Senate Bill 1062, which reforms the workers' compensation system in Oklahoma. The bill, by Senate President Pro Tem Brian Bingman and House Speaker T.W. Shannon, seeks to reduce costs for businesses. It moves the state from a court-based workers' compensation system to an administrative system, allowing for more timely processing of claims and reducing the adversarial nature of the process for both workers and employers.

"For decades, Oklahoma has had one of the most expensive and inefficient workers' compensation systems in the country, a constant obstacle for business owners looking to expand operations or create more jobs," Fallin said. "Senate Bill 1062 completely overhauls our flawed workers' comp system, dramatically reducing the costs to businesses and freeing up private-sector resources that can be invested in jobs rather than lawsuits. Additionally, our reforms ensure injured workers are treated fairly and given the medical care needed to return to work. This is an important pro-growth policy that will help us attract jobs and build a stronger and more prosperous Oklahoma."

Bingman, R-Sapulpa, said, "Oklahoma's runaway workers' compensation court has been the number one roadblock to job growth for decades, and today, we're finally putting the brakes on these costs. Replacing our broken workers' compensation system is historic. The Administrative Workers' Compensation Act sends a clear signal to job creators that Oklahoma is truly open for business. This bill is especially needed to help us control the year-to-year fluctuation of costs, and to help us compete for good manufacturing jobs while making sure injured workers are treated fairly."

and growth in the UAS field by building strong academic R&D programs at our state universities and by establishing leading Test and Evaluation facilities and infrastructures through public-private partnerships. New technologies, capabilities and an educated and experienced work force are the result,” said Dr. Stephen McKeever, Oklahoma Secretary of Science and Technology.

“Under Governor Fallin’s leadership, Oklahoma is well-positioned to reap the economic benefits that will come along with the expanded use of UAS technology,” said Michael Toscano. “Oklahoma has the infrastructure in place to support the development



Sunrise at Broken Bow Lake in the Ouachita National Forest in McCurtain County, in southeast Oklahoma.

of UAS technology, as well as several industries — such as agriculture and the oil and gas industry — that could one day benefit from the technology. Moving UAS technology forward can improve our quality of life while creating high-quality

American jobs, especially right here in Oklahoma.”

Specifically, the study finds:

- Based on the current UAS activity in Oklahoma, the state is projected to create 593 new jobs in the first three years — from 2015 to 2017 — following the integration of UAS into the U.S. airspace. This number includes both direct and indirect manufacturing jobs.
- Over those same three years — from 2015 to 2017 — the total economic impact to the state is projected to be \$57.6 million. Economic impact includes the monies that flow to manufacturers and suppliers from the sale of

Photo by Lisha Newman, courtesy of the Oklahoma Tourism & Recreation Department

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* Associated Press Economic Stress Index for March 2011

new products as well as the taxes and monies that flow into communities and support the local businesses.

- Oklahoma is poised to add hundreds, and perhaps thousands, of additional new jobs by 2025. That's because the study projects there will be 105,685 new jobs nationally by 2025 as a result of the integration, and many of these jobs are portable. They aren't committed or tied to any particular state.
- Future events — such as the establishment of test sites and the adoption of UAS technology by end users — will

ultimately determine where many of these new jobs flow from 2017 to 2025.

Oklahoma's aerospace industry and infrastructure, including restricted airspace, companies already developing UAS technology and research institutions, strongly position the state to capture additional jobs beyond 2017. Also, Oklahoma's top industries — including agriculture and oil and gas — are expected to be among the biggest end users of UAS technology. As these industries adopt and deploy UAS in the state, more new jobs could follow.

Across the country, the agriculture sec-

tor is expected to be the largest market for UAS technology, the AUVSI study finds. UAS will allow farmers to more efficiently monitor crops and distribute pesticides, which could help improve efficiency among the state's 86,000 farms and maintain the state's position as a national leader in wheat production.

The oil and gas industry is another industry that sees tremendous potential for using UAS technology. Many major oil companies have expressed interest in using UAS to more efficiently survey pipelines, drilling rigs and other critical infrastructure.

Oklahoma has been a national leader in UAS advancement. Last year, the Department of Homeland Security selected Fort Sill to test small UAS for public safety purposes such as search and rescue and disaster response.

"The fact that companies from around the country have come to Oklahoma to test their technologies shows the potential return on Oklahoma's investment in UAS infrastructure," said Toscano.

The economic data represent the preliminary findings of the AUVSI economic impact study, which will be finalized in the coming weeks. The report was commissioned by AUVSI and developed by Darryl Jenkins, a past professor at George Washington University and Embry Riddle Aeronautical University, and an aviation industry economist with more than 30 years of experience. Mr. Jenkins is the author of the Handbook of Airline Economics and previously served as the director of the Aviation Institute at George Washington University in Washington, D.C. ▼



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Key Projects of 2013

ENID: Koch Nitrogen Co. LLC is investing \$1 billion in a new fertilizer production facility that will be operational in 2016. The project will generate hundreds of construction jobs and 30 permanent positions.

OKLAHOMA CITY: General Electric is investing \$110 million in a global research center that will require 125 high-tech engineering jobs initially. The center will support GE Oil & Gas, the company's fastest-growing business.

TULSA: Verizon is adding 500 new jobs to its North Lakewood facility where it already employs about 900. The company cited Oklahoma's strong supply of financial services talent as a key reason for expanding in the state.



Certifiably Ready

The nation's first 'work ready' community has overcome more in the past two years than most communities will have to in a lifetime.

Jasper County, Mo., is the nation's first Certified Work Ready Community (CWRC) — a designation of American College Testing (ACT), the Iowa-based nonprofit organization that administers the ACT college admissions exam taken by more than 1.6 million high school students each year.

That in itself is impressive, given the growing number of communities in Missouri and other states that are working to earn the designation. But the county seat of Jasper County is Joplin, where a catastrophic EF-5 tornado struck on May 22, 2011, causing about \$3 billion in damages and more than 150 deaths.

In 2012, Missouri was selected as one of the first four states to participate in the CWRC initiative by ACT. The initiative aligns work-force training programs with the economic development needs of communities; matches appropriate applicants to jobs based on skill level; and strengthens businesses by strengthening the work force. More than 80 local employers, educational institutions, and work-force development organizations supported Jasper County's efforts to achieve this important certification.

Statewide, more than 740 Missouri businesses are supporting the state's CWRC initiative, according to Debra Lyons, ACT's vice president, community and economic development and workforce development.

The significance of this designation cannot be overstated. It signals to potential capital investors that Jasper County is (1) helping workers understand what skills

by **MARK AREND**
mark.arend@siteselection.com

are required by employers, and how to prepare themselves for success; (2) helping businesses effectively communicate their work-force needs to area education and work-force training programs; (3) providing educators with the tools needed to



Gov. Jay Nixon congratulates Jasen Jones, executive director of Southwest Missouri's Workforce Investment Board, on Jasper County becoming the nation's first Certified Work Ready Community in March.

close the skills gap by establishing career pathways for students with stackable industry-recognized credentials; and (4) equipping economic development organizations with an on-demand reporting tool to promote the quality of their work force.

'Stronger and Smarter Community'

"For Jasper County, home to the Joplin metro area, to become the very first ACT

Certified Work Ready Community in the nation is another testament to this community's resilience and its commitment to rebuilding its economy stronger, and smarter, than ever before," said Gov. Jay Nixon at a March 8 event in Joplin announcing the CWRC designation. "Congratulations to Jasper County for being the first community in the country to achieve this certification, and for demonstrating that the workers here have the skills and training necessary to compete — and win — in the global economy."

Jasen Jones, executive director of Southwest Missouri's Workforce Investment Board, is a leading driver of the county's and region's participation in ACT's National Career Readiness Certificate program, which has been under way since 2006.

"The tornado put things on hold somewhat with respect to work we wanted to get involved in on the Certified Work Ready Community effort," he recalls. "We were about to launch NCRC at the high school level, and several school buildings were destroyed, so we needed to get some stability there, which was the case by the time school started again in August 2011."

Post-tornado temporary workers also benefitted from the area's participation in NCRC, Jones relates.

"Through recovery grants our office secured, we made sure that the several hundred temporary workers here were equipped with NCRC as well. The disaster recovery grant we got from the Department of Labor was designed to put them to work and then get them permanently placed later on. So that helped those work-

ers long term as well as short term.

“For the recovery effort citywide,” adds Jones, “the Citizens Advisory Recovery Team included Work Ready Communities as one of their recovery goals, because they knew Joplin was getting a lot of national attention on the recovery side, but wanted to become one of the first in Missouri, if not in the country, to get in that national spotlight with the message that Joplin is open for business and its work force is stronger than ever. So work force had a main role in Joplin’s recovery effort.”

Offsite HR Department

Joplin-based Able Manufacturing & Assembly LLC recruits in southwest Missouri and in neighboring Kansas and Oklahoma — 30 percent of the contract manufacturer’s employees are from outside Missouri, says Susan Adams, director of human resources. The state labor agencies in all three states administer the NCRC test so that, regardless of where a candidate comes from, he or she has taken a standard skills assessment.

“We have a fairly small HR department, so the people who meet the qualifications for our jobs are vetted before they ever come here.”

—Susan Adams, director of human resources, Able Manufacturing & Assembly LLC

“This way, I have a good, standardized baseline of their math, reading and locating information [skills], and we have recently added another, workplace observation, for some of our jobs,” says Adams. “This is an indicator of how well a candidate will respond to on-the-job training, whether they are able to learn through observation.”

Able Manufacturing & Assembly is unique, certainly fortunate, in that the three states in which it recruits use this work-force methodology, Adams notes. “We have a fairly small HR department, so the people who meet the qualifications

Notable 2013 Projects

Monsanto will invest more than \$400 million at its Chesterfield Village Research Center near St. Louis, creating 675 jobs over the next three years. The company will add a new research building, 36 greenhouses and 250 laboratories to facilitate development of its seed and trait pipeline.

Building materials maker **CertainTeed** announced in April that it will invest \$100 million in a Landmark™ shingle manufacturing and distribution center in Jonesburg, on I-70 west of St. Louis. The project will create about 100 new jobs.

Yanfeng USA Automotive Trim Systems will build a new \$45-million production facility in Riverside, near Kansas City, adding about 260 new jobs to the area’s automotive sector. A subsidiary of Yanfeng Visteon, the company is a major supplier to General Motors, Chrysler and other OEMs.

for our jobs are vetted before they ever come here. My HR staff isn’t having to go through stacks of applications. Candidates have already met the job requirements, and then with the NCRC we are able to verify their basic skills.”

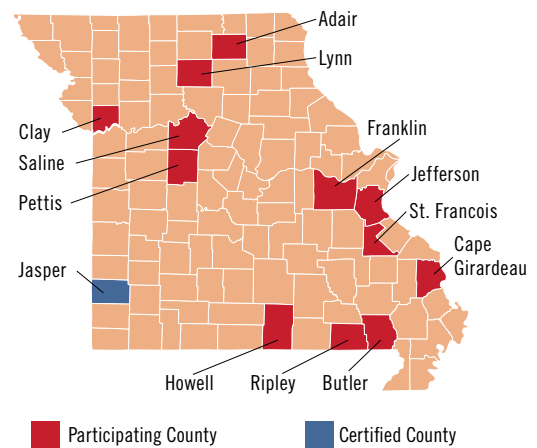
Able Manufacturing is an ISO 9001 company, making its documentation intensive with procedural instructions to ensure that repeatability and standardization of processes is maintained.

“That all goes out the window if a person doesn’t have adequate reading skills,” says Adams. “They need to read a bill of materials and understand the complexities of each unit they’re building.” The company makes truck and crane cabs, train exteriors and interiors and a range of industrial equipment. It maintains a staff of about 325 at three facilities — two in Joplin and one in Pittsburg, Kan.

Adams credits the area’s spirit of collaboration as the force behind Jasper County’s Certified Work Ready Community designation — tornado or not. The business community, school administrators and work-force agencies all appreciate the importance of a certified, qualified work force to the area’s future prosperity — a point she says that was made abundantly clear the day Gov. Nixon came to town to recognize the community for its Work Ready Community status.

Meanwhile, she relates, “Joplin’s new high school, currently under construction, will be a career path school where the students will elect a career path early on, and their elective classes will be tailored to that career path. The students will be focused on a career from the beginning of high school. Many of them will go on to higher education and will have taken the

ACT. But those that go directly into the work force will have the NCRC, preparing them for the work force.”



Top Performing Counties

- 1) JASPER..... 100%
- 2) FRANKLIN..... 82%
- 3) RIPLEY..... 81%
- 4) ST. FRANCIS..... 74%
- 5) NEWTON..... 64%

Reaching the goal of being named a Certified Work Ready Community required collaboration of the high school; higher education institutions, including Missouri Southern State University, Crowder College, Carthage Technical Center and Lamar Area Vo-Tech; a minimum number of businesses indicating support; and state labor agencies, says Adams.

“It’s a very collaborative community, which is why we have come through the ordeal of the tornado the way we have,” she says. “Building these relationships has been a conscious effort of the community since well before that.” ▼



Faith, Fire And Falcons

Arkansas is a lot more than ground zero for everyday low prices.
Three companies explain why.

by **RON STARNER**

ron.starner@siteselection.com

What do the world's largest retailer, an entrepreneurial steel industry executive and a French jet manufacturer all have in common?

A lot of faith in the Arkansas work ethic. The biggest economic development news in Arkansas these days revolves around three companies: **Walmart**, **Big River Steel** and **Dassault Falcon Jet**. Collectively, these three behemoths stand to permanently change, for the better, the economic landscape of The Natural State.

Earlier this year, Walmart announced that it will boost its sourcing of U.S.-made goods by \$50 billion over the next 10 years — a commitment that's sure to lengthen the hiring lines at many American factories and precipitate more than a few plant re-shoring decisions.

In an exclusive interview with Site Selection, Greg Hall, vice president of U.S. sourcing and manufacturing at Walmart U.S., says that the world's No. 1 retailer will work with the federal government and various state governments to attract more manufacturing plants back to the U.S.

"Walmart can work with manufacturers to facilitate important government meetings to explore benefits, rebates, training and other programs available to attract U.S. manufacturing state by state," Hall says. "Walmart has relationships with local, state and federal government organizations and we're willing to facilitate meetings with manufacturers and other key groups."

Hall says Walmart's pledge stands to benefit Arkansas substantially. "In May, Walmart partnered with Gov. Mike Beebe to launch a program in Walmart stores called 'Arkansas' Own,' highlighting consumer products created, processed and produced in the state. Walmart's goal is to create awareness and drive consumer interest in Arkansas products and help the vendors and suppliers in our home state."

Walmart carries more than 1,700 items that are made in Arkansas. Those products include 73 brands from 44 suppliers, ranging from household names like Tyson, Gerber, Stouffers and Huggies to smaller, lesser-known brands.

While the Walmart Buy American campaign may take a while to jumpstart factory expansions locally, one project



Dassault Falcon Jet announced May 29 that it will invest \$60 million into expanding its aircraft assembly plant in Little Rock.

Photo courtesy of Dassault

It's a story of faith, fire and the mighty Falcon.

Of course, when you're a \$470-billion company that employs 2 million people around the world, it's easy to have faith, but in this case the Bentonville, Ark.-based Walmart is expressing a newfound belief in the industriousness of the American factory worker.

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 **ARKANSAS**
A natural for business

that’s sure to create a widespread ripple effect throughout the Arkansas economy is the appropriately named Big River Steel plant in Osceola in Mississippi County.

Big River Steel LLC announced Jan. 29 that it will build a \$1.1-billion steel mill that will employ more than 500 workers at an average annual wage of \$75,000. The state won the project by offering a \$125-million bond package that includes a \$50-million loan to Big River Steel; \$50 million for site preparation; \$20 million for costs associated with piling; and \$5 million for the cost of the bond issuance.

“This is the largest deal in the history of Arkansas,” says Cliff Chitwood, economic developer for Mississippi County. “The site is located on the lower Mississippi River. We actually began marketing it about a decade ago. ThyssenKrupp looked at it years ago before they chose Mobile, Ala.”

John Correnti, CEO of Big River Steel and formerly with Nucor, tells Site Selection that the 1,300-acre (526-hectare) site met every one of his location criteria for the project.

“First is access to my market, my customers. Arkansas has a lot to offer. It is almost smack dab in the center of the U.S. Second is access to raw material,” he says. “We have to bring in close to 2 million tons of raw material — mostly scrap metal and some pig iron. Freight cost is only \$5 a ton by barge, compared to \$45 to \$50 a ton by truck. Third is power. We will use 400 megawatts of electricity, and so rates are critical. We must have reliable and economical electrical power rates. Here, we will have access to a very economical rate through the Entergy Arkansas Corp.”

The Arkansas Public Service Commission approved the proposed rate package for Big River Steel on May 16. Mike Maulden, director of external affairs for Entergy Arkansas, says that the electric contract “is not a standard tariff. Entergy and BRS negotiated it over a few months and submitted it to the PSC, which then issued its approval. We also need approval to build the substation and transmission line.”

If all goes as planned, construction should begin in August or September, he says. The plant, expected to generate 2,000 construction jobs, is scheduled to open in the summer of 2015.

Flying High

Mississippi County and the City of Osceola chipped in with incentives too. The city package came to \$2 million, while the county offered \$12.4 million. Other crucial location factors, according to Correnti, included natural gas costs, rail and highway access, and the availability of a qualified work force.

“We looked at about 55 sites,” he says. “We looked at Texas, Mississippi, Tennessee, the Carolinas, and up and down the Mississippi River. Big Muddy was very attractive to us.”

Grant Tennille, executive director of the Arkansas Economic Development Commission, says BRS started out looking at 10 states. “It came down to two sites in Arkansas and one in Mississippi before they selected the site in Osceola,” he says.

Tennille celebrated more big news May 29 when Dassault Falcon Jet announced plans to increase the size of its completion center in Little Rock to accommodate final assembly of more Falcons. Over the next three years, the French company will invest \$60 million into the capital city facility. The 250,000-sq.-ft. (23,225-sq.-m.) expansion will bring the total Dassault footprint in Little Rock to 1.25 million sq. ft. (116,125 sq. m.) and could add up to 300 jobs at the plant. ▼



Infrastructure Team Will Expedite Northwest Energy Projects

Collaborative processing will help spur projects, create jobs.

by MARK AREND

mark.arend@siteselection.com

Secretary of the Interior Sally Jewell signed a Declaration of Cooperation with Oregon and Washington on May 24th to expedite the review and permitting of energy generation, power transmission and other vital infrastructure development in the Pacific Northwest.

“By cutting red tape, expanding information technology tools and conducting concurrent state and federal reviews, we can trim months, if not years, off the time it takes to review and approve projects,” said Secretary Jewell. “We will continue to ensure that vital infrastructure is designed, built and maintained in a way that protects public health, safety and the environment, while creating jobs and expediting economic growth.”

According to a Department of the Interior press release, the agreement formally establishes a pilot Pacific Northwest Regional Infrastructure Team to more efficiently coordinate the permitting processes for infrastructure projects — where both state and federal agencies have review responsibilities. This state-federal team will use a cross-agency and cross-jurisdictional strategy to identify siting conflicts and mitigation early in the development and permitting process.

The infrastructure team will focus on a variety of projects, including renewable energy generation, electricity transmis-



Longtime port tenant Tesoro in April announced plans to construct and operate a crude oil handling facility at the Port of Vancouver USA, located in the State of Washington near Portland, Ore. In a joint venture with the logistics company Savage, Tesoro is proposing to bring North American crude oil to the port by rail where it would then be transferred to marine vessels for transport to refineries in such places as California, Washington and Alaska. Port and other officials are reviewing the proposal.

sion, broadband, pipelines, ports and waterways and water resource development that are proposed in the states. The team will also be a forum for innovation in early identification of effective mitigation integrated across agencies as an important element of a successful integrated permitting strategy.

The formation of the pilot Pacific Northwest Regional Infrastructure Team builds on a successful partnership model with California, where the Interior Department and the state identified joint

policy priorities for renewable energy, established a joint forum to resolve permitting and siting conflicts, and achieved significant project development, while protecting critical wildlife and cultural resources.

Oregon, Washington Governors React

Pacific Northwest States have already taken steps to spur infrastructure investment and expedite their permitting processes. In Oregon, Governor John

“With this new initiative, we can accelerate development of important energy and infrastructure projects that will create jobs and economic growth in our region.”

— Washington Governor Jay Inslee

Kitzhaber’s December 2011 Executive Order 11-12 established the Oregon Solutions Network to promote collaborative governance by using a cross-sector approach to respond to challenges and opportunities that lead to statewide and re-

gional solutions. In November 2012, Gov. Kitzhaber issued Executive Order 12-17, which called upon state agencies to look at the full life-cycle costs of infrastructure and state capital facilities investments, including climate risk. The governor also

released a 10-Year Energy Action Plan that outlines strategies to meet energy efficiency, renewable energy, greenhouse gas reduction, and transportation objectives, with goals to enhance clean energy infrastructure development by removing finance and regulatory barriers to attract new investment and pursue promising new technologies in 2012.

“With today’s announcement federal and state agencies will work more collaboratively, reducing the time required to make significant permitting decisions while also improving environmental and community outcomes,” said Gov. Kitzhaber May 24th. “This agreement embodies the kind of change necessary to accelerate our economic recovery, and restore the shared prosperity of our states.”

In Washington, Governor Jay Inslee is working to modernize state regulatory systems to create and sustain a thriving economic climate that spurs job growth. State agencies in Washington are examining how they can remove barriers and support economic development efforts, including the reform of regulatory and permitting processes.

Historically, affordable electricity has helped industries across the state, and Gov. Inslee’s plan is to ensure the State remains at the forefront of clean energy innovation and development. State agencies are also addressing infrastructure improvements to provide long-term economic growth because businesses need to move products efficiently and reliably across highways, railways and ports.

“The Pacific Northwest Regional Infrastructure Team represents an exciting opportunity for our state to engage with federal and regional partners to streamline and expedite regulatory processes,” said Gov. Inslee. “With this new initiative, we can accelerate development of important energy and infrastructure projects that will create jobs and economic growth in our region. I’d like to commend President Obama and Secretary Jewell for their vision of collaboration on infrastructure development, in the Pacific Northwest and around the country.” ▼

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Zones of Opportunity: Experiencing a Net Gain

It's been said that sometimes you need to "give a little" to "get a little." When it involves economic development site selection, giving of incentives can be tough, but the getting can be great and, in the end, if you get more than you give, you're experiencing a net gain. That gain equates to real jobs, taxable revenues and stabilization of many communities throughout the U.S.

Zones of opportunity exist across the United States as a means of bolstering local capital investment and job creation through the provision of incentives. They allow that "give and get" equation to provide substantial returns to communities through reinvestment and creation of jobs in areas targeted for reinvestment and stabilization. There are multiple zones developed throughout the U.S. and they go by many names, including: Renaissance Zones, Enterprise Zones and Keystone Opportunity Zones. Additional local zones such as Tax Increment Financing Areas, Tax Free Areas and Federally-Designated Areas exist to entice redevelopment of identified areas of need.

Generally, all zones provide some form of tax break or exemption and are given enhanced economic advantages as an inducement to locate there and employ residents. Whether the reason is due to loss of employers, property degradation or declining popu-

by **COURTNEY DUNBAR**
CEcD, EDFP, Economic Development
Leader, Olsson Associates

lation, these zones offer companies simplicity and clarity of benefits through packaged incentives crafted to entice development within the zone.

The benefits offered within special opportunity zones across the U.S. align squarely with siting and location considerations listed as most critical by site selectors and end-users. Beyond the additional capital investment and job creation through new investment, communities can experience some

surprising benefits that lead to bottom-line gains as well.



A solar array at Dow Corning headquarters in Midland, Mich., where a Renaissance Zone for renewable energy created in 2010 welcomed a \$165-million solar shingle factory from Dow.

Utilizing Existing Infrastructure

Infrastructure development can be expensive. The extension of new utility lines, paving of roads and increase in capacity can be an overwhelming cost that can either reduce opportunities for new development or thwart these opportunities altogether. If a community has infrastructure in place that can serve new

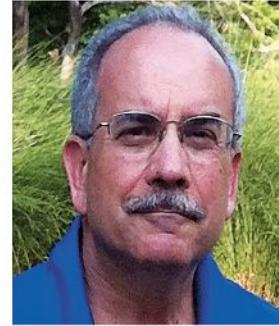
development, it is wise to repurpose this existing infrastructure in lieu of developing new. Zones of opportunity can allow for this kind of repurposing to be encouraged, incented and attractive to new users.

Consider the Keystone Opportunity Zones (KOZ) found in Pennsylvania. The first KOZs were established in 1999 and continue to be supported legislatively today. Created to reduce or eliminate

(Continued on page 148)

Dear Site Selection Readers:

In my twenty-eight years in the economic development business, the basics for success have pretty much remained the same today as they did in the 80's. Workforce, transportation, logistical concerns, cost of doing business and quality of life are as important today as ever. Whether it was helping Toyota with their decision to locate the Tundra Truck Plant in 1995, assisting GE with its plans to re-shore the hybrid hot-water heater in 2010 or the dozens of other successful attraction projects I have worked on, these concerns have been paramount to the final decision.



Ken Robinson, CEO, MAP

With businesses knowing the precise cost per mile of moving their raw material and finished products, location decisions weigh heavily on a company's overall bottom line. Muhlenberg County is Kentucky's ideal location in the US midsection and provides companies a competitive location with the ability to reach over 50% of the nation's population and manufacturers within 600 miles. In fact, Muhlenberg County is located 120 miles from the median center of US population.



Muhlenberg County KY's Central Location

In today's hyper-competitive, economically challenging environment, companies considering new locations have the luxury of being able to demand, and often receive, inducements that go directly to their bottom line. An ideal location acts as a prime incentive with the cost savings derived over time often surpassing the value of a time sensitive incentive package. Muhlenberg County is home to the area's premiere business park and is the ideal location for food processing, advanced manufacturing, call centers, warehousing and distribution. Space is currently available in the park up to 375 acres for your business. With direct access to the Western Kentucky Parkway at Exit 48, a site in the new 375-acre Paradise Regional Business Park makes perfect economic sense. Need a quick location? Other buildings and sites are also available in the county, and a "virtual building" designed for ease and speed of

construction can be toured online by scanning the QR code at the bottom of this page.

Abundant, affordable natural resources, excellent educational facilities, logistic advantages and work



ready labor force are just a few of the area's many advantages. Muhlenberg County is also a great place to live and grow a family. It is home to Budget Travel's 4th ranked "America's Coolest Small Town" for 2013. Birthplace of the Everly Brothers and thumbpicking, a unique style of guitar picking, the area has a rich musical heritage and hosts numerous music festivals yearly. Outdoor sports and activities abound and the people are friendly and welcoming.

Contact us today for specific information addressing your needs. We think it would be heavenly to welcome you to Paradise. We believe you'll be amazed at the quality of our workforce, strategic location, and our ability to bring your project in on time and under budget.

Ken Robinson,
CEO, MAP



Join us in Paradise - contact Ken Robinson today (270) 338-4102 • ken@maf.us • www.maf.us

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A few key reasons to consider Paradise Regional Business Park:



- 375 acres of flat buildable sites available in a new fully served industrial park with flexible site layouts.
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- Located in Muhlenberg County, Kentucky, within a half-day drive of major markets including Nashville, Memphis, Chicago, Louisville, St. Louis, Cincinnati, Indianapolis and Birmingham.
- Progressive business and family friendly community with a “Can Do” attitude and approach to life.
- Professional, responsive economic development director with 28+ years experience making Win-Win deals.



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(Continued from page 145)

the tax burden for property owners and businesses throughout Pennsylvania, the majority of designated sites are located in former industrial parks or near airports.

Pennsylvania experienced a significant amount of industrial growth during the 1970s and 1980s. However, as the economy shifted into the 1990s and into today, the state has been left with expanses of factories, mills, office buildings and abandoned infrastructure as well as a significant loss of taxable revenue and local jobs.

Beyond providing incentive support to locating or expanding businesses, KOZs allow a community to create new opportunities to repurpose existing infrastructure suited for primary users. Communities benefit through stabilization of tax base, increase in local jobs and capture of utility fees from new users.

Through the Keystone Opportunity Zones, Pennsylvania has been able to entice development within areas that allow for the repurposing of existing infrastructure, providing a significant cost savings to companies and communities alike.

Removing Political Barriers

Time to production is among the most important considerations in determining a new location for a business. Delays caused by lack of or inappropriate zoning, inability to receive required permits or a host of other related land development issues can lead to either company losses or a lost prospect to the community. Opportunity zones that specifically address the expedition of these critical decision factors are key to creating an environment that is pro-business.

California's Enterprise Zone (EZ) Program was created to stimulate business investments in areas that are economically disadvantaged and to spur job growth in areas of high unemployment. Beyond tax credits, the program offers job referral services, development permitting expedition and reduction on development permitting fees. Companies developing within a qualified California EZ are given special considerations on their financing arrangements. They receive priority for Industrial Development Bond applications, and lenders may deduct net interest income on loans to EZ businesses.

Creating an environment where prospective end-users can easily navigate development permitting and financing angles is incredibly attractive. Removing political barriers is an effective outcome of Enterprise Zones.

If a community has infrastructure in place that can serve new development, it is wise to repurpose this existing infrastructure in lieu of developing new.

Creating an environment where prospective end-users can easily navigate development permitting and financing angles is incredibly attractive.

Aligning Opportunities with Existing Work Force

Regardless of economic conditions, communities that can hone in on their existing assets and provide flexibility in their incentives offerings have found success.

Michigan is the leading auto-producing state in the U.S. However, changes to the economy over the past several decades have changed the siting patterns, investments, facilities needs and number of locations necessary to serve the auto industry. The result has left pockets of areas throughout the state in need of redevelopment.

Michigan is a leader in other capacities, as well. The state ranks in the top five in overall research and development (R&D) expenditures. Michigan is also strong in agricultural production, with more fruit harvested in the state than any other in the U.S.

Michigan recognized the need to attract jobs for their diverse, skilled work force and has developed options such as the Renaissance Zone program. With advantages to offer in multiple primary sectors, Michigan identified a need to develop special opportunity zones to accommodate the many different user types considering their state for location. Zones exist for agricultural and forest products processing, border crossing, renewable energy, tool and die and mega-projects. Through the offering of diverse zones, Michigan has allowed prospective end-users to select sites within targeted areas and receive significant tax advantages as a result.

Sustaining Quality of Life

Many U.S. communities have experienced a declining population and have sought innovative ways to attract development to their communities. The ability to create zones such as Tax Increment Financing (TIF) Areas has allowed effective partnering between companies and communities to enhance local quality of life.

The increased mechanization of agriculture has led to less agricultural production jobs, which left some Nebraska communities faced with finding innovative ways to maintain their communities and the sometimes over-built infrastructure to serve a declining population base.

Through TIF, multiple Nebraska communities were able to achieve the development of biofuel plants that provide considerable numbers of higher wage jobs and significant capital investment to rural areas in need of investment. TIF allowed the communities to, in a sense, partner with the developers of these plants to provide the necessary infrastructure and site improvements to ready parcels for development.

These plants have played a substantial role in stabilizing multiple Nebraska community economies.

Tax Increment Financing is designed to help finance development in either state- or locally-designated redevelopment areas, generally through the bonding of future tax revenues. The uses for TIF are typically restricted to those that are "public" in nature, including a variety of forms of infrastructure that serve the new development as well as the larger community.

TIF projects provide immediate benefit to local communities in the form of economic development, jobs, public infrastructure improvements, increased goods and services and potential sales tax revenue increases. The stabilization of property values and improvement of community infrastructure are important to sustain-

ing community quality of life.

Simply put, if structured properly, Zones of Opportunity provide more than simply an incentive package to companies and developers. The "give" and "get" are that they provide opportunities for communities to repurpose vital infrastructure and assets while sustaining quality of life through job creation. In the end, they prove to provide significant benefits to their costs, creating a net gain to the communities where they exist.

Courtney Dunbar is the Economic Development Leader for Olsson Associates in Omaha, Neb.



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West Coast Ports and Economic Development Zones

Long America's biggest trading partner, Asia has emerged as the world's biggest market, with China overtaking the US as the world's top trading nation in 2012. Combine that with the recently signed Free Trade Agreement with South Korea and the agreements currently being discussed with Trans-Pacific Partnership, and it's easy to see how US Pacific ports, enterprise zones and forward-thinking regions will reap the benefits of this new economic reality.

America's Pacific Ports are also moving aggressively in preparation for the completion of the Panama Canal expansion, which will see a dramatic increase in deep-water container ships previously unable to navigate the Canal. Once the Panama Canal expansion is complete the Canal will accommodate container vessels 160 percent larger than ships allowed through today, forever altering global trade routes. This larger generation of container ships and supertankers are known as "Post-Panamax." Currently only four US ports are capable of supporting post-Panamax ships, and all of them are on the West Coast (Los Angeles, Long Beach, Oakland and Seattle.)

A port is considered post-Panamax ready once it meets three key criteria:

- Channel depth of 50 feet with sufficient channel width and turning basin size
- Cranes capable of loading and unloading post-Panamax ships
- Docks engineered to handle the new bigger cranes.

by ADAM JONES-KELLEY
editor@siteselection.com

There are a myriad of first-class ports and free trade zones along America's Pacific coast. Two of these — the Port of Los Angeles and the Port of Long Beach — are the busiest ports in the US, and many more are undergoing substantial infrastructure improvements, positioning themselves for a new era in global trade.

Enterprise zones and foreign trade zones, with favorable tax incentives and continent-wide access through well-developed logistics infrastructure, continue to be a favorite destination for corporate investment.

On the following pages we highlight some of the ports, trade zones, economic development zones and regions primed to take full advantage of all the new potential investment.



Two Liebherr cranes do their heavy lifting at the Port of Vancouver in southwest Washington.

.....

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Port of Vancouver USA

CENTENNIAL INDUSTRIAL PARK: 108 ACRES READY FOR BUSINESS



TOP 5 REASONS TO DO BUSINESS AT THE PORT OF VANCOUVER USA

1. AVAILABLE LAND
2. LOW LEASE AND LAND PRICES
3. TRANSPORTATION ACCESS - RIVER, RAIL, ROAD AND AIR
4. SKILLED WORK FORCE
5. LOW TAXES AND COST OF LIVING



Starting Business in California

know what you're thinking — but believe it or not, doing business in California has incentives, you just have to find the right location in the San Bernardino Valley Enterprise Zone (SBVEZ), Southern California's transportation crossroads.

For more than 25 years, enterprise zones have been California's cost advantage to building and growing a footprint on the West Coast. The SBVEZ has become the location of choice for manufacturing, distribution and e-commerce businesses such as Amazon, Kohl's, Simpson Strong-Tie and Hewlett Packard.

Enterprise zones offer tax credits that lower operational costs long term, and add more return on investment for workforce and capital investments than any other economic development program available in the state.

Mitigating one of the high costs of doing business in California — taxation — enterprise zones help businesses reduce their annual state income tax with a portion of the hiring wages paid to local workers, the sales tax paid on equipment purchases, and accelerated depreciation on various business property — giving business owners long-term flexibility to

dedicate resources where they need it most.

Located 60 miles east of the ports of Long Beach and Los Angeles, the SBVEZ's centralized location and advanced supply chain allows businesses to move product by air, rail and truck to anywhere in the U.S. With its sophisticated rail network and intermodal container facility, an international airport, and direct access to six key distribution highways, the SBVEZ has the capacity to grow with business.

As an emerging business hub, the SBVEZ offers modern, more affordable commercial product than older populated markets in California. Currently, more than 1.7 million sq. ft. of commercial space is available, and another 1 million sq. ft. is under construction. This means lower rents, modern facilities and open parcels to expand business.

And if that wasn't enough, the SBVEZ also provides several energy, utility, workforce and business development programs to help companies further reduce costs.

Enterprise zones are the best strategy to starting a business in California. Nowhere else can businesses get the best of California at the most competitive cost.

SBVEZ
San Bernardino Valley Enterprise Zone

The SBVEZ is Your Opportunity Zone

The San Bernardino Valley Enterprise Zone is Southern California's transportation crossroads offering:

Location Opportunities:

- 60 miles east of the port of Los Angeles and Long Beach
- A sophisticated air, rail and truck goods-movement network

Real Estate Opportunities:

- Modern, affordable commercial stock
- Open parcels to grow
- Affordable executive and workforce housing

Additional Cost-Saving Opportunities:

- State tax incentives that reduce workforce and costs
- Energy and utility programs for additional cost savings
- Qualified workers, affordable wages and workforce incentive programs

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Companies Choose Kalama for Diverse Modes of Transportation: River, Rail, and Highway

Just 30 minutes north of Portland, Oregon, Kalama is one of the jewels of the Pacific Northwest with prime industrial land and state-of-the-art industrial buildings. A convenient location for companies searching for the perfect spot to grow, Port of Kalama is bordered by the deep draft Columbia River, mainline rail, and Interstate 5.

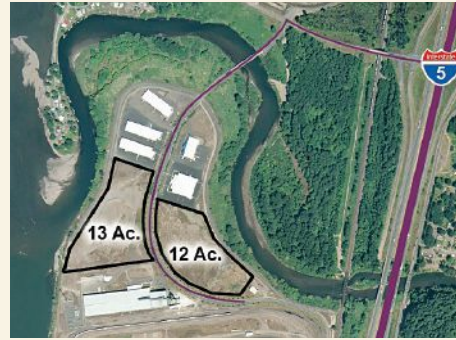
Kalama is attracting business attention for good reason. While its regional neighbors are challenged with a shortage of readily available industrial land, Kalama boasts 70 acres of prime industrial land and the new Kalama River Industrial Park. Kalama facilities offer numerous riverside assets and amenities ideal for manufacturing, technology, warehousing and many other uses.

Businesses of all kinds are lured by Kalama's treasures

Kalama is attracting new businesses to its amenity-rich industrial properties. Several advantages for businesses to grow in Kalama include:

- Location, Location, Location — on I-5 between Portland and Seattle
- Just 30 minutes from PDX International Airport
- Property — sites ready for quick development
- No state, personal or corporate income tax
- Collaborative, business-friendly environment
- Affordable/competitive utility rates
- State-of-the-art fiber optics
- Accessibility to all modes of transportation

"The Port of Kalama is in a great location," says Renee Ramey, marketing director of Steelscape, Inc. "For us it's the diversity of transportation. We work with raw materials and utilize shipping,



The Port of Kalama offers immediate access to Interstate 5 at exit 32.

I-5 and rail. Plus, Kalama's tax incentives have worked for us. And the work force there is a huge draw."

Gone fishing

One of the more pleasant surprises at the Port of Kalama is

the variety of recreational activities found in its expansive backyard. A 5-acre Marine Park stands out as a popular destination for both locals and tourists. Come enjoy the fishing, hiking, kayaking, skiing, hunting, or camping. And Mt. St. Helens makes an impressive backdrop as you work and play.

The Port's natural beauty has long been an attraction for tourists and day-trippers. Now businesses are being lured by its treasures.

Call Liz Newman for more information, 360-673-2325.

Port of Kalama

Port of Kalama -- a small town
with a big heart for business.

Kalama is one of the jewels of the Pacific Northwest with prime industrial land and state-of-the-art industrial buildings.

A convenient location for companies searching for the perfect spot to grow, Port of Kalama is bordered by the deep draft Columbia River, BNSF/UP mainline rail and Interstate 5.

Just 30 minutes from Portland.

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Our workforce is second to none. With some of the highest educated and skilled people in the U.S. several of our communities boast more PhD's and Engineers per capita than anywhere in the nation! Our K-12 STEM programs are infamous for our success in education as we focus on teaching the next generation of brilliant visionaries and entrepreneurs.

The Antelope Valley is "California's Renewable Energy Capital" and is the cradle for everything Wind, Solar and bio-fuel. Our Aerospace and Aviation community includes Mojave Air & Spaceport, Air Force

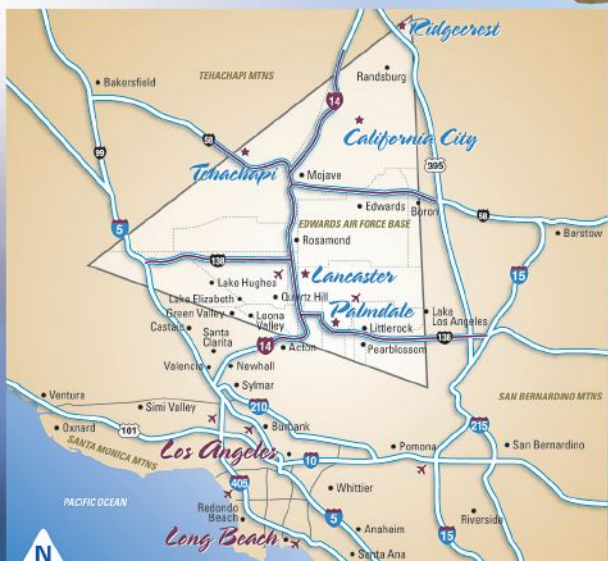
Base Plant 42, Edwards Air Force Base, China Lake Naval Weapons Base as well as five municipal airports. Companies like Boeing, Lockheed, Northrop, The Spaceship Company and Scaled Composites are proud to call us home. International eyes are on the A.V. as well with the recent announcement of China's first U.S. automotive manufacturing site for battery operated buses, and Japan's proposed site to manufacture metro purpose light-rail cars.

The Greater Antelope Valley, just one-hour north of Los Angeles – if you are seeking an address in Southern California to start, grow or expand your company. The Antelope Valley has room to grow, clean-air, affordability, a trained and educated workforce and wide-open spaces to live and play. Contact us today at the Greater Antelope Valley Economic Alliance and let us show you what the last, best place in Southern California can do for your business!

For more information call 800.888.7483.

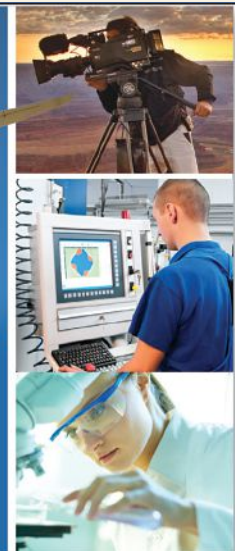


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- ▶ COST OF DOING BUSINESS**
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- ▶ COMMERCIAL SITES PRICED 50% LESS**
 than comparable Southern California locations
- ▶ HOUSING PRICED 30-50% LESS**
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Attributes of A Competitive Aerospace Site

by JASON S. DEAN
Managing Director, The Aerospace Alliance

Since its beginning in 2009, the Aerospace Alliance's mission has been to promote the aerospace, aviation, and commercial space manufacturing advantages in the southeastern United States. This not for profit trade association's members include the States of Alabama, Mississippi, Louisiana and Florida. When considering factors such as the total combined industry revenue and the aerospace and defense labor force, this region makes up the fourth largest manufacturing corridor in the world behind Washington, California, and Toulouse, France. Perhaps its greatest asset, though, is the ability to focus the political attention of four state capitals and scores of congressional members on an issue when it really counts. It is for these reasons and others that this region of the United States has found recent success in major aerospace related announcements. Projects such as the Airbus A320 final assembly plant in Mobile have revealed competitive attributes that multi-national aerospace companies are looking for in their site selection strategies. And, when you add other parts of the southeastern U.S. like South Carolina with its major Boeing assembly presence, the impact becomes even greater.

The April 2013 Airbus groundbreaking ceremony in Mobile signaled the start of a new era in aviation manufacturing in this country. It is reminiscent of the automotive sector 30 years ago when Honda and Toyota first established plants here. In those cases, these international companies were able to leverage the supply chain of the Big Three auto makers

The GE_{nx} engine is supported by GE Aviation supply chain investments in locations such as Batesville, Miss.



Photo by T. Denson courtesy of Airbus S.A.S.

The importance of Airbus' U.S. A320 Family final assembly line was underscored by EADS CEO Tom Enders at the new facility's high-profile groundbreaking ceremony held in April in Mobile, Ala.

while creating thousands of new American jobs. For Airbus, opportunities abound in working with those aerospace suppliers that have provided a long history of support to Boeing, Lockheed Martin, Raytheon, Northrop Grumman and other companies. The hope is that just as other international auto manufacturers followed those first efforts, Airbus is a harbinger of what promises to be a steady line of aerospace industry related opportunities.

Unlike 30 years ago, the effects of globalization have taken large scale manufacturing from a vertically integrated production model to one that is increasingly horizontally integrated and specialized. For communities looking to be a part of this conversation, this means that as other international OEMs follow Airbus's lead, economic development prospects beyond just a final assembly plant will develop. What these companies are seeking is more than just a green field site or access to an airstrip. The flattening effect of globalization is gradually pushing global corporations

to reach out across political borders and across formerly insular industry support systems. As communities position

themselves today for these future prospects, they should consider understanding the impact of horizontal specialization.

Some examples include joint venture opportunities among American and international suppliers, building an intellectual capital presence through engineer-

(Continued on page 158)

Aerospace Companies Are Taking Flight in Mississippi

Mississippi is not just poised to be a leader in the aerospace industry — it already is. With a rich aerospace history dating back to the 1930s when Pioneer Aerospace located in Columbia, leaders in the aerospace industry have long realized that Mississippi is a tremendous place to locate their operations.

Mississippi's central location and well-integrated transportation network of airports, interstate highways, railroads and ports provide easy access to major U.S. markets. The state offers the Aerospace Incentives Program, which provides tax incentives for aerospace-related businesses that locate or expand in the state and customizes incentives to meet each company's needs.

GE Aviation has taken full advantage of Mississippi's aerospace advantages by opening two composite components production facilities in the state. American Eurocopter, a division of EADS North America, produces the Lakota helicopter for the U.S. military, as well as other models, in Columbus. And Mississippi's close proximity to the new Mobile, Ala., Airbus manufacturing facility and the state's highly-skilled and motivated workforce mean Mississippi is a prime location for aerospace suppliers.



American Eurocopter's UH-72A Lakota Light Utility helicopter produced in Columbus, Mississippi.

Mississippi is looking to future aerospace technology frontiers, particularly in unmanned systems. The state is already home to industry leaders Aurora Flight Sciences, Northrup Grumman and Stark Aerospace and is competing for one of the coveted UAS test site locations that will be designated by the FAA. The state's research leadership, restricted use airspace over Southern Mississippi and the Gulf of Mexico and a ten year track record of UAS flight integration make Mississippi an ideal location for a UAS Test Site.

Mississippi is also focused on fostering new research and development initiatives through our colleges and universities, like the Raspet Flight Research Laboratory at Mississippi State University and the Mississippi Polymer Institute at the University of Southern Mississippi.

The aerospace industry is not only thriving in Mississippi, it is primed and ready for growth.

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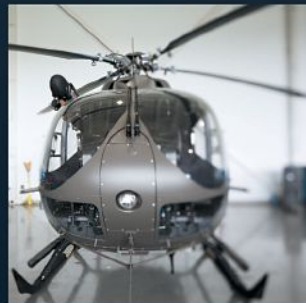
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(Continued from page 155)

ing centers and connecting into the local postsecondary education system, and getting the right workforce training and labor recruitment policy into position.

International supplier joint venture opportunities show a promising future. State and local developers can begin to take advantage of this movement today by surveying the existing supply chain in the United States and those international suppliers signaling an interest in a joint venture. A realistic understanding of the current and projected supply chain opportunities will enable communities to strategically begin the recruitment of interested U.S. based companies. If suppliers are already established in an area, developers should ensure that they are aware of these potential JV prospects by inviting them to regionalized site visits.

A second project communities can embark on today to recruit future aerospace prospects is to begin building the presence of aerospace related intellectual capital. The Airbus Mobile Engineering Center, which employs 220 engineers, was an important, tangible commitment by both the state and the company to help sustain the transition from a discussion about a defense contract to the establishment of a viable commercial aviation manufacturing center. This facility was already in place when it really mattered. Strategic relationships with community colleges and universities with aerospace engineering credibility can be developed to ensure an effort is underway to build the type of reputation and the critical mass that will help recruit future prospects. If it doesn't exist, now is the time to focus training dollars and curriculum development on this future economic driver. An added benefit to being intentional in nurturing these types of public-private sector connections is that by doing so, the foundation will be in place for larger research and development opportunities when a project is announced in the area.



American Eurocopter, a division of EADS North America, produces multiple models in Columbus, Miss.



A final factor that communities may wish to consider in positioning for a competitive future is working through state leadership to ensure the right workforce and labor policies are in place. The federal government allows a great deal of discretion in the use of

Department of Labor training dollars such as those found in the Workforce Investment Act. Local and regional leadership can begin now to approach state decision makers and request that those discretionary dollars be directed towards portable skills training that would be useful at an assembly plant or a large scale supplier. Another competitive edge would be to conduct a workforce



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The renderings contained herein are not necessarily to scale nor final; intended only to illustrate conceptual designs.

City of SeaTac: An Ideal Landing Space

comparative analysis of how local and state employment tax incentives compare regionally. The results of this could provide a useful point of reference for recruitment or to position for changes that would make an area more competitive.

While these are practical and productive efforts that will pay off for communities, it should be mentioned that there are other less quantifiable strategies to consider. Building relationships cannot be underestimated. The Airbus announcement in Mobile last July was a culmination of years of effort and tens of thousands of travel miles. Bringing local developers to international air shows and vendor conferences requires an upfront investment but will pay dividends over time. A multi-state regional approach such as that used by the Aerospace Alliance would also be a strong addition to a developer's toolkit. Partnering in this manner will provide more political will power and more resources for a large project.

The aerospace industry has experienced a paradigm shift and those communities who position themselves today will be the beneficiaries of this tomorrow. Like the automotive industry three decades ago, international corporations have established themselves here leading to thousands of American jobs and billions in economic development for the country. The automotive shift didn't stop with Honda and Toyota. And just as Nissan and Kia followed, so will other aerospace OEMs follow Airbus. Those communities who are able to meet the demand for horizontal specialization will be ready. The thinking has to go beyond acres and a tarmac. A holistic approach that includes creative partnerships, building intellectual capital, and developing effective public policy will provide the key attributes to ensure regions will be successful in competing for these future aerospace prospects.

Jason S. Dean is the Managing Director of The Aerospace Alliance.



With its close proximity to Seattle-Tacoma International Airport and the seaports of Seattle and Tacoma, the City of SeaTac provides an ideal landing place for aerospace industries.

The airport is located within the city limits with three runways that operate curfew-free to ensure no delays. In 2012, the airport served more than 33.2 million passengers, making it the 16th-busiest airport in the United States. Additionally, total air cargo of 283,500 metric tons passed through the airport.

The region is also home to Boeing, which employs more than 85,000 individuals in Washington. The aerospace giant opened its SeaTac Spares Distribution Center in 1993. With more than 700,000 square feet of space, the center is the largest facility of its kind. Under the center's

15-acre roof, a two-mile long conveyor system carries millions of spare parts used to support and service the 13,000 Boeing commercial jetliners in service today. The facility utilizes the convenient location to ensure a smooth and timely delivery process.

In addition to serving current aerospace manufacturing companies, the area is also investing in its future — with the Aviation High School. As part of the Highline School District, the aviation and aerospace-themed school serves about 400 students in grades 9-12, and focuses on preparing students for college, and aerospace careers.

The City of SeaTac embraces its role as a transportation hub for Boeing and many logistics companies that rely on a variety of airport, seaport and highway systems to efficiently conduct their business.

The City of SeaTac embraces its role as a transportation hub for Boeing and many logistics companies that rely on a variety of airport, seaport and highway systems to efficiently conduct their business.



Credit: Port of Seattle



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To find out about all the possibilities the City of SeaTac has to offer, visit: CityofSeaTac.com/Everywherespossible.

Why is New Hampshire's aerospace industry soaring?

Karen Pollard



City of
Rochester

New Hampshire has been ranked as the Most Livable State each year since 2005 by CQ Press, and is known for low taxes and the motto "Live Free or Die". Driving through the small cities and towns on roads that twist across the state, it's easy to see why tourism is a major industry and "foliage" is a designated season. How, then, did a suburban city in a small state without a war chest of incentives compete for and win the location search for a \$100 million aerospace facility? The key was a customized response that was as nimble and complex as today's global business environment, and a comprehensive team of partners. The local economic development office for Rochester, N.H. led the recruitment team for the project, and persevered during a two year selection and negotiation process, managing a complex package of deliverables. The ultimate key to success was the team being small, talented and committed, and support from the State Department of Resources and Economic Development, the N.H. Business Finance Authority and Governor John Lynch.

Today in Rochester is construction of a state-of-the-art aerospace composites facility more than 8 acres in size and not just utilizing technology, but creating new technology for the composite engine components in the LEAP Engine, a disruptive next-generation product. The engine components as well as this 343,000 s/f facility are the result of a unique partnership between Albany Engineered Composites, a divi-

sion of U.S. Albany International Corp., and Safran Engineered Composites, a division of the French firm Safran, global leader in jet engines and aerospace components. The new facility will employ at minimum 400 skilled and semi-skilled employees by Albany and Safran USA with a payroll of more than \$40 million annually. In anticipation of the shared facility, Albany International Corp. announced the relocation of their corporate headquarters from Albany, N.Y. to Rochester, N.H. in 2010, and acquired a second building in the Granite State Business Park reaching 250 employees and 325,000 s/f. Indirect employment includes 1,349 new jobs across the state from the many suppliers and vendors working with Albany and Safran, and from the economic impact of the salaries and purchasing of these companies and their employees.

One of the greatest challenges to be addressed during the selection process was the demand for 400 skilled and semi-skilled employees to be trained. The team worked with Great Bay Community College, the University of New Hampshire and others to work to meet this requirement. The plan called for a 17,000 s/f Advanced Technology and Academic Center in Rochester with a composites lab and classroom space to train the skills needed. During the most difficult state budget during the Recession the N.H. Legislature funded a \$4 million investment in an effort many thought was impossible. The Community College System also successfully applied for a U.S. Department of Labor Grant for \$19.9 million. Today the Rochester Advanced Technology and Academic Center is under construction and set to open January 2013, creating another 30 support positions.

Albany International has 322,952 s/f and owns 56.06 acres in Rochester, with expansion area for an additional 100,000 s/f. They have 323 employees with an annual payroll of \$16,980,000, and 62 LEAP related employees for an additional



Albany and Safran LEAP Engine Composites Facility - Rochester, NH

\$3,720,000. They will invest \$24 million in equipment over the next two years. Safran USA occupies a 50 acre parcel for the new 343,000 s/f facility for co-located manufacturing with Albany, employing at least 200 Safran and 200 Albany employees in that plant. The payroll has been estimated at \$20 million annually with possibility of major expansion before 2020. Facility construction is \$38 million and \$50 million for equipment and installation over a three year period.

"Larger states can offer financial incentives that vastly overwhelm what the Granite State can offer, but New Hampshire's smallness was its strength", said Joseph Morone, Albany International President and CEO in an interview in February 2011. "In Albany International's case, personally committed leaders, an innovative and willing educational system, and a unique quality of life outweighed enormous tax breaks."

This project represents a "new normal" in economic development, where a sophisticated team strategy delivers on current and future business demands. Workforce with relevant skills is the critical component for site selection and long-term location success, and can be delivered by non-traditional locations with powerful partnerships – even Rochester, N.H.

Karen Pollard, CEcD, EDP is the deputy city manager/director of community development for the City of Rochester, N.H. and leads their business attraction strategy. www.ThinkRochester.biz

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Ports on Water, Ports on Land

Logistics site selection trends are based on the dynamic of increasing global trade as countries both compete and collaborate to address the demand for goods and services.

Companies continue to strive to connect the sourcing/production and the distribution sides of the supply chain by balancing factors such as labor, transportation and production costs as well as distance and transit time to consumers. Every mile and every minute reduces a company's bottom line.

Major infrastructure improvements are planned or under way worldwide in response to current and projected expansion of global trade, which is tied to population growth and emerging markets.

In China, for example, the recent expansion of inland intermodal rail systems and capacity connects 18 inland ports to intermodal rail, moving loaded double-stack containers from inland manufacturing and distribution facilities to consumers throughout China and the world.

China's policy is to continue to push manufacturing to the rural north sections of the country, thereby reducing pressure on the major cities. As a result, there will be an increase in cargo traffic through the northern ports and rail lines.

In North America, infrastructure projects include inland ports and logistics centers, and major rail carriers are adding and expanding intermodal terminals. These include CSX terminals in Northwest Ohio and Winter Haven, Fla., as well as Rosenberg, Texas (KCS), Memphis (BNSF), Birmingham (NS), and in Kansas City (KCS and BNSF).

The Panama Canal expansion has the potential to shift trade patterns. Completion of the widening of the Panama Canal, scheduled for 2015, will provide for all-water trade routes between Asia and U.S. East Coast ports, which will also see an increase in transits via the Suez Canal.

by **CHRISTIE ALEXANDER,
GEORGE LIVINGSTON,
& DREW SAPHOS**
NAI Realvest

This shift in trade routes further establishes the Canada/U.S./Mexico North America trading block, which enjoys supply chain alliances providing service to Northern U.S. and Midwest regions via Canadian ports, while ports in Mexico serve Southern and Midwest states.

U.S. East Coast ports with sufficient channel depth (50 ft.) will benefit the most from increased traffic via the Panama Canal, as will ports near major population bases. The upgraded ports will accommodate post-Panamax ships, which have carrying capacity of up to 12,500 TEUs, compared with current Panamax ships with 4,500 TEUs. According to the U.S. Army Corp of Engineers, post-Panamax vessels will constitute 62 percent of total container ship capacity by the year 2030.

With the expansion of the Panama Canal, East Coast ports are positioned to challenge the dominance of West Coast ports, the location of the majority of current U.S. container trade (through

the ports of Los Angeles, Long Beach, and Oakland). The bicoastal competition issues include ongoing traffic congestion and labor problems plaguing West Coast ports. U.S. supply chain systems stand to gain overall, as West Coast ports invest in improved rail systems.

Multiple East Coast port dredging projects are planned or under way to join Norfolk and Baltimore in accepting container shipments from Asia. Projects include dredging at Miami and raising the Bayonne Bridge by the Port Authority of New York

and New Jersey. Charleston has also secured funding to complete post-Panamax dredging upgrades.

PortMiami, the port closest to the Panama Canal, has invested over \$2 billion in post-Panamax-accommodating infrastructure improvements, the most significant of which are the Deep Dredge (a project lowering harbor depth to the required 50 ft.), and the restoration of on-dock intermodal rail service. Related infrastructure investments include acquisition of post-Panamax cranes and direct highway access via tunnel.



Intermodal growth is central to the business plans of many railroads, including Kansas City Southern, which operates terminals in Mexico and the United States.

Photo courtesy of Kansas City Southern

The Shift to Rail

Rail carriers are joining ports with major transportation infrastructure investments, as the supply chain increasingly moves toward trains. Rail is progressively competitive with trucks, and will be even more so as liquefied natural gas is adopted for trains. The shift to rail from long haul trucking is based on fuel cost concerns, road traffic congestion, and driver hours regulations impacting productivity and costs. Chicago-based NAI Hiffman cites the advantage to rail of changing fundamentals of what has historically been the basis for most supply chains, specifically cheaper oil and more traditional access to trucking capacity. "The migration to rail is absolute as it is the only viable alternative to long haul trucking. In addition, intermodal is becoming more competitive in short distances, absorbing more of the projected growth in freight."

The rail industry's investment in infrastructure improvements includes enhanced multimodal rail sites and integrated logistics centers, in effect inland ports.

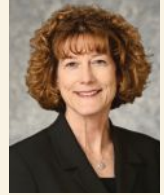
These proposed inland ports are

strategically located to provide superior access, available labor, and lower project costs than their seaport counterparts. Inland port and integrated logistics center developers are also consolidating the logistics process by incorporating distribution and warehousing elements into adjacent facilities. CSX, for example, has broken ground on the 318-acre terminal of their ILC in Winter Haven, Florida with plans to co-develop an adjoining 930 acre business park to provide synergy to rail-oriented companies. The Winter Haven ILC and business park, which will focus on distribution and light manufacturing, is located in the geographic center of the state, approximately 50 miles from the Port of Tampa and 60 miles from Port Manatee in Bradenton.

Transportation infrastructure is a critical factor impacting location decisions for manufacturing facilities. Despite relatively high labor costs, U.S. manufacturing locations may still be valid selections based on comparative advantages including established supply chain reliability, economic stability, beneficial trade agreements and

security considerations.

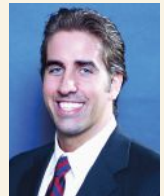
"Employment stabilization across the manufacturing sector bodes well for the overall economy and creates opportunity for real estate," said Thomas J. Bisacchino, NAIOP president and CEO. "Rising wages in countries like China, increasing global transportation costs and political instability abroad are all factors affecting the decision to remain or return to the United States."



C. Alexander



G. Livingston



D. Saphos

George Livingston, CIPS is founder and chairman of NAI Realvest and chairman and CEO of Realvest Development and CommerCenter. Christie Alexander is a principal at NAI Realvest, where Drew Saphos, CCIM, is an associate and consultant.

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Location, Logistics and Transportation:

- Northwest Tennessee is near the geographic center of the U.S. population.
- Dyersburg/Dyer County is well connected via Interstate highways 55 and 69, US 412 and US 51, with the only highway bridge across the Mississippi River between Memphis TN and Cairo IL.
- The main line of the Canadian National Railroad runs from Chicago to New Orleans right through Dyersburg/Dyer County's three industrial parks.
- The Port of Cates Landing intermodal barge terminal on the Mississippi River is located only 25 miles from Dyersburg.
- Dyersburg is less than 90 minutes from Memphis International Airport and the Superhub of FedEx.

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- Tennessee is a right to work state; Dyer County has NO manufacturing unions.
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Measuring Progress

You can't train someone until you accurately measure the skills they have relative to the skills they need for success in a given career.

Today's manufacturing jobs require higher skill levels than ever, but our nation is facing a growing "middle-skills" gap. We're producing a surplus of workers with low skills suitable for low-skilled, low-wage jobs. And our higher education system is able to supply the highest skilled workers for very high-skilled, high-wage jobs. But we face a growing shortage of qualified workers for crucial middle-skilled occupations across a vast swath of our economy.

My organization, ACT, is the nonprofit public trust best known for the ACT college readiness assessment. But we also offer a suite of applied workplace assessments known as ACT WorkKeys® that measure an individual's foundational workplace skills. The ACT WorkKeys assessments in Applied Math, Reading for Information, and Locating Information — skills our research indicates are required for the vast majority of jobs — form the basis of the ACT National Career Readiness Certificate™ (NCRC), a portable, industry-recognized credential that certifies essential workplace skills. More than two million people have earned an NCRC to date.

WorkKeys and the NCRC provide a common language to individuals, employers, and educators for that vital conversation about foundational workplace skill requirements. Two decades of ACT job analysis research helps employers understand which skills — and at which level — are required for the jobs they offer. Individuals learn where they stack up by taking WorkKeys assessments and earning an NCRC. And educators, economic developers and community leaders use the results to identify skills gaps and build career pathways. We must encourage more young people to reach higher foundational skill levels so we have more qualified workers in the pipeline for middle- and high-skilled jobs. ACT has just released a groundbreaking report on work readiness benchmarks and standards, allowing individuals, employers, and communities to help build that bridge.

by **DEBRA LYONS**
Vice President, ACT

Part of building that bridge involves foundational skill training and career pathway support provided by ACT via KeyTrain® and Career Ready 101™.

KeyTrain offers individualized learning modules in Applied Math, Reading for Information, and Locating Information — the same foundational workplace skills measured by the NCRC. Nationally, our workplace training culture is highly focused on career-specific occupational training (consider the specialized skills needed for an electrician or a nuclear technician). But to be ready for those types of training opportunities, an individual must have a sophisticated foundational skill level. We need to increase the baseline skill level of the emerging work force, in particular, to close the foundational skills gap for middle-skilled jobs.

Indeed, ACT assessments, credentials, curricula, and community-based programs are leading to more specialized training opportunities. The foundational KeyTrain curriculum helps individuals improve their baseline skills, while Career Ready 101 steers them toward career pathways and opportunities for additional training aligned with a specific industry. An NCRC earned at the Gold level comes with a recommendation from the American Council on Education for three hours of college credit. Many vocational

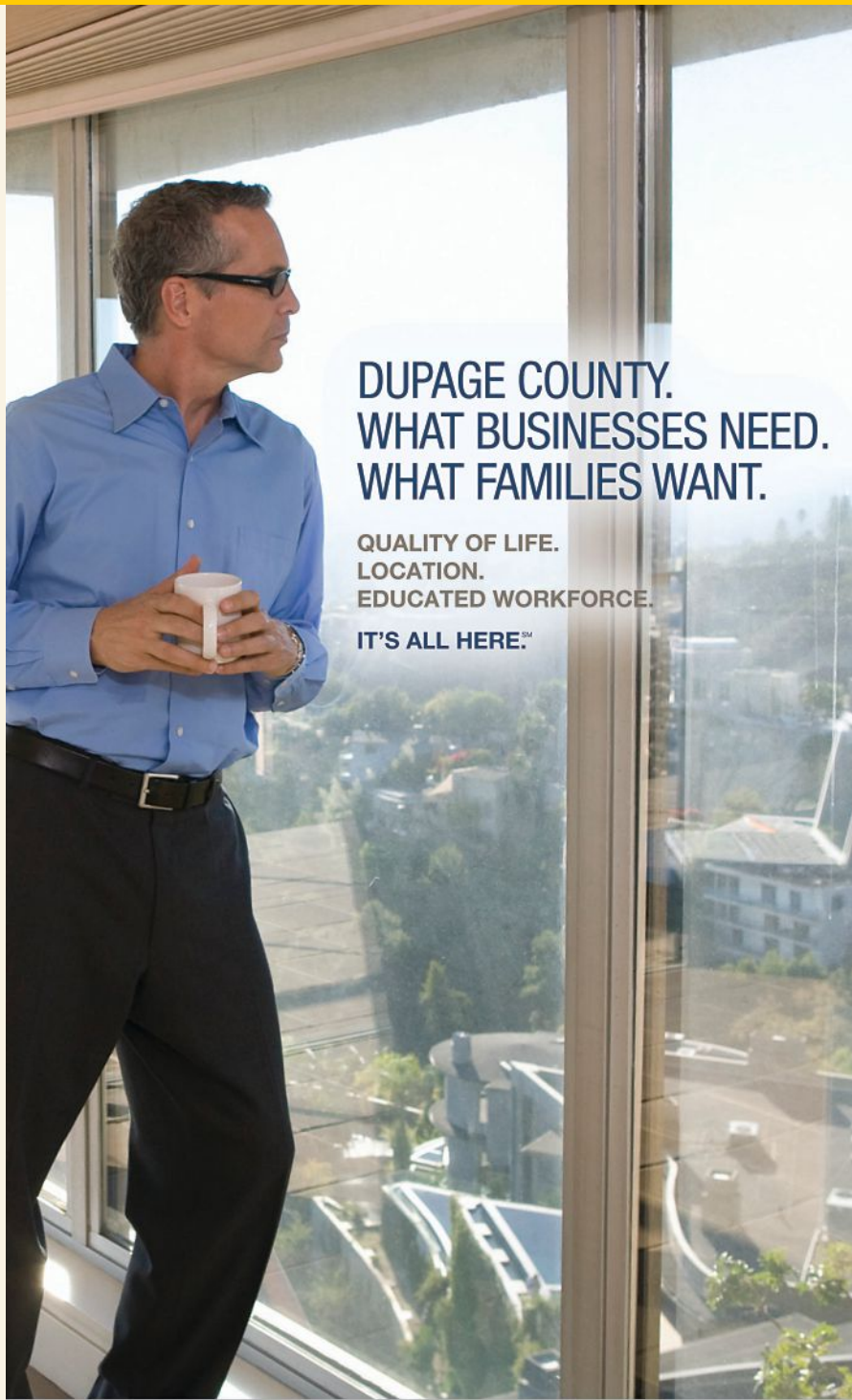
programs award credit for an NCRC earned at the Silver level. This sets up a natural progression to additional training or education once someone earns an NCRC at any level.

How do individuals, employers, educators and economic developers tap into these resources?

Many counties, states, and regions have joined the ACT Certified Work Ready Communities (CWRC) initiative, which integrates the entire ACT work readiness system of assessments, credentials, research, and curricula into a holistic, community-based work-force development ecosystem. Through CWRC, we are creating opportunities for communities to know the quality of their work force. This helps community leaders measure and close skills gaps while also providing irrefutable proof that their work force meets the demands of business and industry.

We publish real-time work force skill data every month in the

We must encourage more young people to reach higher foundational skill levels so we have more qualified workers in the pipeline for middle- and high-skilled jobs.



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form of NCRCs earned by county, by work-force status, and by certificate level for every county in the United States. And we track progress toward certification goals for counties actively participating in the CWRC effort. NCRCs are awarded at the Bronze, Silver, Gold, or Platinum level, with higher levels indicating higher skills. Many times, a certificate holder at the Bronze level will undergo training, retake the assessments and then earn a new NCRC at a higher level. And yes, the real-time nature of our reporting system enables us to report only the highest level of the certificate earned — providing communities who are aggressive in closing the skills gap with a real-time solution to tell that story. We also report the number of improved certificates earned each month by county.

In addition to helping educators and employers better understand where to focus their training resources, this system empowers communities to enact long-term strategic work-force plans and redefine their work-force stories. Once a community is certified as a Work Ready Community, they have the opportunity to maintain that certification, showing the world they have an active, aggressive work-force development program in place that is producing talent aligned with the needs of business and industry.

Eight states are now formally engaged in the ACT CWRC initiative, and two additional states have active CWRC programs of their own that predated the ACT effort. We recently launched a pilot program to allow counties in nonparticipating states to engage directly with ACT. Closing the skills gap isn't going to happen overnight. But these assessment, certification and training programs driven by local community teams are the grassroots solution to a national problem.

Debra Lyons is vice president for community and economic development for ACT, where she leads the Certified Work Ready Communities initiative. More information, including county-by-county NCRC skill data, is available online at www.workreadycommunities.org.



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