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VOLUME 64, NUMBER 2

THE MAGAZINE OF
CORPORATE REAL ESTATE STRATEGY
AND ECONOMIC DEVELOPMENT

March 2019

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Cover design by Richard Nenoff

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CORRECTIONS & CLARIFICATIONS:

Several errors found in the "State of the States" report in Site Selection's January issue have been corrected and uploaded to our complete Digital Edition as well as to each state's individual data page online. Mercatus Center's state fiscal condition rankings, part of the "Rankings That Matter" section, were originally

printed wrong for the states in alphabetical order beginning with Florida, due to a spreadsheet transposition error. The original Nebraska data page did not include the correct name of Nebraska Department of Economic Development Director David Rippe, and included incorrect data in the accompanying project chart. Finally, the "Rankings That Matter" indicator for ACT National Career Readiness Certificates (NCRCs) was according to growth rates of NCRCs, not totals.

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On Country Mice And City Mice



Yes, we could be called a tad repetitive, if you're a reader of Site Selection for more than a couple of years, particularly of the March issue. But both Nebraska Governor Pete Ricketts and Texas Governor Greg Abbott are no less deserving of their respective Governor's Cups for economic development success in 2018 than they were the last few times they won. This is the Nebraska chief executive's third consecutive win and his state's fourth; Gov. Abbott adds a fifth consecutive Cup to his state's collection that now boasts seven.

You may experience some déjà vu, too, when you get to our coverage of Top Micropolitans and find that Findlay, Ohio tops the list — again. My point is to congratulate the winning governors and mayors of all the states and metros appearing on the rankings in this issue. If they're on those lists, for however many years has been the case, then whatever they're doing in economic development is working rather well.

No, it's not a coincidence that several other governors are featured in this issue — five in addition to Governors Abbott and Ricketts. Why stop at two? Three are new to their offices — Brian Kemp of Georgia, Michelle Lujan Grisham of New Mexico and J.B. Pritzker of Illinois. Larry Hogan has been governor of Maryland since 2015, and John Carney has led Delaware since 2017. We talked to all five for this issue. We were as interested in getting to know the new ones as we hope you are, especially if you currently have operations in those states, or if you one day might. Any one of them might one day be featured in these pages as having won a Governor's Cup for total or per capita projects. You read about them here first.

Rural economic development was a common topic in my discussions with Governors Abbott, Ricketts and Kemp, a topic each is focused on acutely. All three understand that there are key resources to be cultivated well outside the major urban areas in their states. These include emerging technologies in their agriculture industries, for example, that will one day make farming even more productive and their states more prosperous. All three have plenty of interstate miles on which to test autonomous vehicles for their logistics industries as that technology matures. Other examples abound.

Think of Micropolitans — the successful small cities in rural counties throughout the U.S. that attract capital investment — as laboratories, locations where ideas and technologies can be developed, tested and commercialized away from the spotlights and the HQ2 competitions. As Gov. Abbott notes in the cover story, the small projects are just as important to the small communities as the big ones are to the big cities. It's time for Small Town America to get some attention, and some new and existing governors will see to it.

Till next time,

Mark Arend, Editor in Chief



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We've Worked Hard to Stack the Deck

Remember the elevator speech principle? You know, a short capsule on what you do, or why you want a job, or why a relationship is important to you.

There are many applications. Here's my e-speech for why you should attend the Santa Barbara Forum.

First, IAMC's Professional Forums are in my experience the best events for meeting corporate real estate peers, catching up with service providers, making new friends, seeing old friends, and sharing work experience. The quality of the professional networking is as good as you can get. And this is what I look forward to at the Santa Barbara Forum.

Each one is different. And that coming up this spring promises unique learning experiences related to corporate real estate, general business and leadership (see IAMC's website for details). I'll highlight a few.

The Santa Barbara Forum will offer 15 CRE-focused professional development workshops, of which six are exclusively for Corporate Active members and nine are open to all attendees. Of the former, the Research Roundtable will feature a presentation on how new technologies, in particular artificial intelligence, could affect the brokerage industry and how CRE departments engage services in the marketplace. The Business Impact Interest Group session will feature a presentation on the IBM Tririga CRE and FM system. Both sessions will provide plenty of small-group discussion time.

The nine open-attendance CRE program topics include incentives packages, facility management, build-to-suit, lease flexibility, phase-1 Environmental Site Assessments, the permitting process and more.

On Sunday morning, IAMC's two

leadership offerings will be Dr. Relly Nadler on teamwork and Karen Hurt on building a personal brand.

This Forum's featured presenters could set the benchmark against which future programs are measured. Journalist and business icon Steve Forbes will give the Monday morning keynote address. After lunch, Greg O'Brien, JLL's CEO of the Americas, will give his vision for where the commercial real estate industry is headed and how it will change. IAMC regular Peter Zeihan will present Tuesday

morning a session entitled "America on the Edge." The Wednesday closing session will feature retired U.S. Astronaut Dr. Garrett Reisman.

The icing on the Forum cake for me is often the networking events. Santa Barbara is full-blooded California and a unique American city. Sunday evening you can look forward to the Welcome Reception and Dinner at the highly regarded Santa Barbara Zoo. And the popular Santa Barbara Maritime Museum will serve as the harbor-edge venue for the Tuesday evening reception.

We've worked hard to stack the deck in favor of you deciding to attend this Forum. Consider the offerings: a rich array of CRE professional development programs, leadership training for professionals, keynote by a national business celebrity, high-touch networking in cool venues, and the city itself with its Mediterranean climate and laid-back life style. What else can we do?

Please register if you have not already done so, and spread the word to your colleagues whom you would like to see attend.

Best regards,
Charles Waltz
Chair, IAMC Board of Directors



Charles Waltz



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The Taxman Cometh — And What to Do About It

by John Salustri

Here is a shocker for you: Tax assessments can be wrong. And when they are, it falls to the tax and/or real estate people in your organization to be aware and, one can hope, correct the error.

Notice, we said “hope.” The path to appeals is strewn with a lot of questions that, frankly, can go unanswered in the crush of daily business.

“Commercial real estate departments have so much going on that they may or may not be able to act strategically when it comes to appealing an assessment,” says Aaron M. Smith, CMI, senior manager, Property Tax, at Walmart Inc. in Bentonville, Arkansas.

Not surprisingly, the total Walmart portfolio is huge, consisting of both its massive retail and distribution footprints — mostly owner-occupied.

Even if the real estate group is fully staffed, the strategic focus also has to be there. “A lot of people who receive a property tax bill might not be happy with it,” says Smith, “but typically it’s too late then to do anything about it.” Chalk one up to the cost of doing business.

Knowledge Is Power

First and foremost, know what you are talking about. “Look at several years of valuations and capital expenditures,” recommends Samantha Turner, senior real estate manager for the Weyerhaeuser Company in Seattle. Turner oversees a U.S. portfolio of 17 distribution sites with roughly 100,000 sq. ft. of warehouse on 15 acres per asset. That is in addition to some 37 paper mills. The distribution centers are both owned and leased.

“Are you seeing any trends?” she asks. “Have your sites had any material upgrades that the assessors would react to? If you submitted a permit to do a half-million-dollar roof repair, the assessor will know about that through the county records. You don’t want to make that call to the assessor without knowing what has happened at your locations.”

Smith agrees: “You need a plan. You need to learn the assessment system, and what the market

data and research is saying about your property, such examples as market rental rates and sales of comparable properties.” When you arm yourself with that breadth and depth of information, “You’re creating for yourself the opportunity to foresee changes in your tax bill and rates. You can determine if you are indeed over-assessed, and if so, you can take steps to filing the appeal.”

Timing plays a critical role in that plan. “Some states do assessments in arrears, which means you would be paying in 2018 based on the assessment in 2017,” adds Turner. “That’s helpful because it allows you to track market trends and forewarn your business units of upcoming escalations. No one will change capital decisions based on taxes,

but it does provide the business units the opportunity to budget accordingly.”

You have noticed by now that the plan Turner and Smith are advocating for is pretty labor-intensive, especially, as we indicated above, for departments light on staff. “We aren’t well-staffed in the

real estate department,” says Robert F. Hull, vice president of Cost and Asset Management for SRS Distribution Inc. in McKinney, Texas. “So, with the Tax Department, we use third-party vendors to help us monitor the situation and to help us try to appeal tax reviews.” Despite the short staff, “It’s something we try to pay attention to.” That is, in addition to managing some 250 leased distribution sites in the U.S.

“Don’t be afraid to find help,” Smith urges. “If there’s a lack of in-house resources, there are property tax professionals who can help. But if you bring in outside help, continue to be involved. They’re working with you, and the more you understand, the more you can help your consultant and the better you can work with your assessor.”

“Have a good and ongoing dialogue with your tax vendor,” Turner agrees. “They’ll help you see the things that are going on that might have a material impact to your budgeting. You may not win everything you would like in an appeal, but if you get a small reduction, or at least if you’ve pushed back on the assessor, those are always

“You don’t want to make that call to the assessor without knowing what has happened at your locations.”

— Samantha Turner, Weyerhaeuser

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Friend or Foe?

Now, a word in favor of tax assessors. They are, after all, people too, and maybe — just maybe — that dire image they’ve earned over the years might be overstated. Executives we talked with brought up the subject of turning the assessor into an ally.

First, assessors might also be — excuse the phrasing — overtaxed. “They’re given a monumental task to value every single parcel in their jurisdiction, usually every single year,” says Smith. “Typically, they use a mass appraisal system, and they can get it right, but a lot of properties can be over-assessed or incorrectly assessed.”

“We’re very motivated to manage assessment, while the landlord might not be as much.”

— Robert F. Hull, *SRS Distribution Inc.*

Smith advocates rallying all forces to your cause. “We like to generate relationships all across the country, and we work with the assessors,” says Smith. “Give the assessor a call. That’s always step one. You can certainly do this whole process without that, but it’s not recommended. Find out where they’re coming from and show them where you’re coming from. If you can’t work something out, go on to a hearing or engage your consultant for guidance.”

Win, lose or draw, “Develop a relationship with the assessor,” he says, going as far as face-to-face meetings to advance visibility. “It’s always to your best interest. Confrontation does not work.”

Weyerhaeuser’s Tax Department makes those calls to the assessor. And frankly, says Turner, it helps to have a brand name and what she calls some “heft,” to get the assessor’s attention. “I think if you have a somewhat sizeable portfolio, there’s at least an acknowledgement that they

need to be actively reviewing these assessments,” she says.

Smith is not so sure. “I wouldn’t say it’s easier for Walmart than for smaller commercial property owners,” he thinks. “It really depends on the jurisdiction and their willingness to work with commercial taxpayers. However, most are customer-service-focused and they’re open to a conversation.”

For Hull, size and brand may matter, “but it’s a compelling and clear-cut argument that will win the day,” he says. “If it doesn’t, the government tends to default to their interests.”

That default will differ from state to state. Louisiana is one state where “the odds of winning an appeal are so low that you just don’t bother,” says Turner. “The state makes the final determination, but they’d have to override their individual assessors at the parish level.” Chalk another one up to the price of doing business.

Lease or Own? Who Is in Charge?

Does the type of arrangement you have for the property — lease or owned — change the dynamic when it comes to appeals? It all depends on the lease. “In a perfect world,” says Smith, “in terms of valuation and assessments, nothing should change, and the value should be the same no matter the ownership.”

That is, unless your property is performing crossways with the market. “Value doesn’t always rise,” he says, “and rents don’t always match the market.” And therein lies just another reason to know what is going on in your various asset locations.

More important, if you are leasing your assets, make sure there is language that spells out who handles appeals. “The key there, if you’re a tenant, is making sure you negotiate language upfront that either allows you the right to appeal or compels the landlord to do it,” says Turner.

Staying on top of assessments is not an easy task, and you won’t always win your case if there is a discrepancy. Nevertheless, that is the job, and no one interviewed for this article said that the money saved was not important.

“Don’t be afraid to challenge,” Smith urges. “Taxpayers have that right. It might seem daunting, but it’s really not. After all, residential owners do it all the time.” ▼

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As Brexit Countdown Continues, Scotland Stands Up to Be Counted

by ADAM BRUNS

adam.bruns@siteselection.com

First Minister Nicola Sturgeon on the dangers of leaving the EU and the continuing allure of Scotland for global firms and talent.

As negotiations and acrimony among EU officials and UK parliamentarians continue with the official Brexit date of March 29 approaching, leaders of the UK's devolved governments (Scotland, Northern Ireland and Wales) are among the most concerned, as the specter of physical border barriers and drastic drops in trade looms in the case of a "no deal" Brexit.

Scotland First Minister Nicola Sturgeon directly addressed Brexit concerns during a North American tour that brought her to New York in February to speak to a group of business leaders.

"Some may have seen there's a small debate about exiting the EU," Sturgeon said. "I won't attempt to explain because I don't understand it myself. Whatever happens, Scotland will remain an open and welcoming country."

"There is undoubtedly that bottleneck and companies are putting off decisions," she told me. "Notwithstanding that, Scotland is still seeing a healthy flow of investment projects. But obviously, the sooner we have clarity around Brexit, the sooner we get over company concerns."

That healthy flow of projects Scottish Enterprise has helped land in Scotland includes substantial R&D. Business enterprise R&D expenditure in Scotland in 2017 rose by nearly 14

percent to reach its highest level since 2001.

"For R&D, we actually now do better than London," Sturgeon says.

The high quality of Scotland's universities and innovation networks is central to that momentum, but there is another important factor: "We're a relatively small country, and we try to make that work for us rather than against us," she told me. "It's easy to get all the leaders in a room together and take a decision quickly. Companies value that ability."

Sturgeon continues to call for a second Brexit referendum and, perhaps, a second vote for Scottish independence. Meanwhile, she too is busy making post-Brexit plans. Two weeks after New York, she was in Paris to open a new Scottish government office.

"Scotland and the Scottish Government is committed to the European Union," she said, noting that 13,000 French citizens now live in Scotland. "We will always make it clear that EU citizens are welcome," she said. "In fact, in the coming months, we plan to step up our efforts to encourage EU citizens to stay in Scotland."

The message to citizens and firms in the EU and beyond was clear: Even if the UK shuts the front door, Scotland is happy to leave the guest house door unlatched. ▼

Photo courtesy of Scottish government



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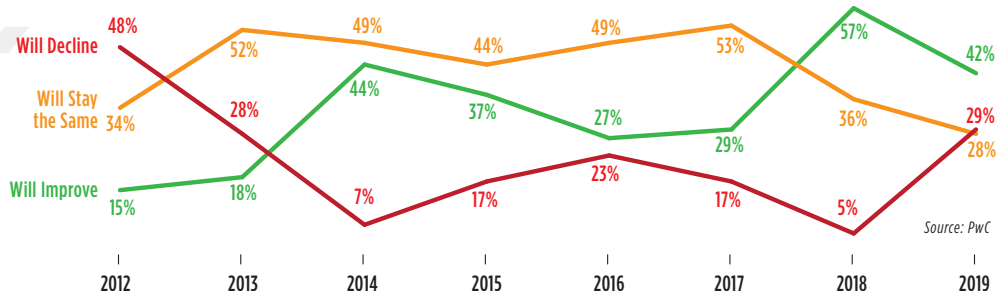
I've been wondering what **that special place in hell** looks like for those who promoted Brexit without even a sketch of a plan how to carry it out safely."

— Donald Tusk, President, European Council, February 6, 2019

Rumblings from the C-Suite

What a difference a year makes. Nearly 30 percent of business leaders believe global economic growth will decline in the next 12 months, six times the level of pessimism expressed last year by 1,300 CEOs surveyed by **PwC**. "CEOs' views of the global economy mirror the major economic outlooks, which are adjusting their forecasts downward in 2019," said PwC Global Chairman Bob Moritz. The most pronounced shift was among CEOs in North America, where optimism dropped from 63 percent in 2018 to 37 percent.

CEOs, do you believe global economic growth will improve, stay the same or decline over the next 12 months?



2 Poland: Mercedes Bets

Mercedes-Benz Cars is doubling down on a major investment in Jawor, Poland, where it's planning to build a battery factory at the site of its newly completed engine plant. "We will produce batteries on our own, which we consider a significant success factor in the era of electric mobility," said Mercedes-Benz executive Markus Schäfer. The company says it will purchase cells from suppliers to produce battery packs at the plant for its new electric EQ vehicles. The \$230-million investment is expected to create 300 jobs.

3 New Port for Bangkok

APM Terminals, part of **A.P. Moeller-Maersk**, has signed on to develop a container terminal on the Bangkok River in Bangkok, Thailand, that will have a capacity of 345,000 TEUs. APM in late January inked a memorandum of understanding with Thailand's Sahathai Terminal PLC and Mitr Sugar, which originated the venture last October. "Once developed, we expect the terminal to play a critical role in lifting trade for Thailand," says Maarten Degryse, managing director, APM Terminals Inland Services, Thailand. Mitr's chief executive says container shipping in Thailand is increasing by six to seven percent a year.

4 Driven to Drink

How about one for the road? Italy's **Carlo Ratti Associati** has popped the cork on another novel idea for the looming age of autonomous driving. Pairing with **Makr Shagr**, a producer of robotic bartenders, CRA unveiled GUIDO, a self-driving bar that could be hailed by an app. Theoretically, at least. "Currently a concept, GUIDO will be developed in the course of 2019 in collaboration with international municipalities," the company said in January.



Photo courtesy of Carlo Ratti Associati

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by GARY DAUGHTERS

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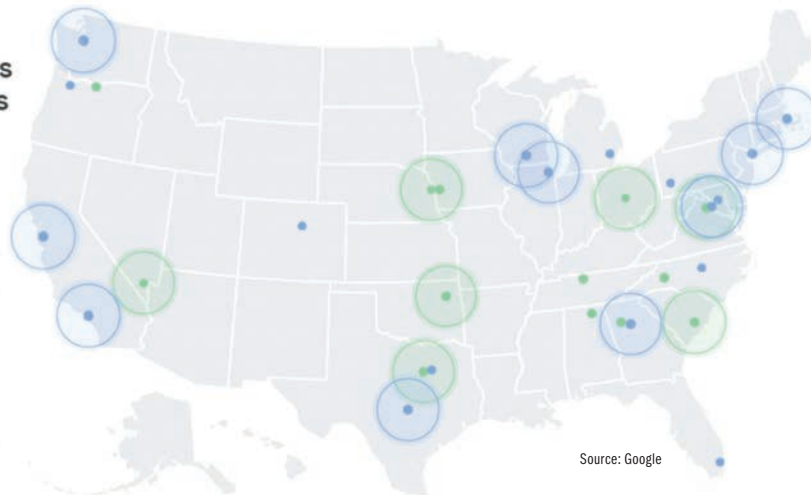
2019 Google Offices & Data Centers United States

Offices

- Existing
- New Development

Data Centers

- Existing
- New Development



Source: Google

Google's Expanding Footprint

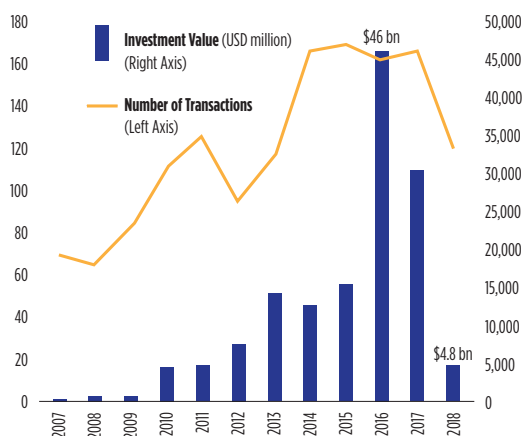
Just as Amazon's bid to put part of its HQ2 in New York was coming apart, its tech rival **Google** revealed that it's quietly sprinkling billions of dollars across states that Amazon spurned. In a February 13 blog post, CEO Sundar Pichai revealed that Google is investing more than \$13 billion this year in data centers and offices in 14 states.

"These new investments will give us the capacity to hire tens of thousands of employees, and enable the creation of more than 10,000 new construction jobs in Nebraska, Nevada, Ohio, Texas, Oklahoma, South Carolina and Virginia. With this new investment, Google will now have a home in 24 total states, including data centers in 13 communities. 2019," Pichai wrote, "marks the second year in a row we'll be growing faster outside of the [San Francisco] Bay Area than in it."

Among the highlights:

- New data centers in Nevada, Ohio, Texas and Nebraska;
- New office buildings in Texas and Massachusetts;
- Expansion of New York campus at Hudson Square;
- Major expansions that will double Google's head count in Georgia and Virginia, with new offices and data center infrastructure in both.

Chinese FDI Transactions in the U.S.*



Source: Rhodium Group. *Includes completed M&A transactions with over 10% stake and consummated greenfield projects with a value of more than \$500,000.

2

Skidding to a Halt

That smell of burning rubber is China slamming the brakes on investment in the United States, now at its lowest level in seven years. Chinese FDI in the U.S. declined to \$4.8 billion in 2018, down 90 percent from the record year of 2016, according to a year-end report by the **Rhodium Group**, which analyzes global economic trends. Counting a \$13-billion divestment of U.S. assets, Chinese FDI was net negative in 2018. The outlook for 2019, says Rhodium, looks much the same, with Beijing tightening controls on outbound capital and Washington ramping up scrutiny of major Chinese investments through the Committee on Foreign Investment in the United States (CFIUS).

3 Maine Has Cause to Celebrate

Listed on the Nasdaq exchange in early February, newly formed **Covetrus**, an animal health technology firm, plans to bring 1,200 new positions to downtown Portland, Maine, where the company is building a five-story headquarters. Formed by a merger of Vets First Choice and a division of Henry Schein Animal Health, Covetrus becomes Maine's biggest public company, with annual revenue of some \$4 billion. Covestro's new 170,000-sq.-ft. (15,793-sq.-m.) home will be the biggest building in 25 years to be constructed on the Portland peninsula.



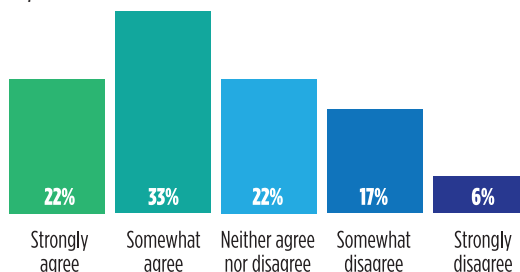
4 Need a Lift?

It went straight up, it hovered, then it came back down. All by itself. In January, **Boeing** successfully tested its electrically powered, self-flying taxi, officially called the autonomous passenger air vehicle (PAV). The short flight in Manassas, Virginia, was a milestone in the race to develop on-demand autonomous air transportation. "In one year, we have progressed from a conceptual design to a flying prototype," said Boeing Chief Technology Officer Greg Hyslop.

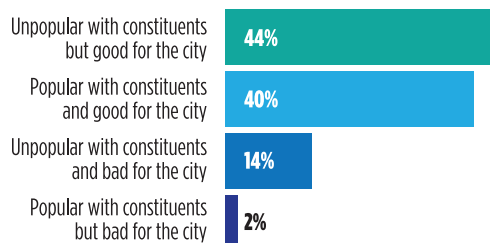
5 Study: Mayors Still Embrace Incentives

Amazon's highly fraught breakup with New York City has renewed public debate about the costs and benefits of business recruitment incentives. In public, many elected officials lament that proffering incentives, if aggravating, is essential to remaining competitive. But **Boston University's Menino Survey of Mayors**, based on 110 interviews held during the summer of 2018, finds that 84 percent of U.S. mayors view financial incentives for economic development as good policy. Further, 55 percent agree that the city that wins a competition to recruit a company or facility sees net gains in the long run.

When multiple cities compete to recruit a large company or facility, the city that wins the competition sees clear net benefits from the investment in the long run.



In general, recruiting jobs and investment to your city with financial inducements is:



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Inflection Point

New labor market intelligence and a new vision are set to propel San Bernardino County to the next level.

by ADAM BRUNS
adam.bruns@siteselection.com

Photo: Getty Images

The beauty of living and working in Southern California's San Bernardino County is its logistics-centered workforce, says B.J. Patterson, CEO of Pacific Mountain Logistics. "What I can find from an experience standpoint is often better than in other areas. That's the draw," he says.

The U.S. Navy veteran today heads the third-party logistics provider with a large facility in San Bernardino, not far from Ontario International Airport (ONT). He also sits on the San Bernardino County Workforce Development Board (WDB), which early in 2019 launched a new Workforce Roadmap in conjunction with the county's Vision2Succeed Initiative (www.vision2succeed.org), designed to engage the community in a way that strengthens the skills of the local workforce, prepares



them for career opportunities and supports and attracts business.

The roadmap came from research found in a new Labor Market Intelligence Report (LMI), published by the WDB in collaboration with the UC-Riverside Center for Economic Research and Development, which showed that San Bernardino County is experiencing an annual net migration of 25,000 people and has added more than 130,000 jobs since 2010 — a 27-percent growth rate.

Logistics is at the heart of that growth, as the region experiences record demand for industrial space. Tenants across multiple industries “have identified this market as a strategic location for growth,” according to a recent release from AXA Investment Managers - Real Assets, as the firm, along with Bixby Land Co., acquired a Class A industrial building in San Bernardino for \$33 million.

But manufacturing has grown jobs by 22.5 percent since 2010. And therein lies much promise, as automation and goods movement converge in Southern California. Could

“If you’re going to be in logistics, there’s no better place to be than here.”

— B. J. Patterson, CEO, Pacific Mountain Logistics

San Bernardino County have the right mix to manufacture and service the automation technology that’s entering the logistics arena faster than a delivery truck trying to beat the FedEx cutoff?

“Absolutely,” says Patterson. “That’s why vocational education is really important. There’s this myth that automation is somehow going to cause unemployment. I don’t think that could be further from the truth.”

His firm already takes advantage of partnering with area community colleges such as Chaffey College to gain access to interns and apprentices pursuing certifications. And he’s been suitably impressed.

“The young kids today at my company are not afraid of anything,” he says. “They were born in the age of technology. We’re rolling

out a new system that will run our company, and the young ones, with very little training, are on it. They dive right in. They’re not afraid. It’s amazing how quickly they adapt ... They’re willing and more than excited to do multiple things. Flexibility is key in our industry — you might do X today, Y tomorrow and Z the next day. They enjoy that.”

With automation comes a whole new set of jobs that require a different level of certifications. “Electricians, millwrights, mechanics, electro-mechanics. Those jobs are high-paying too — between \$75,000 and \$85,000 a year — and there’s going to be a lot of them.”

‘Precipice of Change’

That’s where the Workforce Roadmap comes in. In addition to offering labor market intelligence, it will provide asset mapping and real-time economic data to help businesses and stakeholders better understand not only what has taken place in the county, but where the county is going.

“The only way to close the skills gap is to become predictive in nature, rather than reacting to changes after they’ve happened,” says Reg Javier, San Bernardino County Deputy Executive Officer, Economic and Workforce Development. “We know the number one driver of business and success is talent availability and acquisition. We want to mobilize an entire system and region around the talent production that will be driving that growth, as opposed to reacting to growth that happens to us.”

His best example jibes with Patterson’s observations from the field:

“We know our largest industry sector by far is logistics, distribution and warehousing, and that it is also susceptible to automation,” Javier says. “If we have a good portion of our largest industrial sector adopting technology, we will be one of the largest purchasers of that technology in the world. That means those machines will need maintenance, parts and so forth, so there is a natural push in the marketplace to be close to the customer. They’ll start locating here, then the manufacturers of those machines will locate here ... you can almost see this diversification happening because of our roots.”

Javier himself has pulled up the roots. Like many in the county, he is a transplant.

“People ask me why I came here,” he says.



SELECTED FINDINGS: SAN BERNARDINO COUNTY LABOR MARKET INTELLIGENCE REPORT, JANUARY 2019

- From 2010-2017, San Bernardino County wages grew by 16% compared to 25 percent for all of California. In 2017, the average annual wage paid by the county's employers stood at \$43,033, compared to \$65,492 for the state.
- From 2010-2017, the number of warehousing jobs (representing 9% of total employment) has nearly doubled, growing from roughly 35,000 to nearly 69,000.
- In 2017, roughly 272,000 residents commuted to neighboring counties for work each day, with Los Angeles County attracting roughly 133,000 of them.
- At the same time, roughly 198,000 workers commuted from neighboring counties into San Bernardino County for work each day, with Riverside County accounting for roughly 116,000 of them.
- From 2010-2017, the health care sector grew by an impressive 59 percent in the county, adding around 38,000 jobs. Health care is expected to make the largest contributions to job gains in San Bernardino County over the period from 2018 to 2028.

"What I found was that San Bernardino County is on the precipice of real evolution and change. We have phenomenal leadership. Our county government is extremely progressive. Leaders at organizations in the community and in the school districts, are doing amazing work. I decided to come here because I wanted to be part of that, be a catalyst, and bring those folks together. We're seeing the emergence of a really bright future."

The county could hit that sweet spot where workforce development intervention fills a gap."

— Alysa Sloan Hannon, Manager, Sustainable Growth and Development, UC-Riverside School of Business Administration Center for Economic Forecasting and Development

Adam Fowler, manager of Public Policy Research at the UC Riverside Center for Economic Forecasting and Development at the School of Business Administration and a co-author of the LMI, agrees that the county has "a laundry list of nice opportunities to be leveraged across many dimensions," as the county's wealth of logistics operations blossoms alongside growing public resources at ONT, at the Ports of Long Beach and Los Angeles and in the county's population centers.

Those improving infrastructure assets also include sometimes overlooked players: the area's two Class I railroads, Union Pacific and BNSF.

"The railroads have done remarkable work improving their level of service, to where we can get to Chicago in three days, faster on a train than a truck," says Patterson of Pacific Mountain Logistics. "It's a minor miracle."

"We took a deeper look at the four core industries — warehouse, transportation, manufacturing and health care," says Fowler's co-author Alysa Sloan Hannon, manager, Sustainable Growth and Development, at the UC-Riverside School of Business Center for Economic Forecasting and Development. "San Bernardino County does face certain challenges around relative wages and educational attainment levels. But thinking about those industries, broader challenges and rapid technology advances, the county could hit that sweet spot where workforce development intervention fills a gap."



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

In-Migration Up, But Commuting Is Too

Filling gaps is on everyone's mind, including the gap in daily life caused by big commutes.

The past several years have seen an impressive influx of people: Between 2013 and 2017, more than 100,000 Los Angeles residents moved to San Bernardino County.

Javier points to an exodus from urban cores as well as the aging of a millennial generation looking for quality of life and a house they can afford. They find it in San Bernardino County, where home prices are 60 percent less than in neighboring Orange County and 50 percent less than in neighboring Los Angeles County.

At the same time, however, some 250,000 workers leave the county every day to work elsewhere. That's not a big worry given that the county is near two huge metro areas. But it's worth asking what kinds of work they're leaving for, and looking at ways to keep workers around — including such things as a firm-by-firm scrutiny of wages (county wages are demonstrably lower than its neighbors) and development of lifestyle amenities that will attract employees to live and work in the county.

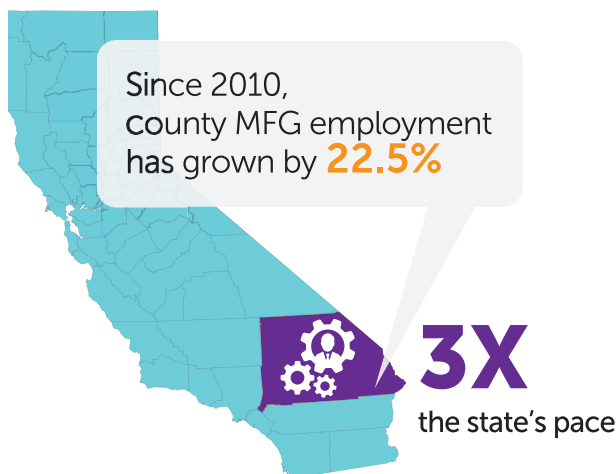
"Lots of people may not be changing where they work," says Fowler, "but are making a home in San Bernardino County, and show up in the data as super commuters [over 90 minutes each way] who still have economic ties in Los Angeles County ... so it is providing opportunities for folks wanting to own a home in the area."

They'll be glad to hear this then: "We have 100,000 housing units planned," says Javier. As they're built, they'll be added to a new asset map and real-time data that are part of the WDB's program, tracking everything from job search and employment services to demographic and educational attainment data.

The LMI found that if San Bernardino County had the same labor force participation rate (LFPR) as the comparison regions next door, there would be an additional 33,000 to 108,000 workers in the County's labor force. One finding in the manufacturing sector is especially promising: From 2012-2017, the number of manufacturing workers commuting from Los Angeles County to San Bernardino County doubled.

Clean Tech Next?

Meanwhile, youths between 16 and 24 have a higher LFPR than their coastal counterparts, the study found. They're the target audience for the



county's Generation Go! program, which exposes those young people to occupations they may never even have heard of. And that could lead to opportunities that are new to everyone.

"We found that the regulatory environment and this idea around green and clean regulation was a real opportunity in terms of competitive advantage regionally," says Hannon.

After all, Fowler explains, the progressive environmental regulatory framework in California involving pollutants, emissions from goods movement and manufacturing put it more on par with the rest of the world than the rest of the United States. As such, "it's a race to figure out those new ways of doing business," he says. "Because a lot of the global economy is playing by the rules California is playing by now, it gives us the ability to both figure it out in an industry-specific context, and to be a leader in exporting that knowledge around the globe."

He cites a recent visit by a Chinese delegation to learn about clean trucking initiatives around the ports.

With health care as an outlier, all the other target industries in San Bernardino County will see changes in their environmental footprint in the near future.

Hannon says she and Fowler were challenged to think about how the county gets to that proverbial "next rung up" on the economic ladder. They think clean tech could be one path forward — almost like a career pathway for an entire region.

"Use clean and green to train workers cross-sectorally," she says. "Particularly around goods movement, there is a lot of activity around clean and green."

"Harnessing that expertise," she says, "could be a strategy for workforce development." ▼

Foreign, Trade Policy Are ONE in Budapest

by MARK AREND

mark.arend@siteselection.com



On February 11th, U.S. Secretary of State Michael Pompeo was in Budapest, Hungary, where he met with Prime Minister Viktor Orbán; Foreign Minister Péter Szijjártó, whose portfolio includes economic development; and others. The Secretary was in Central Europe shoring up ties with U.S. allies in the region that don't make economic and political headlines to the degree their larger, western EU counterparts do. Pompeo was no doubt impressed with Péter Szijjártó's grasp of all things security, defense, economic development and trade-related.

He should be. Szijjártó, 40, is a rising star in European politics whose approach to economic and foreign affairs is increasingly admired — and being implemented — in comparably sized countries. A former registered futsal player, Szijjártó has served in the Hungarian Parliament since 2002. In fall 2018, Site Selection Editor in Chief Mark Arend met with Minister Szijjártó at Hungary's consulate in New York. Following are highlights of that discussion.

Your title — Minister of Foreign Affairs and Trade — suggests a rather broad portfolio. Typically, these are separate functions or ministries. Explain the rationale behind linking the two.

Minister of Foreign Affairs Péter Szijjártó:

Hungary has a very open economy. Our export-over-GDP ratio is about 90 percent. The FDI per capita is US\$8,600 — it's very high. Overall FDI stock is €86 billion. External factors play an extremely important role when it comes to the economic performance of the country. We are a small country, and no one really expects us to offer solutions to global issues. That's why I recommended to the prime minister that we use our structure of foreign policy to serve the national economic interest, and to give an economic focus to the foreign policy itself.

Institutionally, this was expressed in a way that foreign affairs and economic relations were put under one portfolio. In Hungarian, my title is Minister of Economic Relations and Foreign

Budapest in the evening

Photo courtesy of the Hungarian Ministry of Foreign Affairs and Trade

Affairs — sequencing counts. That means foreign affairs must serve the national economic interest. The main function is help Hungarian companies be successful in external markets and to attract the best possible investments to Hungary. All government policies, including foreign policy, must serve the goal of making available more and more prestigious jobs for the Hungarian people.

How does this translate into practice at Hungary's embassies and consulates around the world?

Szijjártó: I am a man of figures, and I would rather believe in facts and figures than in perceptions. Since 2014, when we merged these portfolios, we have broken all external related economic records, year after year — investments, jobs created — every year. Last year [2017] was the first year ever Hungarian exports



Péter Szijjártó,
Minister of Foreign
Affairs and
Trade, Hungary

exceeded €100 billion; GDP is about €130 billion. Also that year, 96 major investments came to the country through our investment promotion network. The previous record was 71 the year before that. [2018 saw 98 projects land in Hungary — *Ed.*] I told my ambassadors at the very beginning that they would not be judged by me based on the number of receptions you take part in, but rather on figures related to helping us attract investors to Hungary, and on whether they helped some Hungarian companies gain more market access.

In all of our embassies around the world, there must be at least one economic consular. In Germany, we have four, and in the U.S. we have six. A lot of foreign minister friends of mine ask me for this recipe. The foreign minister of Tunisia, for example, wants to reorganize their system the way we are operating, so my deputy

foreign minister spent a day there giving a presentation to them about how it works. Some in the embassies see this role as a merchandiser, as a downgrade. But it is an upgrade if you have more concrete tasks in helping your country's interests get reached in the international arena.

How personally involved do you get in inward capital investment negotiations?

Szijjártó: 100 percent. I usually negotiate with foreign investors directly. And I'm very happy to do it. I made a lot of effort to attract some people from the business world to work for me. Our current ambassador in Washington, for example, Dr. László Szabó, was CEO of Hungarian pharmaceutical company TEVA, and before that was vice president at Eli Lilly in the U.S. The current president of the investment promotion agency was Hungary country director for Nokia. The investors have more trust in them.

I very recently negotiated for 14 months with

“In Hungarian, my title is Minister of Economic Relations and Foreign Affairs – sequencing counts.”

BMW about their new factory in Hungary. And I'm in continuous dialogue with the highest-ranking leaders of the big investors in Hungary. I always want to collect experiences from them. It's easier to ask them what they think should be modified, what kind of legislative acts should be made, which amendments should be pushed through in order to make the environment more competitive.

What do investors tell you about their experience of investing in Hungary?

Szijjártó: What they like in Hungary is the low taxes, for sure. We have a flat tax in Hungary, both corporate and personal. Our personal tax rate is 15 percent, and our corporate income tax rate is 9 percent. I proposed this 9 percent to the prime minister based on American inspiration.

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CZECH LIST: INVESTORS ADD R&D, TECH CENTERS TO LOCATION REQUIREMENTS

Silvana Jirotková is back at work at CzechInvest, the Czech Republic's investment promotion agency — this time as CEO. She started at the agency in 2002, just 10 years after it was established, and spent some time in the private sector before returning in 2014. In late 2018, Site Selection Editor Mark Arend spoke with Jirotková at the end of her visits to Washington, D.C., and New York, part of which was to celebrate the 100-year anniversary of Czech independence.

At the time, CzechInvest was beginning the process of merging with CzechTrade, the export agency, broadening CzechInvest's service offerings. Jirotková's time with the agency is a good measure of how its mission is evolving.

"The agency at first worked to attract projects of all sizes, particularly those creating large numbers of jobs," she relates. "More recently, it is focusing on R&D activities, technology centers — more sophisticated projects. Most of the projects we work now are expansions of existing facilities, usually adding a shared services center or R&D or a business services center."

Honeywell Finds Engineering Sweet Spot

Honeywell, one of the largest U.S. investors in the Czech Republic, is a good example. In 2015, it opened new research and development laboratories at the Honeywell Center of Excellence in Brno. The company, which employs about 5,000 in the country, also announced plans to open another five laboratories as a part of a \$10-million investment in the region.

The 13,000-sq.-m. (nearly 140,000-sq.-ft.), state-of-the-art laboratories and office space, operated by Honeywell Technology Solutions (HTS), a technology development and engineering arm of Honeywell, added 300 new jobs for local engineering talent in

the region. Engineers develop new products at the facility for Honeywell's Aerospace, Home & Building Technologies and Safety & Productivity Solutions divisions; it is one of only four such centers Honeywell operates globally. Brno also is home to a Honeywell manufacturing plant.

"The South Moravia Region is well known as the Czech Silicon Valley and has an abundance of high-quality engineering talent in addition to excellent infrastructure," noted Jirí Tomíček, general manager, Honeywell Technology Solutions, at the time.

"Through this investment, Honeywell has demonstrated its commitment to growth and development in the Czech Republic and the continued contribution to the creation of the company's most important European R&D base in the region."



Silvana Jirotková

Where FDI Is Migrating

Germany, Japan and the U.S. are the biggest sources of capital investment in the Czech Republic, with much of that investment going to the automotive sector.

"We have had strong ties with our Japanese colleagues from the very beginning," says Jirotková. More than 250 Japanese companies now are operating in the Czech Republic.

As these and companies from other markets invest in capital projects in the Czech Republic, quality is replacing quantity where workers are concerned. Software developers, engineers and research experts are eclipsing production floor workers as the most in-demand labor segment.

"The Czech Republic has developed a strong infrastructure of R&D centers," says Jirotková. "Together with the universities, they cover the key sectors and activities — artificial intelligence, robotics, nanotechnology, automotive and life sciences, IT and cybersecurity, for example." A sector now taking root in the Czech Republic about which much will be written in the coming years is aerospace. GE Aviation already has sited its turboprop development, testing and engine production facility in Prague.

— Mark Arend

When I understood that President Trump would carry out the most patriotic economic policy ever, I understood that I have to give additional arguments to the investors in Hungary to stay. About 1,700 U.S. companies operate in Hungary, employing 105,000 people. This is the only single-digit corporate tax rate in Europe. We introduced it in 2017 — in 2016 we had 71 big investments and in 2017 we had 96, which shows the significance of this change.

Also, they benefit from a wide variety of cash incentives. In the western part of the country we can finance up to 25 percent of the volume of the investment in cash. In the eastern part we can finance up to 50 percent of the volume of the investment in cash. The difference is because the western part is much more developed, with a roughly zero percent unemployment rate. On the eastern side, we still have capacity. In Budapest

we can only finance R&D-related investments.

They like the very flexible labor code in Europe, which takes into consideration the interests of both employers and employees, which is a rare phenomenon.

They put forward as a challenge the full employment in the country. When we came into office in 2010, the unemployment rate was 12.5 percent. Now it's below 3.5 percent. This definitely poses a challenge, but a good one. The way we address this is the restructuring of higher education. We are radically increasing the number of state-financed seats for engineering, mathematics, IT and related fields. And we have introduced the German type of vocational training in the high schools already. Those students can be involved in a curriculum put together by companies. When they leave school, they will have the necessary skills.

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We have introduced a broad scheme of training subsidies — up to €3,000 per capita for the companies. If they train their own employees, then we finance it. We are now preparing a new set of measures together with the Minister of Innovation and Technology where we will end up in a more flexible regulation of the labor code. That's how the labor pool will be widened.

fiscally, you have to be extremely disciplined. There are countries in the western part of Europe that cannot get rid of this welfare state concept, that base their budgets on fiscal irresponsibility and on huge wealth redistribution. No wonder they cannot decrease tax rates. Instead of carrying out disciplined budgetary policies so they can cut taxes, they try to put pressure on the Eastern Europeans to increase our tax rate,

“It is not for free that we are able to decrease taxes. In order to do that fiscally, you have to be extremely disciplined.”

How are economic, fiscal and other forces at work elsewhere in Europe affecting Hungary's agenda for prosperity?

Szijjártó: There are some efforts coming from the western part of Europe — countries that understand that they are losing the competitive advantages compared to central Europe — they are pushing for things like tax harmonization, which we totally object to. It is not for free that we are able to decrease taxes. In order to do that

which is unacceptable. Since something like tax harmonization requires a unanimous decision, it won't happen.

In order to have a strong Hungary we need a strong European Union. We have a 90 percent export-over-GDP ratio, and 79 percent of our export goes to the EU. Trade between Germany and the four countries of Poland, Hungary, Czech Republic and Slovakia in 2017 was 60 percent higher than trade between Germany and France. Trade between these four countries

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and Germany was twice as much as German-British and German-Italian trade. The Central European countries basically became the backyard of German industry, which is the backbone of the European economy. We are so strongly interlinked with the German economy that it is extremely important for us to have a strong EU and a strong German economy, and these are helping Hungary.

Automotive manufacturing has been the backbone of Hungary's industrial economy for many years. Is Hungary too dependent on this sector?

Szijjártó: Until now, we have been in a period of what we call Made in Hungary. Now we are stepping into a period we call Invented in Hungary. We understand that there is a global industrial revolution going on resulting in technologies in use on a daily basis that would not have been imaginable a couple of years ago. These technologies will be the core basis of competitiveness and of success. It is great luck, then, that our economy is based on the automotive industry, because automotive leads this new revolution.

Since we have very strong automotive capacities in the country, these companies are basing their research and development functions in Hungary based on their very good

experience with manufacturing so far. Having such a robust presence of the automotive industry helps Hungary to be a flagship of this new digital economic era. This is a huge opportunity for success. Currently, 29.3 percent of industrial output comes from the automotive sector, and the biggest companies now are locating their R&D facilities for electromobility and autonomous vehicles to Hungary. We are now building a test environment that will be unique in Europe. Their autonomous driving will be able to be tested not only under highway circumstances but in urban settings as well. We're building a ghost city where all kinds of events and developments will be produced to match what can happen in real life. Traffic lights, pedestrians, cars coming from here and there ... it's unique, and the automotive companies like that. Audi has located production of its electric engines to Hungary, for example. The robust presence of the automotive industry is an advantage.

Also, the number of jobs created in various other sectors of the economy because of the presence of automotive is similar. More companies are placing their shared services centers in Hungary because they understand that the level of technology, the added value, the knowledge of language, the very international environment associated with the automotive industry are very helpful. ▼



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by MARK AREND
mark.arend@siteselection.com

No longer is China simply the second largest cosmetics market in the world. It is now a leading center of the health and beauty industry, most demonstrably in the Fengxian District south of Shanghai's central business district in the heart of the Yangtze River Delta. In recent years, dozens of global cosmetics manufacturers have established manufacturing, testing and research centers in Fengxian, earning it the moniker "Oriental Beauty Valley" — a distinctive industrial cluster of health and beauty operations. Besides cosmetics, the Oriental Beauty Valley supports biomedicine, health-care products, sports and leisure products and their upstream and downstream industries.

The Oriental Beauty Valley has been certified as the Capital of China's Cosmetics Industry by the China National Light Industry Council and the China Association of Fragrance Flavour and Cosmetic Industries. Fengxian is the only region in China with this status. The Fengxian District



is building a series of platforms for the Oriental Beauty Valley, including 100 subsidiary business parks and other infrastructure designed to express on the outside the beauty-related development and production of products inside the new facilities.

Builders of Beauty

In 2017, Cosmax Inc., a South Korean cosmetics material developer and original design manufacturer (ODM), opened up its third factory in Fengxian, increasing its annual output capacity in China to 550 million cosmetic products. The new 37,750-square-meter facility alone is capable of turning out 200 million beauty products a year. Cosmax became the first among ODMs to make a foray into the Chinese beauty market in 2004. Its Chinese operation has been growing at an average rate of 40 percent ever since. Its strategy to separate production of skincare and makeup products in Shanghai and Guangzhou has worked. Over 85 percent of its total shipments go to consumers in China.

Other companies taking advantage of the Oriental Beauty Valley's cosmetics industry ecosystem include Nu Skin, JALA, Pechoin and Interfila, Estée Lauder, L'Oréal and

Yingteli. Biomedical companies include Kaibao Pharmaceutical, Hutchinson MediPharma and Leiyunshang Pharmaceutical.

In 2016, Shanghai Pechoin Daily Chemicals Co Ltd announced plans to install 16 production lines valued at 300 million yuan (US\$44.38 million) in its 33,300-square-meter Fengxian factory in space with an annual output value of over 3 billion yuan (US\$443 million), including 200 million yuan in tax. Shanghai Hutchison Pharmaceuticals has put a new factory nearby into operation at about the same time. The factory is making a popular Chinese medicine She Xiang Bao Xin Pills for coronary heart diseases. Pechoin and Hutchison are among a number of companies operating in Shanghai Comprehensive Industrial Park in Fengxian. The park is in the core area of the Oriental Beauty Valley.

Fengxian District makes available several incentive programs for investing companies. These include real estate subsidies for workers with master's and doctorate degrees, subsidies for large corporations establishing regional headquarters in Fengxian, funding for research and development, and substantial financial subsidies for companies registered in the Shanghai Securities Regulatory Bureau. ▼

This Investment Profile was prepared under the auspices of the Investment Promotion Bureau of Fengxian District, Shanghai. For more information, visit www.fengxian.gov.cn/shfx/subtzhfx/.

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Investment Promotion Bureau of
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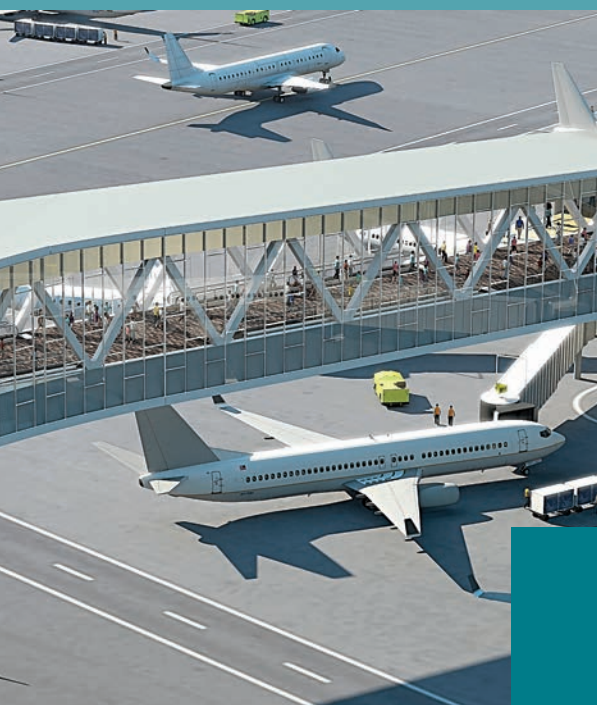
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New York State has committed \$150 billion to mass transit, affordable housing, schools, parks, and sustainable energy. Another \$100 billion has already been put to work rebuilding roads, bridges, tunnels, and airports, including a plan to transform JFK International Airport into a 21st-century hub and a redesign of LaGuardia Airport. In addition, the Build Now-NY program offers Shovel Ready Certification for high-tech manufacturing, warehouse distribution, logistics, and multi-tenant business and technology parks.

**\$150 BILLION INVESTMENT
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STRONG BUSINESS ECONOMY

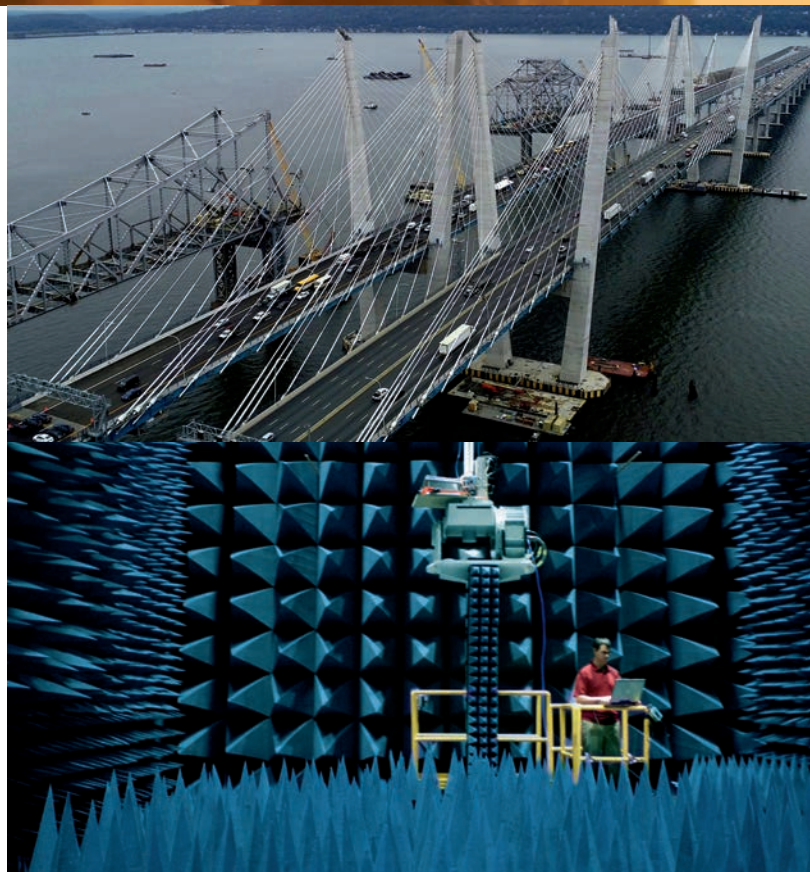
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As part of its plan to revitalize the state, New York has invested heavily into workforce education and training to provide skilled talent to the most competitive industries of the 21st century. That training builds on a pipeline of talent from the state's top-tier educational institutions.

The proof is in the performance, attested by a bevy of positive rankings. New York now ranks:

- No. 1 in the Northeast for STEM grads.
- No. 2 in the U.S. for physical science undergrad and doctoral degrees.
- No. 2 in the nation for highest number of residents who are scientists and engineers.
- No. 3 in the U.S. in number of engineering students.
- No. 3 in the country for high-tech employment.
- No. 3 in the country for college enrollment in a degree-granting institution.

New York's educational strengths include the 64-campus State University of New York, the largest comprehensive public university system in the U.S., and New York is the only state with

by RON STARNER

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more than one Ivy League university, as it is home to both Cornell and Columbia.

The state is also home to the nation's first tuition-free degree program, the Excelsior Scholarship, which feeds talent to growing businesses in New York. Scholarship recipients pledge to remain in New York after graduation, ensuring that thousands of freshly minted millennial grads will pursue productive careers in places like Syracuse, Binghamton, Buffalo, Albany, New York, Long Island, Yonkers, Corning, Plattsburgh and Watertown, among others.

"Last year's launch of the first-in-the-nation Excelsior Scholarship program enabled an unprecedented number of New York's students access to a college education," said Dr. Guillermo Linares, acting president of the New York State Higher Education Services Corp. "This year, with Excelsior Scholarship's expansion, we can truly say that a college degree is more attainable than ever for all New Yorkers."

In addition, New York is a preferred location for clean energy companies. Recently, New York State committed \$15 million to SUNY and \$275 million total for clean energy workforce development and training programs.

With 4 million millennials already employed in the state's workforce, it's no wonder that so many tech firms are making the call to locate in New York. ▼

Learn how New York can help your company grow at <https://esd.ny.gov/>



Between the Barley

Follow the malt-shopping footprint of a little-known global giant.

It's the original Champagne of beers. Created in the Champagne-Ardenne region of northeastern France, Groupe Vivencia today is an international cooperative of 11,000 member farmers whose reach extends across 34 nations and encompasses 7,500 employees. Aiming to control the entire grain value chain, the group's operations stretch from farming to malting to baking and were responsible for €3.2 billion (US\$3.6 billion) in turnover in the most recent fiscal year.

Among its most active divisions is Malteurop Group, which among other strategies seeks to connect barley producers with the exploding number of craft brewers in the world. But there's an eating-vs.-drinking issue.

"Overall production of malting barley is decreasing worldwide and is concentrated in certain geographical zones," says the company. "Barley is in competition with other cereal grains in

a context of worldwide demographic growth and increasing needs for cereal grains to feed a population of 9 billion in 2050."

At the same time, certain areas seem to be drinking more beer, but not supporting that with their own malting. China is Exhibit A, as the People's Republic in 2013 consumed 4 million tons of malting barley but produced less than 1 million tons, as policies encouraged growth of other grains. Vietnam is another example: People are drinking plenty of beer, but not growing the beer supply chain.

Other countries are the reverse: Australia only processes 1 million tons of malting barley but produces 3.5 million tons, while the EU processes 9 million tons but produces 11 million tons.

Evolution of a Global Supply Chain

As craft brewers in the U.S. alone more than doubled in number between

2013 and 2017 to surpass 6,200 and contribute more than \$76 billion to the economy, Malteurop aims to close the gaps between the barley and the beer.

The company's annual capacity of 2.2 million tons of malt encompasses 14 countries in Europe, North America, Oceania and Asia, with 27 industrial sites and 1,183 employees. A total of 1.5 million tons of malting barley is grown in Europe alone, where Malteurop predecessor cooperative La Providence Agricole opened its first malting plant in the 1960s in Port Colbert in Reims, France.

Expansion into other French sites followed, then the portfolio grew through both acquisition and organic expansion to sites in Spain, Germany, Argentina, China (in 1996), Ukraine and Poland.

A big boost came with the 2008 acquisition of ADM Malting. Plant locations include Great Falls, Montana;



& the Beer

by ADAM BRUNS
adam.bruns@siteselection.com

Photos 1-4 by Guillaume Czerw courtesy of Groupe Vivescia; photo 5 of Six String Brewing Co. in Erina, New South Wales, Australia, courtesy of Tourism Australia

Winona, Minnesota; and Milwaukee, Wisconsin, where in 2016 the Malteurop group's oldest facility celebrated the 150th anniversary of its founding in 1866 in "the city that is the cradle and the historic capital of beer on the North American continent," Vivescia notes.

Malteurop North America produces basic malts for brewers as well as malts for distillers. It also produces kilned caramel malts, crystal malts, roasted malts and other specialty malts. The division recently invested in a new malting plant in Great Falls, located in one of the most intensive barley growing regions in the United States.

In 2016, the Great Falls Montana Development Authority (GFDA) opened the Great Falls AgriTech Park to provide fully-served heavy industrial sites for food and agricultural processors. The region's first industrial park, it is certified by BNSF.

Great Falls is also one of four

Montana cities — along with Joliet, Havre and Ronan — that comprise the Montana Food and Agricultural Development Center (FADC) Network.

"Montana produces an abundance of high-quality wheat and barley," said Barnett Sporkin-Morrison when he took the helm of the FADC in Great Falls in January. "We grow pulse crops, we have low location costs and our governmental entities are supportive of economic development."

Asia Likes Beer

The ADM acquisition wasn't Malteurop's only growth spurt in 2008. The company also built a new plant in Seville, Spain, and acquired Russia's Belgorsolod. Then, in 2010, it acquired Italy's Diamalteria, based in Darfo in Lombardy, diversifying into malt extracts and flours for food processors.

The latest footprint growth came with the inauguration in October 2018 of the

company's Geelong site in Melbourne, Australia, expanding to 200,000 metric tons of annual capacity in order to serve the booming Asia Pacific region.

"This region, including China, currently represents more than one-third of the world's total beer market," said Malteurop Managing Director Olivier Parent. "This makes Geelong Malteurop's third biggest regional hub after Vitry, in France [245,000 tons], and Great Falls in North America [220,000 tons]."

"Our location is ideal, both close to malting barley growing regions and the country's largest deep-water dock, Australia's main export port," said Trevor Perryman, managing director of Malteurop Australia & New Zealand, of the site near Port Phillip Bay. "The aim is to export more to our current markets — Thailand, Vietnam, South Korea, and Cambodia — and go for new markets like Laos and India." ▼





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Expansion To Canada Hones Location Strategy

Listen and learn from the president and CEO of a fast-growing wholesale data center company.

by ADAM BRUNS

adam.bruns@siteselection.com

Sureel Choksi, president and CEO of Vantage Data Centers, recently talked to Site Selection about the fast-growing company's just-announced 160-MW campus in Goodyear, Arizona; ongoing expansions in Santa Clara, California, and Ashburn, Virginia; the December acquisition of Canada's 4Degrees Colocation; and how the Vantage team approaches location decision-making and facility innovation.

"We have a cross-functional team that works very closely with our customers, who are the very large hyperscale cloud consumer internet brands," Choksi says. "First, which markets are most interesting? Where do they see the most demand for their services? Where are they looking to expand their data center footprint?"

About a year ago, he says, it was determined through this process that Quebec — and Montreal in particular — was an emerging wholesale data center market attracting a lot of interest from Vantage's key customers.

"We have a cross-functional team — engineering, finance, corporate development and a couple of our executives including myself — who will go visit markets and identify sites that fit our criteria, ultimately develop a short list, and determine which site or sites are worth pursuing," says Choksi. "Once we determine a market such as Montreal is of interest to us, the site selection process involves questions around the ability to bring significant power to the site; fiber connectivity to the site; and proximity to potential sources of problems — airports, trains or chemical plants, things you want to be mindful of staying clear of. It's a team effort."

Quebec not only was the company's first foray outside the United States, it was into a Francophone province. In this case, the discovery of a strong existing firm precluded the need to go greenfield.

"We were fortunate to come across 4Degrees, which had a high-quality team with great data



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centers in both cities [Montreal and Quebec City]. We had the ability to accelerate to market in two years. All the pieces came together, and it's hard to do that."

Choksi went up to Quebec City in January to close the deal to acquire 4Degrees for US\$200 million (C\$259 million). Vantage is looking to more than double the size of the facility there due to significant demand. The transaction grew Vantage's coast-to-coast presence in North America to five markets from just two markets 12 months previous. Vantage worked with the regions' respective economic development organizations Quebec International and Montreal International as well as Invest Quebec.

"It's a very pro-business and pro-data center environment," he says of Quebec. "And with Hydro-Quebec they have a significant amount of excess power at attractive power rates. They were helpful in telling us what they can do,

and bending over backwards to get power at large scale to potentially large sites."

Are economic developers coming around to the attractiveness of data centers despite their typically low job creation numbers? Choksi says areas are starting to see the benefits of increased tax revenue, the jobs activity from Vantage customers as well as Vantage itself, and the fact that data centers have become crucial infrastructure themselves.

"The reason these data centers are being located in major metro areas is it's a vital service to the digital economy, to enable companies in those geographies to continue to grow. They have a knock-on effect, with primary, secondary and tertiary benefits to the economies of these cities."

The Vantage team has been bringing those benefits to multiple cities at once. "Organized chaos is the best way to describe it," Choksi says. "At any given time, we have a long list



Sureel Choksi

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and a short list of markets we're looking at."

The team determined in March 2018 that Greater Phoenix was a priority market. The next question was in which direction to go, as growth seemed to be in every direction.

"We looked in central Phoenix, up north, east to East Mesa, even south to Tempe and surrounding areas. Then we started to look west, where there is a significant amount of economic development occurring. Ultimately, through a process that took six to eight months, we went from having a very broad view of 'Yes, we want to be in this market' to really prioritizing where we thought the greatest longer-term opportunity is. In this case, we got really excited about Goodyear. There's a real transformation going on, with a lot of business and some tech coming in. It's an area where over the next five to 10 years there will be a tremendous amount of economic growth."

Where might the company grow next?

"The question goes back to where our customers want to be," Choksi says. "That is a continual dialogue. We now have a very strong North American footprint of six markets. Going forward, we will evaluate expansion both in the U.S. and Canada. We'll evaluate international expansion beyond Canada — where, when, how and if are all questions we need to sort out, given the investments we make in our existing markets are substantial. We typically underwrite between half a billion dollars and a billion dollars of investment over three to five years per campus."

In February alone, the company secured \$675 million in new debt and equity financing, and completed its 142-MW campus in Virginia. When it comes to final project location choices, he says, "Ultimately, those we choose to pursue are substantial." ▼

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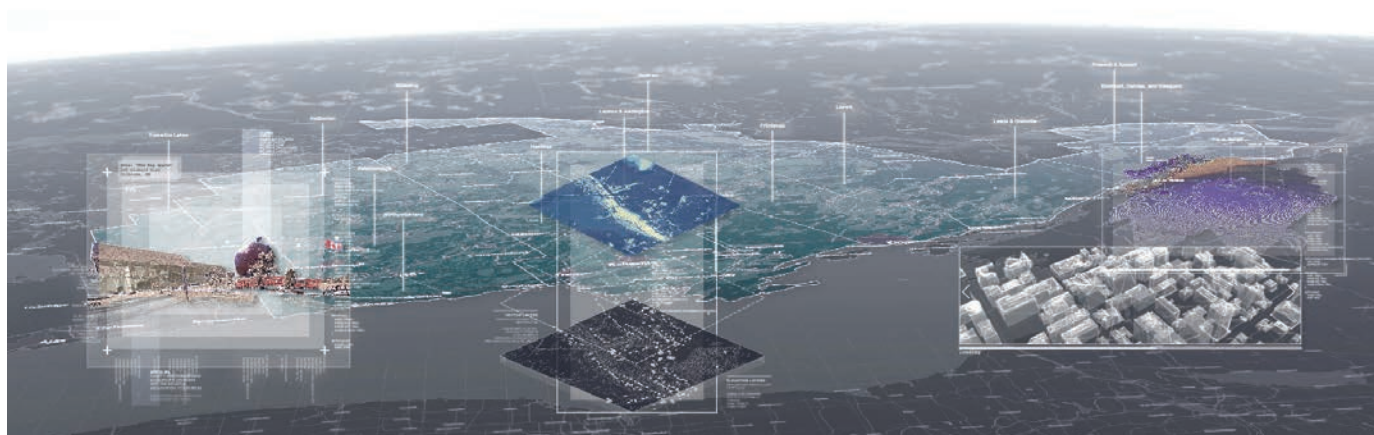


Image courtesy of CIMS

A new asset mapping tool for eastern Ontario goes way beyond a parlor trick.

by ADAM BRUNS

adam.bruns@siteselection.com

Canadian Prime Minister Justin Trudeau dropped by the Ottawa-area tech capital of Kanata in February to announce that the Canadian government was investing C\$40 million in BlackBerry/QNX to support Carleton University's research leadership in autonomous systems. But that's not the only next-generation thinking going on at the 30,000-student university.

Attempts to map assets are a dime a dozen in the economic development world. But you've never seen anything like the Ontario East 3D mapping project developed by the Ontario East Economic Development Commission and the Carleton Immersive Media Studio (CIMS). Using a combination of terrestrial laser scanning, building information modelling (BIM) and open-source data, CIMS is creating a hyper-realistic 3D model of eastern Ontario (see above).

As Team Lead Martine Gallant blogged in August 2018, it started as an Asset Information Model (AIM) exercise to map out the region's agri-food assets, but quickly escalated to encompass layers and layers of economic, demographic, infrastructure and land/property data. Users can take full virtual tours of industrial parks and sites, turning corners on

buildings and zooming in on a parcel's topography.

It's all in the service of creating "a unique AIM pushing the boundaries of what it can do," Gallant wrote.

New Perspective

"We're looking at it as a key element of what Ontario East does," former Ontario East President Dan Borowec, director of economic development and tourism for Northumberland County, told me at a meeting in Toronto this winter.

The Ontario East region stretches from Port Hope — just east of Toronto — to Ontario's border with Quebec, and encompasses 46,200 square kilometers (17,838 sq. miles), including such areas as Ottawa, Brockville, Kawartha Lakes, South Dundas, the County of Renfrew, the County of Lennox & Addington and the Quebec-border community of Prescott-Russell — 13 counties in all.

The region has focused on the five sectors of "innovative rural opportunities," food processing, advanced manufacturing and technologies, logistics and transportation, and investment tourism.

But the new tool might enable companies and government officials alike to glimpse opportunities heretofore unseen. ▼

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Nanjing has the resources for businesses to transform, keeping them ahead of the competition.

by MARK AREND
mark.arend@siteselection.com

How can a business location be both ancient and ultramodern, densely populated and easily traversable, locally grounded yet demonstrably international? It's easy when that location is Nanjing, China, the capital of Jiangsu Province — and of China itself until the establishment of the People's Republic of China in 1949.

An hour west of Shanghai via high-speed train, Nanjing is the only Megacity in the Yangtze River

Delta; home to the largest inland port in Asia; and a key government, cultural, education, medical and business hub. The best part? It's not Shanghai, but it's easily within reach of China's teeming commercial center and all the assets that affords — even if Nanjing has its own array of location attributes. These include established industry clusters; an integrated, globally connected transport system that includes nine subway lines; Longtan Port; Nanjing South Railway Station,



The Xuanwu Gate at the City Wall of Nanjing, left, and Lake Xuanwu at sunrise

Photos by Mark Arend



an important high-speed rail hub, and one of the busiest airports in China — Lukou International — with nonstop flights to Europe, the U.S. and all over Asia.

Where do Nanjing's 828,000 college students study? At more than 50 colleges and universities, 75 research institutions and more than 800 national engineering technology centers. They will become part of the metro's 2.5 million strong workforce and may well end up working in one of a wide variety of economic areas and zones dedicated to promoting industry-specific enterprises. Nanjing ranks first in the number of college students per capita and second in the number of post-graduate students per capita.



Nanjing is advanced in developing and reforming and adopting new policies. The level of professionalism is very high, and that gives us a big advantage.”

— Roland Gerke, Chairman and President, BSH Home Appliances Holding (China) Co., Ltd.

Many Chinese metros have rich histories and cultural treasures, but few can match Nanjing in that department. Civilization can be traced there going back 6,000 years, and it has been a growing city for nearly 2,500 years and nearly 500 years as a capital. Nanjing is home to the longest Ming Dynasty city wall, one of the longest city walls in the world, much of which remains to this day. It is known as the Capital of Six Dynasties and the Metropolis in Ten Dynasties.

Modern day Nanjing is a Chinese and world center for several key industries in the lower

reaches of the Yangtze Golden Waterway Delta. Among them are Advanced Manufacturing, including new electronic information systems, green smart car technology, smart equipment, biomedical and new materials; the Modern Services, including software and information services, financial technology, health services and logistics; and Future Industries, including artificial intelligence, additive manufacturing and others.

Case Study

Among Nanjing's smart equipment manufacturers is BSH Home Appliances Holding (China) Co., Ltd., the corporate headquarters in region Greater China, which is functioning as a

wholly owned subsidiary of the German company Bosch. With a presence in China for more than 20 years, Nanjing is becoming a key global center of innovation for BSH, which is finishing a new headquarters in Nanjing that will be put into use in 2020.

Chairman and President Roland Gerke explains Nanjing's significance as a location: “We started in Jiangsu province in 1994 with our first investment in Wuxi at that time — to set up a factory in the classical way, as a joint venture, as a greenfield. Then we followed up by acquiring a factory in

High-speed Rail Infrastructure



Metro Rail & Highway Infrastructure



the neighboring province of Anhui in the city of Chuzhou, about 70 kilometers from Nanjing. We decided to use Nanjing as our corporate headquarters, right between these two factory locations.”

At that time, says Gerke, the headquarters location decision was between Shanghai, which was a more typical choice of international companies, or Nanjing. “We decided on Nanjing because it met the main criteria we needed to fulfill, which were logistics and travel within China — the ability to reach every city by plane or train. Nanjing was perfect because you can go everywhere and you are in part of the Jiangsu-Yangtze Delta region, catching one third of the population.”

Talent acquisition was another main concern, Gerke relates. “You want universities and research facilities in your location. Nanjing has two of the top universities with Nanjing University and Southeast University, and many others. There are more than 50 universities and technical institutions specializing in sectors like aerospace and telecommunications and so on. We get to tap in also to a pool of potential

candidates to come to work for us. It’s the right place for universities, with universities in our fields of interest — mechanical and electrical engineering. Nanjing is an international city and at different times in history was the capital. It has infrastructure for foreigners, like international schools. In the living environment, there are international communities not only in companies but in universities.”

Gerke says there have been for some time experts from German universities in Nanjing working with the Chinese on building the legal system. He says, “They oriented a lot on European law and regulations.” To this day, a partnership exists between Jiangsu and the German states of North Rhine-Westphalia and Baden-Württemberg, both home to major German industrial complexes.

“So maybe Nanjing now is not as shining like Shanghai,” Gerke continues, “but in terms of these items, it is a good choice and we do not regret it. From Nanjing you have direct flights to Frankfurt, to the U.S., to Asia. It is also convenient in terms of getting to our factories in just a two hours’ drive. We have been in Nanjing



A rendering of the new headquarters campus for BSH Home Appliances Holding (China) Ltd.

since 1997, in this building. We are now building our own headquarters building in the south of the downtown, where the Olympic stadium is, which was used for the Youth Olympics in 2014 and the Youth Asian Games in 2013.”

Up the Value Chain

BSH invested in manufacturing in Nanjing in 2004 and opened an appliance park about 20 kilometers from central Nanjing with different factories in 2005. BSH was an early investor in a national development zone and could acquire a sizable tract of land. The facility is about 360,000 square meters. “In this park we have the washing machine factory, a cooking factory, small appliance factory, our administration, warehouse and logistics. We are also building in this park our R&D headquarters. After 2009, we started also to invest up the value chain to R&D, putting the central R&D function in the appliance park. It’s now too small for what we want to achieve, so we are building another R&D facility.”

A second appliance park has also opened in Anhui province that Gerke says it’s home to two refrigerator factories, two central warehouses and a dishwasher factory. BSH is also building washing machine and dryer factories at the site. There is

still space for one or two additional factories at the site, he relates.

Nanjing and Jiangsu province will be interesting to watch, says Gerke. The province already is one of China’s major manufacturing hubs, but it is the center of an important manufacturing shift. It was once the center of chemical and steel manufacturing. The idea now is to make the area a showcase for transitioning from legacy manufacturing to intelligent manufacturing — Industry 4.0.

“We are very interested in incorporating this,” says Gerke, adding that for three years now, Nanjing has been the site of the Intelligent Manufacturing Summit. “It is important for large manufacturers, including those of us with a big footprint here, to transform into new ways of manufacturing. This includes automotive manufacturing, too, as well as LED screens and many others.” In Nanjing, therefore, these industrial players can continue manufacturing, but in ways that will make them more efficient and competitive and successful.

“Nanjing is advanced in developing and reforming and adopting new policies,” says Gerke. “The level of professionalism is very high, and that gives us a big advantage.” ▼

This Investment Profile was prepared under the auspices of the Nanjing Municipal Bureau of Commerce. For information, visit www.investnanjing.gov.cn.



Turkish President Recep Tayyip Erdoğan opened the first phase of the new Istanbul Airport on November 2, 2018. Full operations will commence in April 2019. The first phase consists of the main terminal building, two runways, an Air Traffic Control Tower and supporting buildings. When fully operational, the new airport will have the capacity to serve 200 million passengers annually. That's about twice the number currently served at the world's busiest

by MARK AREND
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Istanbul Airport
concourse rendering
Images courtesy of İGA, igairport.com

airport Hartsfield-Jackson Atlanta International, which served 104 million in 2017.

Istanbul's new airport will employ about 225,000 people directly and indirectly by 2025; an Istanbul Airport Economic Impact Report prepared in 2016 suggests that the economic value created by airport-related activities in 2025 will correspond to 4.89 percent of the GNP. The new airport complex, launched in 2013, is built to compete with Dubai and Abu Dhabi as major East-West linking points, much as Istanbul has done for many centuries. Even before the opening of the new Istanbul Airport, its predecessor, Istanbul Atatürk Airport, served nearly 64 million passengers in 2017 and more than 270 non-stop destinations. The new airport will serve more than 300 destinations.

The new airport features:

- A 90-meter (295-foot) tall control tower;
- six runways, the longest of which is 4,100 meters (13,500 feet or 2.5 miles);
- 1.4 million square meters (1.6 million square yards) of main terminal and cargo area each;
- access to central Istanbul via Metro transport and highways; and
- eventually, an Airport City.

"Istanbul Airport City will constitute a modern living space where airport passengers can meet their accommodation, shopping, social and cultural needs," according to airport developer and operator İGA. "Istanbul Airport City will feature hotels, shopping centers, office space, private residences, worship areas, educational facilities, culture and arts centers, hospitals and a trade show area." ▼

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Fraport, Volocopter Plan Infrastructure for Air Taxi Services



Image courtesy of Fraport AG

Airport operator Fraport AG and Volocopter GmbH are developing concepts for ground infrastructure and operations required for air taxi services at airports. This cooperation focuses on smooth passenger handling and efficient integration into existing transport infrastructure. In the future, so-called Volocopter Ports could link existing urban transportation junctions with one another and provide connections to and from Frankfurt Airport (FRA).

Fraport, a globally active airport manager with many years of expertise in airport operations — particularly in ground infrastructure, ground handling, and terminal and passenger services, can leverage its experience in unmanned flying. Via its FraDrones program, Fraport has already tested various scenarios for using drones for operational purposes.

Volocopter has already proven that its electrically powered vertical take-off multicopters meet the requirements of Urban Aerial Mobility in various test flights, most notably in Dubai. Based on drone technology, the Volocopter offers space for two people and is a suitable urban transport solution thanks to its quiet and zero-emissions flying.

Frankfurt Airport, Germany's most important aviation hub with more than 69 million passengers last year, offers the ideal conditions for this innovative partnership.

"Autonomous flying will fundamentally change aviation in the years to come," says Anke Giesen, Fraport AG's executive board member for operations (COO). "We want to be the first airport in Europe to harness the potential of electric air taxis in partnership with pioneer Volocopter — for the benefit of our passengers and the Frankfurt/Rhine-Main region. This partnership underscores Fraport AG's role as a key driver of innovation in diverse fields."

Adds Florian Reuter, CEO of Volocopter GmbH: "Providing the ideal connection between the city center and the airport poses a huge challenge for the world's major cities. Together with Fraport AG, we are excited to pioneer the implementation of an air taxi service at one of Europe's most important airports. We will be tapping into Fraport's wealth of experience to integrate the Volocopter Service safely and efficiently into the complex array of processes required at a major international airport."



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How Can Small Hubs Leverage Their Unique Advantages?

Landside development has become an essential part of the airport business model. Often, these projects are branded as “airport cities”: large-scale commercial and industrial zones that are designed to meet the needs of mega-hubs serving upwards of 50 million passengers a year. These global hubs are at the forefront of innovation, and the decisions that they make set the agenda for every aspect of the airport industry — including landside real estate.

But guess what? Most airports aren’t mega-hubs. In fact, there are only about 30 of them around the world. And when it comes to landside development, most airports have neither the same challenges, nor the same opportunities, that mega-hubs do. Nevertheless, many smaller airports look to these global hubs for guidance, and try to implement a scaled-down version of their airport city plans — often with disappointing results.

Small hubs — that is, airports with less than 10 million annual passengers — constitute the majority of airports worldwide. They enjoy several distinct advantages compared to their much larger cousins. Instead of trying to copy airport city plans made for mega-hubs, how can these rising stars come up with landside growth strategies that leverage their own unique assets?

Let’s start by looking at the four advantages that set small hubs apart.

Location, location, location. Many global hubs have been built since the 1970s in places that are far from the urban core. Their airport city projects struggle to attract businesses to what is essentially a rural site. By contrast, small hubs are often located on older airfields near the CBD. Over time, the city has grown around them, making landside real estate more valuable. While it might take you an hour to reach a big hub from the city center, many small hubs are just a quick drive from downtown. That’s a huge locational advantage. Successful small hubs can leverage

that proximity to develop non-aeronautical activities that cater to local residents and local industries.

A supportive community. Mega-hubs are often in the spotlight of intense national debates. With planning areas that cut across multiple jurisdictions, their expansion goals suffer from chronic setbacks due to the sheer number of stakeholders involved, and due to the complexity of their conflicting interests. By contrast, small hubs benefit from the close-knit relationships that are typical of smaller cities and smaller business communities. They recognize the importance of aerial connectivity for the local economy, and they want their airport to succeed. This creates a mindset that focuses on bringing in investment through cooperation. One example: expedited

by MAX HIRSH

editor@siteselection.com



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DELTA AIRLINES OPENS JET ENGINE TESTING FACILITY



Photo courtesy of Delta Airlines

Delta Airlines has completed construction on the world's largest jet engine test cell at its home base, Hartsfield-Jackson Atlanta International Airport, the anchor of **Aerotropolis Atlanta**. Standing 48 feet tall, with inlet and exhaust sections measuring 66 feet and 78 feet respectively, the test cell is capable of safely running a mounted, stationary engine at full power with 150,000 pounds of thrust. To compare, the airline's current test cell has a 68,000-pound thrust capacity.

The test cell will provide capabilities to test a new assortment of engines that will advance Delta into the future, according to the airline. With its 150,000-pound thrust capacity,

the cell will open the door to many new, larger engine testing capabilities, including the Trent 1000, 7000 and XWB and the PW1100 and PW1500 variants of the Geared Turbofan.

The ability to test larger engines reinforces Delta's commitment to offering repair capabilities for newer engine models and helps facilitate future demand. Delta hosted a grand opening of the facility in February. Next steps include the proving and data validation for the cell, the commissioning of the cell with the Trent XWB engine, Trent 1000 Electric Start System installation, the Trent 1000 commissioning, correlation and production test, with the first production test taking place in late 2019.

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permitting. At large hubs, it can take years — plural — to obtain all the permits that are needed to develop and build a landside project. Smaller hubs are often able to get the paperwork done in less than a month. That's because they work hard to create a flexible and proactive culture: where the airport, the city, and economic development agencies work together for mutual benefit.

Focus on local industries.

At small hubs, the local economy tends to be dominated by a discrete number of industries, with only a handful of dynamic start-ups and large employers. Talking to them about their current needs and future goals can very quickly lead to concrete plans. A focused business development effort, driven by a team that is highly knowledgeable about one or two target industries, makes potential clients “feel the love” in a way that mega-hubs find difficult to match. Small hubs not only offer clients more face-time, but also a more flexible approach to landside development. For example, Edmonton airport recently partnered with a local cannabis manufacturer to help develop one of the region's fastest growing industries. Together, they built a 100,000-square-meter production and distribution center, which will double in the coming years. For the airport, that's translated into nearly \$400 million in investments from a single firm.

A distinct profile. Small hubs often have a very specific user profile. While large



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airports struggle to accommodate a wide range of people and products, smaller ones have a pretty good sense of who their customers are, and what types of facilities will appeal to them. Some small hubs, like Brussels Charleroi, serve the low-cost market; while others, such as London City, cater to business travelers. Warm-weather destinations like Palm Springs host tourists and retirees. Leipzig and Luxembourg don't welcome a lot of passengers, but they punch above their weight when it comes to cargo. Other small hubs, like Canberra and Regina, operate as gateways for government workers, or for professionals in the oil, gas and mining industries. These distinct profiles can be a real advantage when it comes to creating people-focused strategies that are tailored to the unique needs and desires of specific kinds of customers.

To recap, the main advantages of small hubs are proximity to the city, the ability to implement projects more quickly, and a closer relationship

with customers, clients, and decision-makers.

Now for the bad news. The most obvious disadvantage is that small hubs simply have far fewer passengers and employees than mega-hubs, which translates into lower demand for things like hotels and F&B. And unless your airport happens to be located in a place where a lot of high-value or time-sensitive goods are being made, it's unlikely that there will be much demand for just-in-time cargo facilities.

Aware of these crucial differences, successful small hubs don't just copy what the mega-hubs do. Instead, they propose innovative landside strategies that leverage their unique advantages. Compared to larger airports, small hubs are much more dependent on local customers — people who aren't actually flying — in order to drive successful developments around the airport. These rising stars therefore need to be much more attuned to the specific needs of local residents, local industries, and local business owners. ▼



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About the Author

Max Hirsh (PhD, Harvard) is a Professor at the University of Hong Kong and a leading expert on airports and urban development. His research focuses on non-aeronautical revenue, landside real estate, and airport-area growth strategies. Max is the developer of Airport Urbanism, a new, people-focused approach to airport design. This article first appeared on February 25th, 2019, on airporturbanism.com

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by MARK AREND
mark.arend@siteselection.com

THE GOVERNORS OF NEBRASKA AND TEXAS
HAVE A FEW THINGS IN COMMON — NEW
TERMS IN OFFICE, A COMMITMENT TO PUTTING
VETERANS TO WORK AND ANOTHER GOVERNOR'S
CUP TO ADD TO THEIR COLLECTIONS.



MAKING IT LOOK EASY

This we know for sure: Texas and Nebraska are consistent. Texas Governor Greg Abbott wins a fifth consecutive Governor's Cup — his state's seventh consecutive win — for total qualified projects in 2018. And Nebraska Governor Pete Ricketts wins a third consecutive Governor's Cup for total projects per capita — his state's fourth such prize. Both governors won their reelection bids in late 2018, but it was the capital investors voting with project location choices that have them defending their titles for yet another year. Even their project totals resemble last year's performance: Texas finishes with 608 projects, up from 594 in 2017; Nebraska landed 118 in 2018, up from 110 the previous year.

Qualified projects are those meeting one or more of Site Selection's criteria for inclusion in the Conway Projects Database: a minimum investment of \$1 million, creation of 20 or more new jobs or 20,000 square feet or more of new space.

Speaking of consistency, Ohio is once again the runner-up on the total projects side, again passing the 450 projects mark, with 454, as it has done in recent years. The Buckeye State fell just one spot to third place on the per capita side, ceding second place to Kentucky and its 226 projects in 2018. Rounding out the top five nationally in each category: Third-, fourth- and fifth-place states for total projects are Illinois (444), Georgia (300) and Kentucky (226). Following Kentucky and Ohio for per capita projects are Illinois and Iowa (109).

With year-over-year wins to their credit, both Governors Ricketts and Abbott are quick to share credit for this recognition with their economic development teams in Lincoln and Austin. Just as important, they note, are the many business recruitment foot soldiers and field commanders in the large and small metros across their states — in Omaha, Scotts Bluff and Hastings; Dallas-Fort Worth, Amarillo and Round Rock, among dozens of other locations in each state.



NEBRASKA'S PILLARS OF PROSPERITY



Governor Ricketts, in September 2018, launched a statewide Governor's Cup thank you tour around Nebraska, to acknowledge those very contributors to the Cornhusker State's success. In one week, Gov. Ricketts and state economic developers visited Fremont, Blair, South Sioux City, Lincoln, Grand Island and Holdrege to thank the businesses in those communities that helped earn another Governor's Cup. Another is planned for some time later this year. In the meantime, Governor Ricketts tells Site Selection, the plan is to keep doing what's working, which is a four-part plan that has served him well as head of the executive branch.

"The first pillar is making sure that we are developing our people and connecting them to great-paying jobs," he explains. "The second is running government more like a business, to make it more effective, more efficient and more customer-focused and to cut the red tape that gets in the way of job creation, to get those obstacles out of the way. The third is to make sure we are good stewards of taxpayer dollars — managing our costs and by doing that, providing tax relief. The fourth is to go

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out and promote Nebraska domestically and internationally, telling the world what a great place we have here and opening up markets for our producers and our companies and to seek investment back here in our state.”

Those principles are paying off, the governor says, with Nebraska winning accolades from business publications in addition to Site Selection and other state-ranking entities for fiscal stability, low costs for businesses, favorable regulatory environment, workforce participation rate and wage growth. “We’ve created an environment that is conducive for people to invest and to know they can grow their company,” he says. “In this legislative session, we are continuing to reinforce those pillars, and we are expanding what we’re doing with regard to getting seventh and eighth graders involved in manufacturing and IT and building that pipeline from there through high school to post-secondary education. Regarding the latter, we’re expanding our scholarships around key areas like industrial technology, computer information systems, looking at what



In July 2018, Governor Pete Ricketts and Governor Toshizo Ido of Japan's Hyogo Prefecture signed a memorandum of understanding (MOU) strengthening the economic ties between Nebraska and Hyogo.

Image courtesy Office of the Governor

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Evan Williams, CEO and president of Franklin International

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Mike Youngblood, COO of McLane Company

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Congratulations to all of the local partners for the dedication and collaborative spirit they bring to their communities and the Ohio team, especially those who were recognized with Governor's Cup rankings. The teamwork across the state resulted in the No. 2 ranking for Ohio again in the 2018 Governor's Cup.



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we can do with health care and engineering and math, but tailored for the institutions.”

Another focus is to streamline organizationally, perhaps by combining some agencies in order to better serve users.

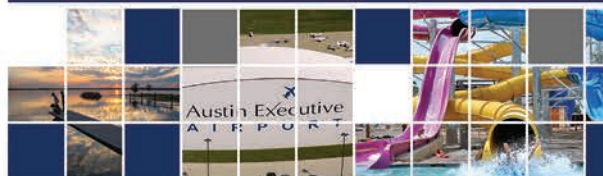
“The budget I proposed this year is only growing at 3.1 percent, and my agency operations are only growing at 2.3 percent,” says the governor. “Part of what we’re doing is taking the money where we’re controlling our spending and putting it into tax relief, increasing our property tax credit refund, for example, by 23 percent. And we’re proposing expanded tax cuts for military retirement benefits. We’re trying to be more competitive with regard to keeping our veterans in our state.”

Property Tax & Incentive Reform

Does the property tax issue Governor Ricketts has been tackling in recent years spill over to the corporate property arena? It does, he says, particularly with respect to commercial real estate.

“Last year we had a bill that got filibustered in our legislature — it was going to be a refundable

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2018 REGIONAL PROJECT RANKINGS

TOTAL PROJECTS

MOUNTAIN

2018	2017	STATE	PROJECTS
1	1	Arizona	68
2	3	Nevada	65
3	2	Colorado	27
4	5	New Mexico	20
5	4	Utah	12
6	T6	Idaho	9
7	T6	Wyoming	8
8	8	Montana	3
REGION TOTAL			212

EAST NORTH CENTRAL

2018	2017	STATE	PROJECTS
1	1	Ohio	454
2	2	Illinois	444
3	4	Michigan	171
4	3	Indiana	144
5	5	Wisconsin	72
REGION TOTAL			1,285

NORTHEAST

2018	2017	STATE	PROJECTS
1	1	Pennsylvania	149
2	2	New York	126
T3	4	Massachusetts	36
T3	3	New Jersey	36
5	5	Connecticut	24
T6	6	Maine	11
T6	8	New Hampshire	11
8	7	Rhode Island	6
9	9	Vermont	4
REGION TOTAL			403

PACIFIC

2018	2017	STATE	PROJECTS
1	1	California	190
2	2	Oregon	19
3	3	Washington	16
4	5	Hawaii	2
5	4	Alaska	1
REGION TOTAL			228

WEST NORTH CENTRAL

2018	2017	STATE	PROJECTS
1	1	Missouri	125
2	2	Nebraska	118
3	3	Iowa	109
4	5	Minnesota	66
5	4	Kansas	32
6	6	South Dakota	13
7	7	North Dakota	10
REGION TOTAL			473

SOUTH ATLANTIC

2018	2017	STATE	PROJECTS
1	1	Georgia	300
2	2	North Carolina	217
3	3	Virginia	197
4	4	Florida	151
5	5	South Carolina	105
6	6	Maryland	35
7	9	Delaware	11
8	7	West Virginia	5
9	8	Washington D.C.	1
REGION TOTAL			1,022

SOUTH CENTRAL

2018	2017	STATE	PROJECTS
1	1	Texas	608
2	2	Kentucky	228
3	3	Tennessee	132
4	5	Alabama	99
5	4	Louisiana	75
6	7	Oklahoma	39
7	8	Mississippi	38
8	6	Arkansas	37
REGION TOTAL			1,256

2018 REGIONAL PROJECT RANKINGS

PER CAPITA

PACIFIC

2018	2017	STATE	PROJECTS	PER MILLION
1	1	California	190	4.8
2	2	Oregon	19	4.5
3	4	Washington	16	2.1
4	5	Hawaii	2	1.4
5	3	Alaska	1	1.3
REGION AVERAGE			2.8	

WEST NORTH CENTRAL

2018	2017	STATE	PROJECTS	PER MILLION
1	1	Nebraska	118	61.2
2	2	Iowa	109	34.5
3	4	Missouri	125	20.4
4	6	South Dakota	13	14.7
5	5	North Dakota	10	13.2
6	7	Minnesota	66	11.8
7	3	Kansas	32	11.0
REGION AVERAGE			23.8	

SOUTH ATLANTIC

2018	2017	STATE	PROJECTS	PER MILLION
1	1	Georgia	300	28.5
2	4	Virginia	197	23.1
3	2	North Carolina	217	21.0
4	3	South Carolina	105	20.7
5	9	Delaware	11	11.4
6	8	Florida	151	7.1
7	7	Maryland	35	5.8
8	6	West Virginia	5	2.8
9	5	Washington D.C.	1	1.5
REGION AVERAGE			13.5	

SOUTH CENTRAL

2018	2017	STATE	PROJECTS	PER MILLION
1	1	Kentucky	228	51.0
2	3	Texas	608	21.2
3	5	Alabama	99	20.3
4	4	Tennessee	132	19.5
5	2	Louisiana	75	16.1
6	8	Mississippi	38	12.7
7	6	Arkansas	37	12.3
8	7	Oklahoma	39	9.9
REGION AVERAGE			20.4	

MOUNTAIN


2018	2017	STATE	PROJECTS	PER MILLION
1	1	Nevada	65	21.4
2	2	Wyoming	8	13.8
3	6	New Mexico	20	9.5
4	3	Arizona	68	9.5
5	8	Idaho	9	5.1
6	4	Colorado	27	4.7
7	5	Utah	12	3.8
8	7	Montana	3	2.8
REGION AVERAGE			8.8	

EAST NORTH CENTRAL

2018	2017	STATE	PROJECTS	PER MILLION
1	1	Ohio	454	38.8
2	2	Illinois	444	34.8
3	3	Indiana	144	21.5
4	5	Michigan	171	17.1
5	4	Wisconsin	72	12.4
REGION AVERAGE			24.9	

NORTHEAST

2018	2017	STATE	PROJECTS	PER MILLION
1	1	Pennsylvania	149	11.6
2	2	Maine	11	8.2
3	9	New Hampshire	11	8.1
4	6	Connecticut	24	6.7
5	T3	New York	126	6.4
6	8	Vermont	4	6.4
7	T3	Rhode Island	6	5.7
8	5	Massachusetts	36	5.2
9	7	New Jersey	36	4.0
REGION AVERAGE			6.9	



We're proposing expanded tax cuts for military retirement benefits. We're trying to be more competitive with regard to keeping our veterans in our state."

— Nebraska Governor Pete Ricketts

Image courtesy Office of the Governor

tax credit based on property taxes," he explains. "it was important to the business community that it wasn't just for agriculture or residential, but that it also included commercial properties. That bill also had reducing our corporate income tax down to the level of our individual income tax in it. This year, one of the things we have to get done is revamping our Nebraska Advantage incentive system — not that I wouldn't take the opportunity to try to reduce our income tax, but we're really focusing on our incentives system to make it simpler, more transparent, easier to use and focused more on higher-wage jobs."

Something the governor hears from the business community is that the incentives system isn't as easy to use as it could be, he says. It works on a per project basis, for instance, rather than

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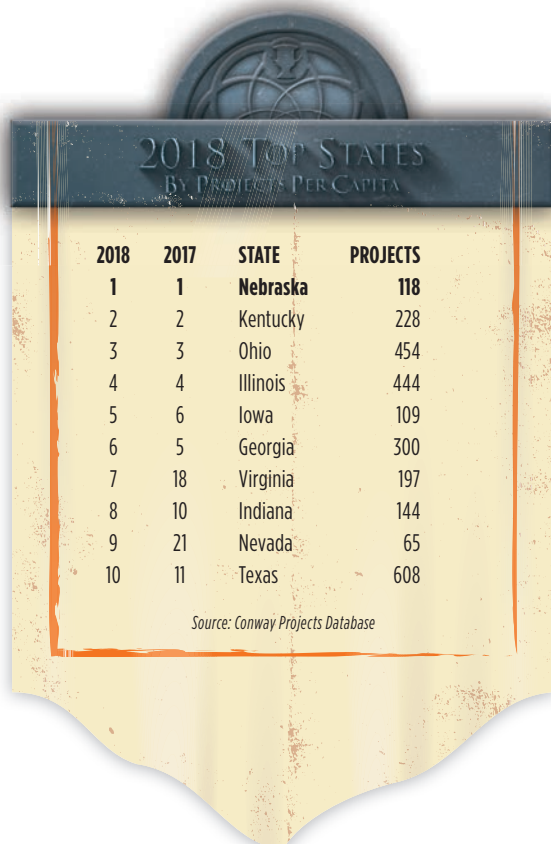


Interstate 10, Quincy, Florida



Governor Pete Ricketts hosted a ceremonial bill signing event in June 2018 for LB 989, which paves the way for the use of autonomous vehicles (AV) in Nebraska.

Image courtesy Office of the Governor



on a per location basis. “That will help simplify the process — we want to make it easier on businesses and frankly easier on our revenue department to be able to manage it.

“The other aspect is focusing on higher-wage jobs,” says the governor. “That means targeting the areas that are going to help us. We have a limited amount of incentives, so we want to focus on the jobs that will pay higher wages and incent them to come to our state.”

Other measures include cultivating apprenticeship programs at companies and, as Governor Ricketts noted in his State of the State address, “recommending the creation of the Nebraska Talent Scholarships program to help our community colleges, state colleges, and the university system attract even more students in targeted programs from engineering to health care with over 2,100 new scholarships. Additionally,” he added, “I am recommending the expansion of the Developing Youth Talent Initiative to connect more middle school students to opportunities in manufacturing and IT with an additional \$1.25 million annually. This program has already impacted 7,000 students, and this expansion will help reach even more. Working together to create more pathways, we can help connect more Nebraskans with the countless great opportunities available in communities statewide.”

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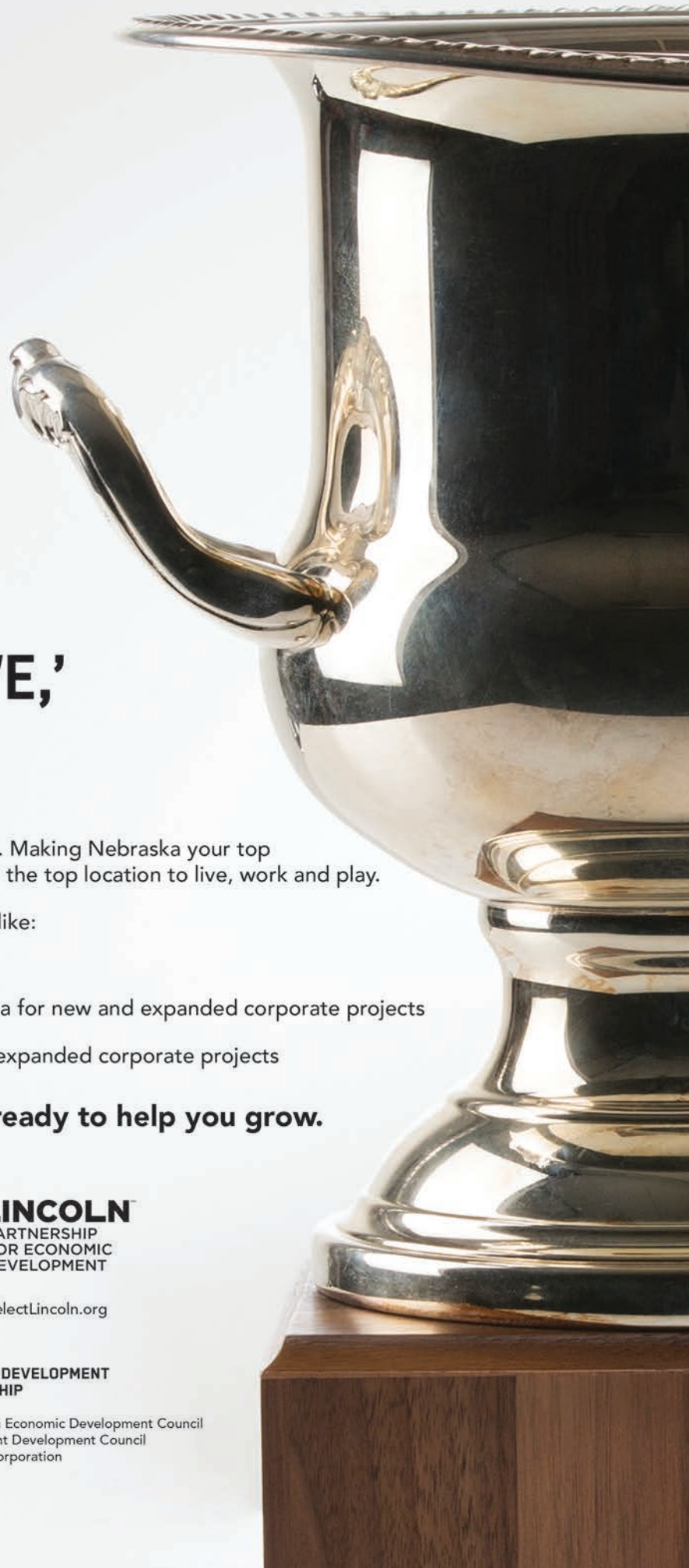
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BIG OR SMALL ALL TEXAS PROJECTS MATTER



“In Texas, we continue to benefit from teamwork,” Governor Greg Abbott tells Site Selection. “This is not driven by the state alone. We have the very best local economic development teams in both urban and rural parts of the state. We have worked on expanding what we are doing in economic development beyond the cities and are focusing a lot on the rural areas. There have been a number of projects in smaller towns across Texas. We are working to spread the wealth to all regions of the state to make sure that all regions are benefiting in our economic development growth.”

Not to exclude any region, but by way of example, Abbott points to “a lot of activity in East Texas — in Mount Pleasant and Paris, in Lufkin and Temple — places people outside Texas wouldn’t be very familiar with. They’re communities of 100,000 people or less.” Just as with the enormous projects, like Apple’s \$1-billion expansion in Austin and McKesson’s headquarters relocation to Irving, he notes, “the smaller projects in the smaller towns are just as important to them as the large projects are to our big cities.”

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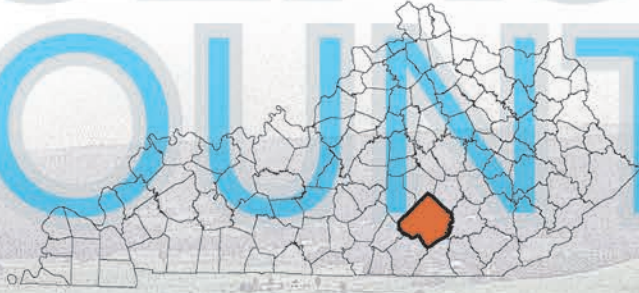
In December 2018, Apple announced plans to build a new, \$1-billion campus in Austin.
Image courtesy Office of the Governor



In December 2018, Apple announced a major expansion of its operations in Austin, including an investment of \$1 billion to build a new campus in North Austin as well as new sites in Seattle, San Diego and Culver City and expansions in several other cities across the United States. Apple's newest Austin campus will be located less than a mile from its existing facilities. The 133-acre (54-hectare) campus will initially accommodate 5,000 additional employees, with the capacity to grow to 15,000, and is expected to make Apple the largest private employer in Austin.

"Apple is among the world's most innovative companies and an avid creator of jobs in Texas and across the country," said Texas Governor Greg Abbott at the expansion announcement. "Their decision to expand operations in our state is a testament to the high-quality workforce and unmatched economic environment that Texas offers. I thank Apple for this tremendous investment in Texas, and I look forward to building upon our strong partnership to create an even brighter future for the Lone Star State." Jobs created at the new campus will include a broad range of functions including engineering, R&D, operations, finance, sales and customer support. At 6,200 people, Austin already represents the largest population of Apple employees outside Cupertino.

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2018 GLOBAL GIANTS

TOP PROJECTS BY CAPITAL INVESTMENT

COMPANY	LOCATION	COUNTRY	PRODUCT	NEW/EXPANSION	\$US MILLIONS
Abu Dhabi National Oil Co.	Ruwais, Abu Dhabi	UAE	Petroleum	N	45,000
Ratnagiri Natural Gas/ Saudi Arabian Oil Co.	Ratnagiri, Maharashtra	India	Petroleum	N	44,000
SK Hynix	Icheon-si, Gyeonggi-do	South Korea	Semiconductors	N	13,000
Toshiba Memory Corp	Kitakami, Iwate-ken	Japan	Semiconductors	N	9,000
BOE Technology Group Co.	Chongqing, Chongqing	China	Semiconductors	N	6,973
State Oil Company Of The Azerbaijan Republic	Aliaga, Izmir	Turkey	Petroleum	N	6,000
Samsung Electronics Co.	Hwaseong-si, Gyeonggi-do	South Korea	Semiconductors	N	5,637
Long Son Petrochemicals Co.	Vung Tau, Tinh Ba Ria-Vung Tau	Vietnam	Petroleum	N	5,400
Thrust Aircraft	Palghar, Maharashtra	India	Aircraft	N	5,261
Gascana AB Energy	Sturgeon, Alb.	Canada	Petroleum	N	4,000
Metcap Energy Investments/ Fusion Dynamics	Enez, Edirne	Turkey	Petrochemicals	N	4,000

TOP PROJECTS BY SIZE

COMPANY	LOCATION	COUNTRY	PRODUCT	NEW/EXPANSION	SQ. FT. X 1,000
LG Electronics	Seoul, Seoul	South Korea	Wireless Comm Equip	N	11,900
Chi Mei Materials Technology Corp.	Xi'an, Shaanxi	China	Semiconductors	N	9,580
Tencent Holdings	Guian, Guizhou	China	Data Processing	N	5,522
General Motors	Sao Caetano do Sul, Sao Paulo	Brazil	Automobiles	E	4,650
ABB	Xiamen, Fujian	China	Electrical Equipment	N	4,575
Aircraft Recycling International	Harbin, Heilongjiang	China	Aircraft	N	3,229
Mondelez International	Manama, Capital Governorate	Bahrain	Food	N	2,691
Facebook	Esbjerg, Region Syddanmark	Denmark	Data Processing	N	2,691
China Automotive Engineering Research Institute Co.	Chongqing, Chongqing	China	Automobiles	E	2,300
Bühler AG	Changzhou, Jiangsu	China	Machinery	N	2,153

TOP PROJECTS BY JOBS CREATED

COMPANY	LOCATION	COUNTRY	PRODUCT	NEW/EXPANSION	EMPLOYEES
Qualcomm	Hyderabad, Telangana	India	Semiconductors	N	10,000
Anadarko Petroleum Corp.	Cabo Delgado Province	Mozambique	Petroleum	N	5,000
Vivo Communication Techn Co.	Delhi, Nat'l Capital Territory of Delhi	India	Wireless Comm Equip	E	5,000
HCL Technologies	Vijayawada, Andhra Pradesh	India	Computer Programming	N	4,000
Haier Appliances (India)	Greater Noida, Uttar Pradesh	India	Household Appliances	N	3,950
HCL Technologies	Amaravati, Andhra Pradesh	India	Computer Programming	N	3,500
Plexus Corp.	Guadalajara, Jalisco	Mexico	Circuit Boards	N	3,000
Amazon	Vancouver, B.C.	Canada	Retail Merchandise	N	3,000
Nissan Motor Co.	Thiruvananthapuram, Kerala	India	Automobiles	N	3,000
Wuxi No.1 Cotton Textile Factory	Dire Dawa, Dire Dawa Region	Ethiopia	Textiles	N	3,000
Herberton	Tinh Nam Dinh	Vietnam	Textiles	N	3,000

Source: Conway Projects Database

Bimini Basin:

Prime Redevelopment Project in Cape Coral



Ranked among the fastest-growing cities in the nation, Cape Coral is a hotspot for prime development opportunities. One of the best public-private investment opportunities for 2019 is Bimini Basin, a waterfront redevelopment project in the heart of South Cape.

The City of Cape Coral has partnered with RMA Real Estate Services to find the right developer for this mixed-use project that will create office space, arts, entertainment and dining venues, and housing in a strategic downtown location.

The proposed project will be a largescale development of up to 35 acres on Bimini Basin, which provides direct access to the Gulf of Mexico. It is located south of Cape Coral Parkway in the historic entertainment and business district. The basin is lined with homes and condos with private docks and spectacular sunset vistas.

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“Employers really do like hiring veterans, because they come with batteries included — they’re well trained and focused and they understand how to take instructions. It’s a matter of taking some of those who have committed their lives to our country and helping them to commit their future to a company.”

— Texas Governor Greg Abbott, on a veterans provision being added to his state’s deal closing fund

In November 2018, McKesson Corporation announced the relocation of its corporate headquarters from San Francisco to Las Colinas, Texas, effective April 1, 2019, expanding upon its presence in the Dallas area.

“We are excited to strengthen our presence in Texas and make Las Colinas our official global headquarters,” said John H. Hammergren, chairman and chief executive officer. “Governor Abbott and the Irving/Las Colinas community have provided tremendous support since we opened our Las Colinas campus last April. Making this move will improve efficiency, collaboration and cost-competitiveness, while providing an exceptional work environment for our employees.”

McKesson’s Las Colinas campus is already a key hub for the company. Employees at the North Texas location perform vital functions for the company in areas such as operations, information technology, finance and accounting, marketing and sales, administration and support, purchasing, and project management.

“I’m delighted McKesson, a Fortune 6 company, is making Texas the home of its new global headquarters,” said Governor Abbott. “The company has a long record of success in our state. McKesson’s expansion is an example of the kind of high-quality companies and jobs Texas has attracted as a result of our focus on economic growth, and I am proud to welcome them to the Lone Star State.”

Lawmakers Tackle Emergency Items

The Texas Legislature is in session, and “we’re off to a great start,” says the governor. “As great as Texas may be for business, if we succeed in everything that I’ve just made an emergency item, Texas will be far better. For example, our big push that we’re focused on already is a reduction in property taxes. Texas is a low tax state — no income tax. But property taxes are a burden. Our goal is to curtail that through property tax reform, because that’s good for businesses as well as for homeowners.

“Our other big push is on school finance reform and investing more in education, which will be very beneficial in advancing the workforce of the future. That includes more investment in higher education. That means the traditional four-year university program as well as two-year programs to make sure we’re providing the skilled workforce that our employers are demanding. We are keenly attuned to what the demands and needs are from our business partners in Texas and it’s a collaborative effort to make sure we will be the workforce that will fulfill their needs.”

The Lone Star State’s Texas Enterprise Fund (TEF) — a deal-closing fund — is a key factor in the state’s business recruitment strategy, and it now has a new feature. In June 2018, Governor Abbott announced an additional incentive program for new Texas Enterprise Fund (TEF) grantees designed to encourage the hiring of military veterans. New grantees, in addition to being eligible for funding on a per job created basis, will be eligible for an additional \$1,000 per job filled by a veteran during the first year of job creation.

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2018 U.S. GIANTS

TOP PROJECTS BY CAPITAL INVESTMENT

COMPANY	CITY	STATE	PRODUCT	NEW/EXPANSION	\$US MILLIONS
Micron Technology	Manassas	Va.	Semiconductors	E	3,000
Amazon	Arlington	Va.	Retail Merchandise	N	2,500
Amazon	Borough of Queens	N.Y.	Retail Merchandise	N	2,500
Enable Midstream Partners	Houston	Texas	Petroleum	E	2,200
Covestro AG	Baytown	Texas	Paint and Coating	N	1,720
Bayport Polymers	Port Arthur	Texas	Petrochemical	N	1,700
Mazda Toyota Manufacturing USA	Huntsville	Ala.	Automobiles	N	1,600
Big River Steel	Brownsville	Texas	Steel Mills	N	1,600
Fedex	Indianapolis	Ind.	Couriers	E	1,500
Mount Elbert Edgecore Services	Mesa	Ariz.	Data Processing	N	1,200
Big River Steel	Osceola	Ark.	Rolled Steel Shape	E	1,200

TOP PROJECTS BY SIZE

COMPANY	CITY	STATE	PRODUCT	NEW/EXPANSION	SQ. FT. X 1,000
Archer-Daniels-Midland	Effingham	Ill.	Animal Food	E	5,000
Abbyson Living Corp.	Las Vegas	Nev.	Lumber	N	5,000
Mazda Toyota Manufacturing USA	Huntsville	Ala.	Automobiles	N	3,000
Amazon	Garner	N.C.	Retail Merchandise	N	2,600
Amazon	Charlotte	N.C.	Retail Merchandise	N	2,500
JPMorgan Chase	New York City	N.Y.	Commercial Banking	N	2,500
Harbor Freight Tools USA	Joliet	Ill.	Hardware	N	2,100
QTS Realty Trust	Phoenix	Ariz.	Data Processing	N	2,000
Amazon	Oak Creek	Wis.	Retail Merchandise	N	2,000
World Wide Technology	Edwardsville	Ill.	Computer Equipment	N	2,000

TOP PROJECTS BY JOBS CREATED

COMPANY	CITY	STATE	PRODUCT	NEW/EXPANSION	EMPLOYEES
Amazon	Arlington	Va.	Retail Merchandise	N	25,000
Amazon	Borough of Queens	N.Y.	Retail Merchandise	N	25,000
Amazon	Nashville	Tenn.	Retail Merchandise	N	5,000
Apple	Austin	Texas	Wireless Comm Equip	N	5,000
Mazda Toyota Manufacturing USA	Huntsville	Ala.	Automobiles	N	4,000
Allstate Insurance	Chandler	Ariz.	Insurance	N	2,530
Deloitte Consulting	Gilbert	Ariz.	GM Consulting Services	N	2,500
Fiat Chrysler Automobiles	Warren	Mich.	Automobiles	E	2,500
Nokia	Dallas	Texas	Computer Programming	E	2,300
Nikola Motor Co.	Coolidge	Ariz.	Automobiles	N	2,000
Raytheon Missile Systems Co.	Tucson	Ariz.	Guided Missile and Space Vehicles	E	2,000
Huntington Ingalls Industries	Newport News	Va.	Ship Building and Repairing	E	2,000

Source: Conway Projects Database



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- Preliminary 2018 data, Energy Information Administration

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“Texas has one of the largest veteran populations of any state, and it is imperative that we ensure those returning from service continue to have opportunities to work and provide for their families,” said Governor Abbott. “Veterans bring unmatched leadership abilities and they already possess many of the technical skills employers are looking for. I’m proud of our state’s support for Texas veterans, and it’s my hope that future companies will take advantage of this program.”

Qualifying positions must be filled by a person who has served in the United States Army, Navy, Marine Corps, Air Force, or Coast Guard, the National or Air National Guard of the United States, the Texas Army National Guard, Texas Air National Guard, or served in a Reserve component of any of the aforementioned military organizations, and has been honorably discharged from the branch of the service in which the person served.

Last year, Governor Abbott unveiled a comprehensive plan to address the underemployment of Texas veterans, and committed to using all available resources to get the state’s veterans back to work after returning from service. “We find across the board that employers really do like hiring veterans, because they come with batteries included — they’re well trained and focused and they understand how to take instructions and follow orders,” the governor tells Site

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Selection. “It’s a matter of taking some of those who have committed their lives to our country and helping them to commit their future to a company.” Since its inception in 2004, the TEF has awarded about 160 grants totaling more than \$615 million across a wide variety of industries and projects committed to creating almost 94,000 jobs and investing more than \$27 billion in the state of Texas.

Governor Abbott also weighed in on trade agreements affecting his state, most notably the United States-Mexico-Canada Agreement. “I urge the Texas delegation to vote to pass it,” he relates. “The USMCA is great for Texas, which is the number one exporter in the country, and our number one trade partner is Mexico. Second is Canada. The USMCA is very important to the future of the Texas economy and to the future of the American economy. It is essential that Congress adopt and vote in favor of the USMCA.”

Now into his second term, Governor Abbott looks to the future. “We continue to excel in building out our infrastructure. We are continuing to add a little more than \$7.5 billion a year to building out road infrastructure and making sure that Texas will provide for the infrastructure needs of our growing companies. And I can not emphasize enough our keen focus on developing the workforce that our employers are demanding.” ▼

“We are keenly attuned to what the demands and needs are from our business partners in Texas.”

— Texas Governor Greg Abbott



Image courtesy Office of the Governor

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GREAT THINGS HAPPEN HERE

HQ2 OR NOT

The Top Metros in that nation know how to bring in the projects, and crave the talent to keep that pipeline flowing.

by ADAM BRUNS

adam.bruns@siteselection.com

If you're shooting for the biggest economic development prize of modern times, it helps to have the former U.S. Secretary of Commerce leading the charge.

That's what happened in Chicago, when Penny Pritzker, who filled that post for the Obama administration until January 2017, was front and center as World Business Chicago, Mayor Rahm Emanuel and every business leader and organization in town worked to attract Amazon's HQ2.



Former U.S. Commerce Secretary Penny Pritzker now is helping lead a new Chicago tech-economy organization called P33.

"Look," she says in an interview, "Chicago has so many assets it is a natural. Who knows what went into the final decision. What I know is that Chicago was for sure on the serious short list, because

of so many things — tech talent, transportation hub, universities, national labs, a can-do attitude."

Pritzker led the private-sector effort as part of the mayor's team of some 600 leaders from all segments of professional and community life.

"I helped show them around in a small team," she says of Amazon's visits. "They liked our sites that we offered. I thought we showed them what a phenomenal opportunity it was."

Chicago didn't make the cut. But after Amazon's dramatic HQ2 pullout of the planned 25,000 jobs in New York on Valentine's Day, who knows what could happen next for the Second City?

"It will be interesting to see what's happened," Pritzker said on the day the Amazon pullout was announced. "Hopefully they'd reconsider us."

Return to Tech Glory

Maybe one reason Amazon didn't come to Chicago was that so many other companies already have.

Greater Chicago once again has finished No. 1 in the nation in Site Selection's annual Top Metros rankings, based on qualified corporate facility investment projects during the previous



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2018 TOP METROS PROJECT RANKINGS

METROS WITH POPULATION OVER 1 MILLION

2018	2017	METRO	STATE	PROJECTS
1	1	Chicago-Naperville-Elgin	Ill.-Ind.-Wis.	422
2	3	Dallas-Fort Worth-Arlington	Texas	207
3	4	Atlanta-Sandy Springs-Roswell	Ga.	166
4	2	Houston-The Woodlands-Sugar Land	Texas	165
5	6	Cincinnati	Ohio-Ky.-Ind.	103
6	5	New York-Newark-Jersey City	N.Y.-N.J.-Pa.	84
7	7	Columbus	Ohio	81
8		Detroit-Warren-Dearborn	Mich.	79
9	8	Washington-Arlington-Alexandria	D.C.-Va.-Md.-W.Va.	69
10		St. Louis	Mo.-Ill.	63

METROS WITH POPULATION 200,000 TO 1 MILLION

2018	2017	METRO	STATE	PROJECTS
1	1	Omaha-Council Bluffs	Neb.-Iowa	46
2	8	Dayton-Kettering	Ohio	40
3	10	Des Moines-West Des Moines	Iowa	34
4	3	Toledo	Ohio	30
5	9	Lincoln	Neb.	29
T6		Allentown-Bethlehem-Easton	PA-NJ	25
T6		Tulsa	Okla.	25
8	2	Greensboro-High Point	N.C.	24
T9		Lexington-Fayette	Ky.	23
T9		Reno	Nev.	23
T9		Savannah	Ga.	23

METROS WITH POPULATION LESS THAN 200,000

2018	2017	METRO	STATE	PROJECTS
1	T2	Bowling Green	Ky.	16
2		Ames	Iowa	13
T3	T2	Gainesville	Ga.	10
T3	1	Sioux City	Iowa-Neb.-S.D.	10
T5		Albany	Ga.	8
T5		Dubuque	Iowa	8
T5		Odessa	Texas	8
8		Columbus	Ind.	7
8	5	Florence-Muscle Shoals	Ala.	7
T10		Blacksburg-Christiansburg-Radford	Va.	6
T10		Muskegon	Mich.	6
T10	9	Saginaw	Mich.	6

Source: Conway Projects Database

calendar year. The projects range from the massive distribution cluster in Will County populated by such firms as Diageo and IKEA to the office and manufacturing projects landing in such places as Arlington Heights, Wheeling, Bolingbrook, Elgin, Carol Stream and Naperville from the likes of Faber-Castell, IHerb, G&W Electric and Givaudan Flavors.

But the core of activity is in Cook County, where projects last year came from Facebook, Walgreens, Northrop Grumman and Komatsu, among others. Joining their ranks early this year (with a project to be counted toward the next year-end tally) was Ford Motor Company, which pledged to invest \$1 billion and create 500 new jobs at its Chicago Stamping and Assembly plants that will bring total payroll to 5,800.

"A lot of great things continue to happen here, HQ2 or not," says Pritzker, who today, alongside Ocident Co-Founder and CEO Chris Gladwin, leads an initiative to strengthen the area's technology and innovation leadership called P33 — so named because the goal is to "reclaim" the technological discovery crown the city wore when it hosted the 1933 World's Fair by the time of the city's bicentennial in 2033.

"We plan to make Chicago a magnet for technology's next era of creators and generate opportunity across all industries for everyone living in our city," Pritzker said at the organization's launch in October.

Some would say the magnetism is already pulling in plenty: The 2018 Cyberstates report from the Computing Technology Industry Association (CompTIA) ranked Chicago No. 8 in the country in net tech employment and 13th in year-on-year tech job growth between 2016 and 2017. The estimated direct contribution of the tech sector to the Chicago economy is \$43.4 billion, or 7.3 percent of the total.

Pritzker says the P33 strategy derives from a serious look in the mirror led by research from Accenture, Boston Consulting Group and McKinsey & Co., so that area leaders can know how the region stacks up against other cities and answer the question, as she puts it, "Where do we have an authentic right to dominate because of the assets we have?"

"If you think about technology and why somebody chooses to put a company in various places, you choose it for many reasons," she continues. "Talent. Both digital and physical connectivity. You need a welcoming place



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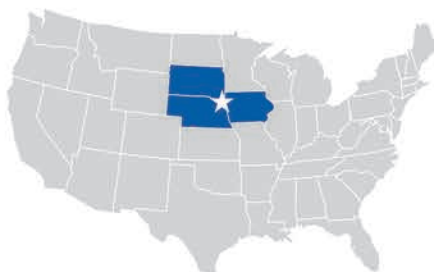
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Total U.S. office construction volume at the end of 2018 was 152.4 million sq. ft., with 4 of the 5 leading cities — New York, Dallas-Fort Worth, Chicago and Washington, D.C. — among Site Selection's Top 10 Tier 1 Metros.

that is also interesting for people to live in, but you need a healthy technology ecosystem so if people want to make it their home, they and their partners have options for living and working. Industry 4.0, bioscience, food and agriculture, business technology — these are clusters Chicago has enormous strengths in. With P33, we bring universities, incubators, business leaders in pure tech and all kinds of companies, labs, commercialization organizations, training organizations and venture capitalists all together.”

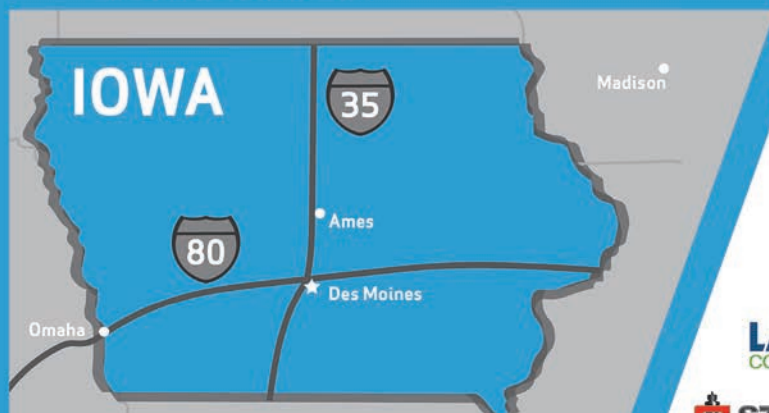
In addition to hosting the second highest concentration of computer science graduates in the U.S. and ranking sixth in the number of

STEM workers who live there, Greater Chicago startups lead the nation in venture returns, with an 8.5x multiple on invested capital. Some of that capital has come thanks to the efforts of venture capitalist and billionaire J.B. Pritzker, Penny Pritzker's brother and the newly elected governor of Illinois.

“I am biased,” his sister admits. Asked about the challenges the state faces despite its biggest city's shine, she says, “I think our new governor is trying to tackle some of the challenges not tackled by his predecessors — stabilize the pension system, make sure we're investing in the education system. And he's doing it in a

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Giving Back, Giving a Leg Up

As it happens, Mayor Emanuel just released the city's 50 "Resilient Chicago" initiatives as part of the 100 Resilient Cities program led by the Rockefeller Foundation. Socio-economic inclusion and corporate social responsibility are

high on the metro's and state's priority lists. And they've always been high on Penny Pritzker's list too, starting with the Pritzker Traubert Foundation she founded with her husband Dr. Bryan Traubert.

"Inclusivity is so critical — it's something that's been a focus of mine since I was out of school," she says. "Access to opportunity, education, soft skills training, mentoring. It's critical to have a community work at all levels."

Two recent examples highlight higher education connectivity. In December, Mayor Emanuel joined City Colleges of Chicago and



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2018 TOP METROS PROJECT RANKINGS

REGION

NORTHEAST

2018	2017	METRO	STATE	PROJECTS
1	1	New York-Newark-Jersey City	N.Y.-N.J.-Pa.	84
2	2	Pittsburgh	Pa.	56
3	3	Philadelphia-Camden-Wilmington	Pa.-N.J.-Del.-Md.	34
4	4	Boston-Cambridge-Newton	Mass.-N.H.	31
5	5	Allentown-Bethlehem-Easton	Pa.-N.J.	25
T6		Bridgeport-Stamford-Norwalk	Conn.	12
T6	T6	Rochester	N.Y.	12
8		Albany-Schenectady-Troy	N.Y.	10
T9	T8	Providence-Warwick	R.I.-Mass.	9
T9		Syracuse	N.Y.	9

SOUTH ATLANTIC

2018	2017	METRO	STATE	PROJECTS
1	1	Atlanta-Sandy Springs-Roswell	Ga.	166
2	2	Washington-Arlington-Alexandria	D.C.-Va.-Md.-W.Va.	69
3	3	Charlotte-Concord-Gastonia	N.C.-S.C.	62
4		Virginia Beach-Norfolk-Newport News	Va.-N.C.	51
5	4	Tampa-St. Petersburg-Clearwater	Fla.	41
6	6	Miami-Fort Lauderdale-West Palm Beach	Fla.	40
7	5	Philadelphia-Camden-Wilmington	Pa.-N.J.-Del.-Md.	34
8	7	Greensboro-High Point	N.C.	24
9		Savannah	Ga.	23
T10	T8	Charleston-North Charleston	S.C.	21
T10		Richmond	Va.	21

EAST NORTH CENTRAL

2018	2017	METRO	STATE	PROJECTS
1	1	Chicago-Naperville-Elgin	Ill.-Ind.-Wis.	422
2	2	Cincinnati	Ohio-Ky.-Ind.	103
3	3	Columbus	Ohio	81
4	5	Detroit-Warren-Dearborn	Mich.	79
5	7	St. Louis	Mo.-Ill.	63
6	6	Louisville/Jefferson County	Ky.-Ind.	60
7	4	Indianapolis-Carmel-Anderson	Ind.	54
8	8	Cleveland-Elyria	Ohio	50
9	9	Minneapolis-St. Paul-Bloomington	Minn.-Wis.	43
10		Dayton-Kettering	Ohio	40

SOUTH CENTRAL

2018	2017	METRO	STATE	PROJECTS
1	2	Dallas-Fort Worth-Arlington	Texas	207
2	1	Houston-The Woodlands-Sugar Land	Texas	165
3	3	Cincinnati	Ohio-Ky.-Ind.	103
4	4	Louisville/Jefferson County	Ky.-Ind.	60
5	5	Austin-Round Rock	Texas	59
6	6	Nashville-Davidson-Murfreesboro-Franklin	Tenn.	45
7	T7	San Antonio-New Braunfels	Texas	30
8		Tulsa	Okla.	25
9		Birmingham-Hoover	Ala.	24
10		Lexington-Fayette	Ky.	23

global aerospace and defense aftermarket solutions firm AAR to announce the new Aviation Futures Training Center to train students in aviation sheet metalworking. AAR will partner with Olive-Harvey College to prepare students for in-demand jobs in aviation, heavy manufacturing, boating, automotive repair, and HVAC.

"The shortage of middle skills workers in aviation and manufacturing is at acute levels in de-industrialized cities in the Midwest, like Chicago," said John Holmes, AAR president and CEO. "AAR is actively working with colleges to recruit and upskill workers to get them in the pipeline faster to address the short supply." According to the Great Cities Institute at the University of Illinois at Chicago, there were 58,000 unfilled manufacturing jobs in Cook County last year, and one in three manufacturing workers in the metro area is over the age of 55.

Rosalind Franklin University of Medicine and Science (RFU) in North Chicago has received \$2.5 million in expendable funding through federal new markets tax credits to support the development of its under-construction \$50-million, four-story Innovation and Research Park. RFU intends to use a portion of these funds for community initiatives, including the development of bioscience-related job training and internship opportunities, and an expansion of its efforts to provide health services to the uninsured and mentoring and educational pathways to underserved students.

"This funding will help us discover and deliver new treatments and cures across the nation and the globe," said RFU Interim President Dr. Wendy Rheault. "But its most visible and immediate impact will be in our own backyard, as we reach deeper into our community to offer opportunities that will improve the health of our people and local economies."

Slated for completion in late summer 2019, the Innovation and Research Park is a public/private partnership among RFU, the City of North Chicago, Lake County, Illinois Department of Commerce and Economic Opportunity and not-for-profit developer TUFF, The University Financing Foundation.

'A Welcoming Place'

Asked if she's observed corporate social responsibility measures taking hold with the corporate leaders she's encountered during



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TIER 3 IN POPULATION, TIER 1 IN YOUR HEART

Now you're cooking with gas. That phrase, originated by the natural gas industry in the 1930s, has come to signify being on the right track. It took on literal meaning in June 2018, when Crown Verity, a Canadian maker of outdoor commercial and residential cooking equipment including gas grills, chose to build a \$3.6-million building where it would create 25 new jobs in Bowling Green, Kentucky, our No. 1 Tier-3 metro area for 2018.

The site chosen by Crown Verity was a Build-Ready certified site in Bowling Green's Kentucky Transpark. With a Build-Ready site (currently numbering 15 throughout Kentucky, with multiple sites at locations such as the Transpark), a pad has already been developed, utilities are in place and regulatory approvals already have been granted. That explains why Crown Verity had broken ground and started building less than three weeks after the project announcement.

"The decision to locate in Bowling Green was partly a logistics exercise," said Crown Verity President Andy Incitti and CEO Bill Verity at that event, "but mainly, it was a cultural and systematic fit. The great people of Bowling Green, led by the Chamber of Commerce, showed us quickly that this was the right place to set up and continue our business growth."

Availability of land, access to freeways and a strong labor pool were crucial factors in the location decision. The company plans to distribute all its American-market products in Kentucky starting in 2019.

"We have experienced great success with our proactive and comprehensive approach to real estate development in the Transpark," said Ron Bunch, president and CEO of the Bowling

Green Area Chamber of Commerce. "In this case, we knew Crown Verity was interested in beginning operations within a six-month timeframe. We are ecstatic that the company selected our community in a relatively short period of time for their first U.S. location."

They aren't the only international investors to discover the Transpark, where other operations come from such companies as Austrian-owned Alpla; Japanese-owned American Howa Kentucky; French and Japanese joint venture corporation Constellium-UACJ; German-owned Bilstein Cold Rolled Steel; Canadian-owned Bowling Green Metalforming; Canadian-owned Cannon Automotive Solutions; and German-owned Rhenus Automotive Systems.

In December 2018, Kobelco Aluminum Products & Extrusions Inc. announced a \$42-million, 90-job expansion of its facility in Bowling Green, the company's second major investment in the city in less than two years.

Bowling Green is known for a couple more famous institutions: Western Kentucky University, and the National Corvette Museum. WKU boasted a combined undergraduate and graduate enrollment of more than 20,000 in fall 2017, and continues to expand its course, cultural and community offerings. Meanwhile, the museum in January purchased more than 208 new acres of land adjacent to the museum's NCM Motorsports Park.

"Bowling Green is currently the fastest growing city in Kentucky," said Wendell Strode, executive director of the National Corvette Museum, "and our goal at the Museum and Motorsports Park is to continue to enhance our offerings for both locals and visitors."

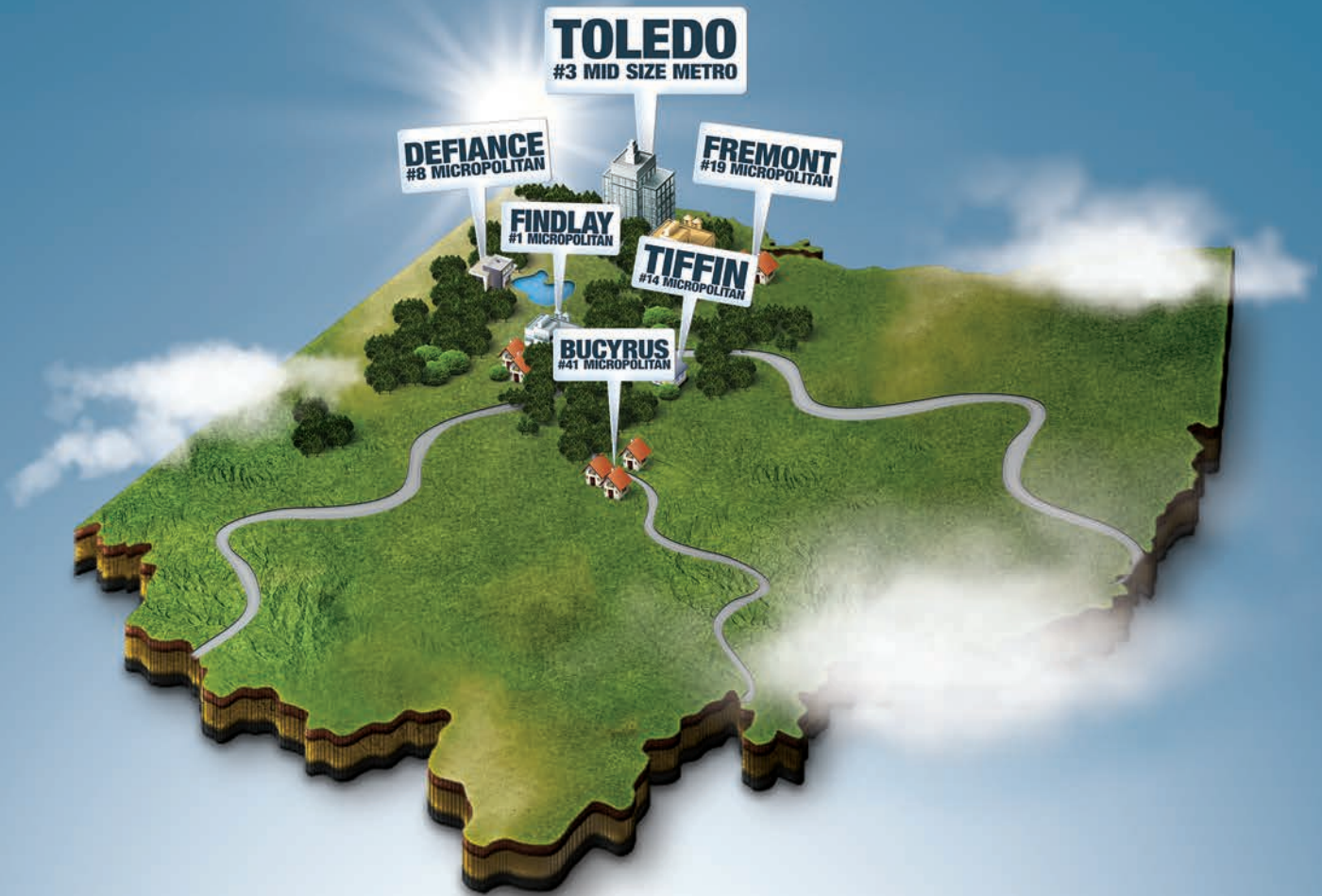
Bowling Green, Kentucky's third-largest city, is home to Western Kentucky University and to Beech Bend Amusement Park's highly rated Kentucky Rumbler wooden rollercoaster.

Photo courtesy of Bowling Green Chamber of Commerce



CORPORATE INVESTMENT RANKS HIGH IN NORTHWEST OHIO

Communities across Northwest Ohio dominated the rankings in Site Selection magazine's annual Governor's Cup Awards, with six cities receiving the prestigious recognition.



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2018 TOP METROS PROJECT RANKINGS BY REGION

WEST NORTH CENTRAL

2018	2017	METRO	STATE	PROJECTS
1	2	St. Louis	Mo.-Ill.	63
2	T3	Omaha-Council Bluffs	Neb.-Iowa	46
3	T3	Minneapolis-St. Paul-Bloomington	Minn.-Wis.	43
4	1	Kansas City	Mo.-Kan.	38
5	7	Des Moines-West Des Moines	Iowa	34
6	5	Lincoln	Neb.	29
7		Ames	Iowa	13
8		Cedar Rapids	Iowa	12
9	6	Sioux City	Iowa-Neb.-S.D.	10
9	9	Springfield	Mo.	10

MOUNTAIN

2018	2017	METRO	STATE	PROJECTS
1	1	Phoenix-Mesa-Scottsdale	Ariz.	60
2	3	Las Vegas-Henderson-Paradise	Nev.	35
3	T6	Reno	Nev.	23
4	2	Denver-Aurora-Lakewood	Colo.	22
5	5	Albuquerque	N.M.	10
6	T8	Tucson	Ariz.	7
7	4	Salt Lake City	Utah	5
8		Las Cruces	N.M.	4
T9		Boise City	Idaho	3
T9		Cheyenne	Wyo.	3
T9		Twin Falls	Idaho	3

PACIFIC

2018	2017	METRO	STATE	PROJECTS
1	1	Los Angeles-Long Beach-Anaheim	Calif.	46
2	4	Riverside-San Bernardino-Ontario	Calif.	21
3	2	San Francisco-Oakland-Hayward	Calif.	20
4	3	San Diego-Carlsbad	Calif.	17
5	T7	San Jose-Sunnyvale-Santa Clara	Calif.	13
6	T5	Sacramento-Roseville-Arden-Arcade	Calif.	11
7	9	Seattle-Tacoma-Bellevue	Wash.	10
8	T5	Portland-Vancouver-Hillsboro	Ore.-Wash.	9
T9	T10	Bakersfield	Calif.	6
T9	T7	Fresno	Calif.	6

Source: Conway Projects Database

her days before, during and after her time in Washington, Pritzker says, "First of all, it sure has taken hold among the corporate leaders in Chicago. And I've seen it more and more among the Fortune 500. I was just talking with Brian Moynihan on a panel at Davos. He has 200,000 employees at Bank of America — the responsibility starts with your employees, but also with the community you're in.

"The companies I'm involved in get that," she says. "I was on the boards of Hyatt, Microsoft, and Wrigley, and they all understood the importance of the kind of leadership a company can bring. It's critical and it's necessary. More and more mayors and governors recognize they need to listen to business leaders. And likewise, business leaders recognize they need to listen to the community. More and more CEOs recognize it's not enough to just take care of your shareholders. It's also the communities you do business in. That's an expectation of your customers, and of the place you plant your flag."

Pritzker planted her flag in the city when she moved to the area 34 years ago from San Francisco, and says she found the people warm and welcoming from the beginning. Moreover, they are creative, work hard and with a certain distinctive pride.

"I find it a phenomenal place to live," she says. "And culturally, the place is on fire. Last night, I went to the world premiere of the ballet 'Anna Karenina.' It was masterful, phenomenal. I went to the theater last week. It's a vibrant, exciting place, and it's also diverse. Yet people have this natural affinity for working together. They care about the place, and want to make it a community."

'Reverse Talent Flow'

Among Pritzker's observations about all sizes of cities from her career and her time as Commerce secretary is this: "I think mayors matter a lot," from making the city run to growing a metro area's population and tax base. A look behind the data also reveals that strong mayors, institutional and civic leaders are one factor behind these regions' economic development prowess.

A glance at the top metros across all three population tiers this year reveals a preponderance of Midwestern places: Eighteen of the 30 metro areas are within a swath from just east of the I-75 corridor to the foothills of the Rockies. Five of them touch or wholly inhabit Iowa. Ohio hosts

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WATCH MUSKEGON



Photo courtesy of: Jeff Gerrans



Photo courtesy of: Great Lakes Outreach Media

four. And Michigan, Kentucky and Nebraska host three apiece. But other regions stand out too: Four of the 30 Top-10 metros are in Georgia, while three are found in Texas.

James Fallows, in remarks to the annual conference of the International Economic Development Council in Atlanta last October, saluted civic and institutional difference-makers as he recounted the five-year small-plane journey he and his wife and co-author Deborah made back and forth across the country for their eye-opening book “Our Towns.”

“Everybody should see the country from 2,000 feet up,” he said. “The view is so rich: You see why cities are where they are.”

Once on the ground, the couple discovered more. Despite the souring national political climate, when they went from city to city and region to region they saw “people believing they are making positive advancement in addressing problems,” he said. They are “practical-minded, getting some traction and having some agency.”

but in their actual functioning, quite similar,” Fallows said. “We saw institutional experiments and innovation with schools, libraries and with community colleges, which we argue are the crucial part at this stage of America’s economic history.” Yes, research universities still can be the catalysts in many of this year’s Top Metros (see Lincoln, Nebraska; Lexington, Kentucky; Bowling Green, Kentucky; and Ames, Iowa). “But at this time of economic dislocation we were struck by the role that community colleges are playing,” said Fallows, in exposing students to new opportunities in skilled trades, and in training them for the occupations taking the place of those old jobs gone by the wayside.

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We plan to make Chicago a magnet for technology’s next era of creators and generate opportunity across all industries for everyone living in our city.”

— Former U.S. Secretary of Commerce and P33 Co-Founder Penny Pritzker

It’s a view most Americans have lost sight of and need to see again, he said. They may be outwardly downcast about the state of the nation, “but at the same time people’s views of their own communities have been going up and up.”

They also saw what they call “reverse talent flow,” i.e. the opposite of the usual trend where big cities just keep getting bigger, attracting more companies and more talent. Now some of that critical mass is beginning to trickle back.

“We were struck by how often people have worked in those places, but the overall picture for them was better in Sioux Falls or Sacramento or Redlands,” said Fallows. Once in those towns, the talent is finding what the authors found: a practical-minded functionality in local government and civic life that not only runs counter to the national narrative but may be ignoring it completely.

“Greenville, South Carolina, and Burlington, Vermont, are opposites on the political grid,

Greater Omaha Chamber, in the metro area ranked No. 1 in its population tier once again this year, followed by Dayton-Kettering, Ohio, at No. 2 and Des Moines-West Des Moines at No. 3.

The Chamber’s 2018 Economic Outlook Survey of 147 area CEOs found that around 60 percent said that their sales revenue increased in 2018, compared to 2017, and around 40 percent said their companies expect to increase the amount of capital investment and employment. Just under half expect to increase the number of employees in their company in 2019, and more than one-third (38 percent) plan to invest more capital in 2019 than 2018.

Judging by last year’s project count, that’s saying something, as Site Selection tallied major investments in metro Omaha from Facebook, MetLife, Mutual of Omaha, Yahoo, Elliott Equipment and VM Innovations. Some of the investors in Omaha and in No. 4 Tier-2 metro Lincoln are seeing support from five Nebraska

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- **"This Is The Absolute Best Model For Startup Success"** [Inc., 2019]
- **Midwest's fastest-growing economy** [U.S. Bureau of Economic Analysis, 2017]
- **Best North American regional airport** [World Airport Awards, 2017]
- **2nd best city for new college grads** [SmartAsset, 2018]
- **#1 "Least Expensive City" where \$100 has the most buying power** [Policy Genius, 2018]
- **10th best city for STEM professionals** [Wallethub, 2019]
- **Top 10 alternative cities for young professionals** [moveBuddha, 2017]



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Five of the 31 total Top Metros across three population tiers touch or wholly inhabit Iowa.


Business Innovation Act programs that first went into effect after the 2011 session of the Nebraska Legislature and are designed to promote successful entrepreneurial firms by providing access to capital in early stages of product development.

A report on those programs' economic impact published last year by the University of Nebraska Bureau of Business Research found that firms that provided data for the study reported receiving over \$22.5 million in funding through BIA program, then raising \$100.3 million in capital after receiving that support, equating to \$4.46 for every dollar of state support. The study also found that participating businesses have already earned \$100.6 million in revenue, which is equivalent to \$4.47 in revenue for every \$1 of state support. The firms also have added

630 new jobs in the state with annual wages of \$32.6 million since initial participation in BIA programs. In this way, one state policy with civic-level, entrepreneurial impact is helping boost multiple metros' economic development.

Both Nebraska metros also benefit, like Chicago, from a lower cost of living. According to the community cost of living indexes compiled for 268 U.S. urban areas by C2ER, Lincoln's and Omaha's weighted average composite value was well below the U.S. average of 100.0 at 94.8. Meanwhile, the state's 2010 population was 1,826,341 (6.7 percent higher than 2000) and the Census Bureau's estimate of the state's 2017 population reached 1,920,076, or 5.1 percent higher than the 2010 Census.

Omaha and Lincoln would happily welcome more fast to help the state break the 2 million barrier, as unemployment is at record lows: In December 2018, it was 2.7 percent in Omaha and 2.3 percent in Lincoln, after the state added 12,525 non-farm jobs since the previous December. That makes new legislation under consideration in



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Lincoln all the more urgent.

University of Nebraska President Hank Bounds in February joined Mutual of Omaha Chairman and CEO James Blackledge and other business and education leaders to testify in the state capitol on behalf of the H3 Careers Scholarship Act, which would provide \$10 million in 2019-20, \$20 million in 2020-21 and \$30 million annually thereafter for scholarships in high-skill, high-demand, high-wage areas as determined by Nebraska's Department of Labor.

Current examples include nursing, engineering, software development and accounting. More than two-thirds of the state's 35,000 projected H3 openings will require an associate's degree or higher. But Nebraska isn't currently producing the workforce those fields need. Nebraska will have 1,500 openings for registered nurses in the decade ahead, for example, 1,000 openings for accountants and auditors, and almost 400 openings for engineers. Additional scholarship support would make Nebraska more competitive in keeping the best and brightest talent in the

state, Bounds said.

"Nebraska's sons and daughters deserve opportunities to stay here," he said. "The fact is that in every community I visit, Nebraskans tell me the same thing: 'Our No. 1 need is workforce, our No. 2 need is workforce and our No. 3 need is workforce.'"

"Businesses will go wherever the talent is," said Mutual of Omaha's Blackledge, even as the company just completed an expansion. "The implications of our continuing to lose a significant number of our best and brightest to other states are profound, lasting and perhaps irreversible. (Mutual of Omaha's) demand for technology talent, and that of other companies in our state, cannot be met without strategic initiatives such as LB639 aimed at developing and retaining a talented workforce in Nebraska."

In other words, as James Fallows told the IEDC audience in Atlanta, "Economic development matters more now, because the local and regional level is where the possibility is, where the leverage is, and where the action should be." ▼

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COME TOGETHER

by GARY DAUGHTERS

gary.daughters@siteselection.com

Ohio's winning ways stem from collaboration and commitment to community.

Micropolitan is a fancy word for a small town. The U.S. Census Bureau provides an exhaustive definition, but when it comes down to it, a micropolitan statistical area (MSA) is a geographic region of one or more counties with one city of 10,000 to 50,000 people. Micropolitans are sprinkled throughout the state of Ohio, and some are right out of a work by Norman Rockwell.

Charming, yes. Sleepy, no. Not in Ohio, as emphatically shown in Site Selection's ranking

of Top Micropolitans for 2018. In 2018, as in the three previous years, Ohio produced more Top 100 micropolitans — 17 — than any other state. Four Ohio micropolitans — Findlay, Wooster, Ashland and Defiance — made the Top 10. Perhaps most impressive of all, micropolitan Ohio's 109 qualifying investments dwarfed those of second-place Kentucky, which totaled 40. The remainder of the Top 10 include Georgia, North Carolina, Nebraska, Texas, Tennessee, Indiana, Alabama and Pennsylvania.



"The quality of life is a true selling point." Second-ranked Wooster gathers for the holidays.

Photo courtesy of Wayne Economic Development Council



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1 downtown
revitalized

findlayhancockED.com

FINDLAY, OHIO				
TOP PROJECTS BY CAPITAL INVESTMENT				
Company	City	New/Expansion	\$US Millions	Jobs
Home Depot Rapid Deployment Center	Van Buren	E	25	
MITEC Powertrain	Findlay	E	20	77
Nissin Brake Ohio	Findlay	E	15	
Whirlpool Corp.	Findlay	E	13	260
Hamlet Protein	Findlay	E	12	

Source: Conway Projects Database

No. 1: Findlay

The best athletes work like mad to remain at the tops of their games. The best teams play through injuries and put individual egos aside.

So it is with Findlay, which might be seen as the concentrated essence of small town Ohio. With 23 qualifying investments, Findlay, an hour south of Toledo, is Site Selection's top micropolitan for the fifth straight year. It's a record of dominance that has helped propel the town of 41,000 residents to superstar

status, so much so that Tim Mayle, director of Findlay-Hancock County Economic Development, is forever being asked to explain the "Findlay Formula."

"What sets Findlay apart," Mayle tells Site Selection, "is our ability to collaborate within the community to solve problems. We have the ability in Findlay to pull everybody together."

And that includes the business community.

"I've seen how people work together to truly try to find the ideal 'win-win' for Findlay," says Dale

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Representing Economic Development in
Southern Ashland County



30-year electrical equipment wiring contractor choosing to continue expansion in Northern Ashland County.

Professional healthcare laundry facility choosing the City of Ashland for its first regional expansion.



Grassroots entrepreneurs choosing Downtown Ashland to open a microbrewery and restaurant.

Laws, vice president of manufacturing operations for Whirlpool, one of Findlay's top employers. "It's been that mindset that has contributed to the great success that Findlay has seen."

Whirlpool, which last year plowed another \$13 million into its Findlay dishwasher plant, is one of the town's "Big Three" of repeat investors, which also includes Marathon Petroleum and Cooper Tire and Rubber Company. Marathon and Cooper deploy their top brains to Findlay, as each has its headquarters there.

Findlay also brings a powerful bench to the game, especially in logistics and the automotive industry. Findlay's 2018 investors include MITEC Powertrain (\$20 million), Freudenberg (\$3.7 million), Nissin Brake (\$15 million), Home Depot Rapid Deployment Center (\$25 million), Ohio Logistics (\$7 million) and Best Buy Warehousing Logistics (\$2 million).

In keeping with the notion that you're either getting better or you're getting worse, the past year ushered in three transformative changes to Findlay's business community:

- In April, Marathon announced the \$23-billion purchase of its rival, Andeavor, thus creating the nation's largest independent U.S. refiner by capacity. Marathon CEO Gary Heminger, a Findlay native, will run the combined company.

"We now have 16 refineries, 4,000 convenience stores, 8,500 Marathon-branded locations, 10,000 miles of pipeline and one of the biggest inland



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TOP 10

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2018 TOP MICROPOLITAN BY NUMBER OF PROJECTS

Micropolitan	Projects	Micropolitan	Projects
1 Findlay, Ohio	23	T41 Celina, Ohio	3
2 Wooster, Ohio	17	T41 Zanesville, Ohio	3
3 Batavia, N.Y.	13	T41 Athens, Tenn.	3
4 Shelby, N.C.	12	T41 Crossville, Tenn.	3
T5 Tupelo, Miss.	11	T41 Union City, Tenn.-Ky.	3
T5 Ashland, Ohio	11	T41 Corsicana, Texas	3
7 Cullman, Ala.	10	T41 Lufkin, Texas	3
8 Defiance, Ohio	9	T41 Big Stone Gap, Va.	3
9 Wilson, N.C.	8	T41 Sheridan, Wyo.	3
T10 Angola, Ind.	7	T62 Albertville, Ala.	2
T10 Danville, Ky.	7	T62 Troy, Ala.	2
T10 Orangeburg, S.C.	7	T62 Douglas, Ga.	2
T10 Danville, Va.	7	T62 Fitzgerald, Ga.	2
T14 London, Ky.	6	T62 Jefferson, Ga.	2
T14 Beatrice, Neb.	6	T62 Jesup, Ga.	2
T14 Tiffin, Ohio	6	T62 LaGrange, Ga.	2
T14 Wapakoneta, Ohio	6	T62 Freeport, Ill.	2
T14 Manitowoc, Wis.	6	T62 Auburn, Ind.	2
T19 Blytheville, Ark.	5	T62 Frankfort, Ind.	2
T19 Thomasville, Ga.	5	T62 Huntington, Ind.	2
T19 Waycross, Ga.	5	T62 Warsaw, Ind.	2
T19 Glasgow, Ky.	5	T62 Bardstown, Ky.	2
T19 Mayfield, Ky.	5	T62 Maysville, Ky.	2
T19 Ogdensburg-Massena, N.Y.	5	T62 Mount Sterling, Ky.	2
T19 Sanford, N.C.	5	T62 Minden, La.	2
T19 Fremont, Ohio	5	T62 Hannibal, Mo.	2
T19 Sidney, Ohio	5	T62 Lebanon, Mo.	2
T19 Greenwood, S.C.	5	T62 Sedalia, Mo.	2
T29 Selma, Ala.	4	T62 Columbus, Neb.	2
T29 Bainbridge, Ga.	4	T62 Fremont, Neb.	2
T29 Calhoun, Ga.	4	T62 Scottsbluff, Neb.	2
T29 Plymouth, Ind.	4	T62 Auburn, N.Y.	2
T29 Frankfort, Ky.	4	T62 Rockingham, N.C.	2
T29 Madisonville, Ky.	4	T62 Washington, N.C.	2
T29 Opelousas, La.	4	T62 New Philadelphia-Dover, Ohio	2
T29 Hastings, Neb.	4	T62 Norwalk, Ohio	2
T29 Kearney, Neb.	4	T62 Salem, Ohio	2
T29 Marion, N.C.	4	T62 Wilmington, Ohio	2
T29 New Castle, Pa.	4	T62 Meadville, Pa.	2
T29 Somerset, Pa.	4	T62 Pottsville, Pa.	2
T41 Talladega-Sylacauga, Ala.	3	T62 Sayre, Pa.	2
T41 Cordele, Ga.	3	T62 Gaffney, S.C.	2
T41 McPherson, Kan.	3	T62 Seneca, S.C.	2
T41 Adrian, Mich.	3	T62 Watertown, S.D.	2
T41 Vicksburg, Miss.	3	T62 Cookeville, Tenn.	2
T41 Norfolk, Neb.	3	T62 Martin, Tenn.	2
T41 Plattsburgh, N.Y.	3	T62 Pecos, Texas	2
T41 Albemarle, N.C.	3	T62 Plainview, Texas	2
T41 Roanoke Rapids, N.C.	3	T62 Rio Grande City, Texas	2
T41 Ashtabula, Ohio	3	T62 Sevierville, Tenn.	2
T41 Bellefontaine, Ohio	3	T62 Sulphur Springs, Texas	2
T41 Bucyrus, Ohio	3		

Source: Conway Projects Database

barge systems in the country,” Heminger tells Site Selection.

Several hundred people, representing some of Andeavor’s top talent, will be relocating to Findlay, Marathon’s home for 130 years.

“We could go anywhere with our headquarters,” says Heminger, “I’ve had offers from big cities around the country. But you can’t replace the knowledge, experience and tremendous work ethic that the people of northwest Ohio bring to the table.”

- With one year left on her second four-year term, Findlay Mayor Lydia Mihalik was tapped to lead the Ohio Development Services Agency by newly elected Governor Mike DeWine. Mihalik spearheaded Findlay’s rise to the top of Site Selection’s annual rankings. She chuckles when asked if she’ll employ the Findlay Formula throughout small-town Ohio.

“What’s happening in Ashland is different from Defiance. What’s happening in Findlay is different from Wooster,” she says. “Every community has its different areas of

uniqueness. But, really, what stands out is that midwestern pride and work ethic. These communities are oriented toward solutions.”

- In October, officials from Findlay and Hancock County launched the first phase of a long-awaited project to stem the city’s flooding problem. Findlay’s history of flooding dates back to 1913, and the Blanchard River and its tributaries overflowed most recently two years ago. Mayle says the issue spooked at least one company that was considering Findlay for its headquarters.

“They said ‘absolutely not. We’re not coming until you take care of flooding.’ ”

The initial phase of flood mitigation, paid for in part by a flood tax the town enacted, is to widen the Blanchard along a half-mile stretch just north of the city’s center.

“This has been 100 years in the making,” says Mayle. “We all worked together, and that means the city, the county, the agricultural community and the business community.”

He says Findlay hopes to leverage flood

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BREAKING NEW GROUND



WOOSTER, OHIO

TOP PROJECTS BY CAPITAL INVESTMENT

Company	City	New/Expansion	\$US Millions	Jobs
Morgan Corp.	Orrville	N	23	139
Xcess Limited	Wooster	E	7	125
Fort Wayne Metals	Wooster	E	4	42
Prentke Romich Corp.	Wooster	E	4	30
Western Reserve Group	Wooster	E	4	

Source: Conway Projects Database

mitigation for other benefits.

“How do we create areas along the river for people to gather? How do we tie in bike paths, amphitheaters? The Findlay Formula isn’t just economic development, it’s our entire community, and that’s ultimately what makes us successful.”

No. 2: Wooster

In 1897, Jerome Monroe Smucker began selling apple butter from a horse-drawn buggy

in Orrville, Ohio, on the outskirts of Wooster.

Today, the J.M. Smucker company is synonymous with fruit spreads and peanut butter, and a market leader in shortening and oils, ice cream toppings and beverages. Smucker still makes apple butter, too, and with 25 manufacturing operations spread across the United States, the company enjoyed 2018 net sales of \$7.3 billion. It still calls the Wooster region home.

“Orrville is home to our corporate headquarters and a state-of-the-art manufacturing facility,” says

Consistency Counts

Wooster/Wayne County, Ohio is the only micropolitan area to be named among the Top Ten in the U.S. for economic growth for 13 consecutive years.

Why? Because we’re collaborative, cost-effective and convenient to markets.

Join the growing list of companies that are experiencing success in our location.

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Ray Hancart, chief of corporate communications. "Wayne County has contributed to our success in many ways, but one of the principal contributions is the quality of life the area offers our employees. The quality of life in Wayne is a true selling point."

Wooster, the Wayne County seat, climbs to second in Site Selection's new ranking after third-place showings the previous two years. Its 17 qualifying projects represent capital investments totaling \$57.3 million, including \$42.2 million that went toward manufacturing.

"This is a great honor," says Tom Pukys of Wooster's climb in the rankings. Pukys, president of the Wayne Economic Development Council, says local businesses "are really focused on economic development."

Pukys describes Smucker, which employs 1,700 workers in corporate and 300 in manufacturing, as one of two anchors of the local economy. The other is Schaeffler, the Germany-based automotive supplier that, like Smucker, employs about 2,000 workers.

"Schaeffler's manufacturing success story in Wooster began with just six employees assembling clutches for the Plymouth Horizon/Dodge Omni compact cars," the company says in a statement. "Schaeffler has expanded the Wooster manufacturing campus 20 times, growing from 27,000 sq. ft. (2,508 sq. m.) to over 800,000 sq. ft. (74,322 sq. m.). What began as a team of six hardworking clutch assemblers has evolved into a peerless team of approximately 2,000 highly skilled employees driven by the electrification of the automotive powertrain and a dedication to help shape the future of mobility."

After a mammoth expansion in 2017 totaling \$60 million, Schaeffler is growing again. In October, the company announced a \$2.5-million plan to add nearly 21,000 sq. ft. (1,950 sq. m.) to its Wooster facility and to hire an additional 300 workers.

"In addition to serving as the company's global center of competence for its torque converter product line, the Wooster site is the leading facility for the development and production of Schaeffler's E-Mobility solutions in the United States," the company says.

Wooster's top project of 2018 was a \$23-million investment by Morgan Corporation, a Georgia-based company that calls itself North America's largest manufacturer of medium-duty truck bodies. After a lengthy site search throughout the Midwest, Morgan obtained a lease on a 340,000-sq.-ft. (31,587-sq.-m.) building formerly owned by JLG, a maker of aerial platforms. Morgan plans to hire about 140 workers, with full production to launch in early 2019.

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ASHLAND, OHIO

TOP PROJECTS BY CAPITAL INVESTMENT

Company	City	New/Expansion	\$US Millions	Jobs
Central Ohio Medical Textiles	Ashland	N	20	100
Eco-Flo Products	Ashland	E	13	
TWG Development	Ashland	N	9	
Brethren Care	Ashland	E	5	
Stone Creek Dental	Ashland	E	3	

Source: Conway Projects Database

Tied for No. 5: Ashland

There's nothing like the presence of a brewpub to indicate economic fermentation in a small-town economy. Doug Reynolds has seen it, himself, since he and his wife, Anna, opened Uniontown Brewing Co. in downtown Ashland, Ohio, in December of 2017.

"A year before we opened, 75 percent of the downtown buildings were leased," Reynolds tells Site Selection. "As of today, that's up to about 95 percent. Six buildings have sold since we opened. It's just a really good vibe downtown now."

"The word that pops out is 'catalyst,'" says Reynolds, an Ashland native. "The mayor comes in and talks to us about being at the forefront of a movement. It's awesome to hear those words."

"It's amazing to see," says Anna.

Uniontown, in 2018, expanded its payroll by 35 workers, one of 11 qualifying investments in the Ashland micropolitan that pushed the

perennial Top 10 finisher from a seventh-place tie in 2017 into a tie for fifth place in Site Selection's new rankings.

The roots of this diversifying local economy, not surprisingly, lie in manufacturing, says Kathy Goon, executive director of Ashland Area Economic Development. The county's 96 manufacturers include Pioneer National Latex, founded in Ashland in 1939. The world's most prolific latex balloon maker, Pioneer currently employs 111 workers, 20 percent of whom have been there longer than 30 years.

"Our town," says Goon, "was built on latex balloons."

With an output of 2.5 million balloons a day, Pioneer broke ground in June on a warehouse expansion for which it received a 50-percent reduction in property taxes for 10 years.

Other repeat investors include Perio, maker of Barbasol shaving cream, every can of which

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Cullman, Alabama is a thriving 21st Century community fueled by quaint heritage and an indelible Southern charm. Modern infrastructure, market access, modest business costs and an exceptionally business-friendly community have allowed Cullman to consistently attract new industries, making it a recognized leader in business and industrial development in the United States. Cullman is proud to have been named among Site Selection magazine's Top Micropolitan Areas every year since 2001.

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TOP 10 MICROPOLITAN PROJECTS BY CAPITAL INVESTMENT

Company	City	State	New/Expansion	\$US Millions	Jobs
Big River Steel LLC	Osceola	AR	E	1,200	500
International Paper Co.	Selma	AL	E	553	
Bridgestone Americas Tire Operations	Wilson	NC	E	266	
Agropur Coopérative	Lake Norden	SD	E	250	125
Viega	McPherson	KS	N	210	
Denso Corp.	Athens	TN	E	190	320
Whole Stone Farms	Fremont	NE	E	180	
Frito-Lay	Frankfort	IN	E	159	50
Pfizer	McPherson	KS	E	156	325
Portobello America	Baxter	TN	N	150	220

Source: Conway Projects Database

is produced in Ashland; Mansfield Plumbing Products; and Step2, which calls itself the country's largest manufacturer of preschool and toddler toys. Goon says the community's business recruitment strategy is built around achieving proper scale.

"Not that we wouldn't embrace Amazon or another bigger company," she says, "but we embrace the ones that are 100 to 150 employees. That's our sweet spot, because we can get them here, we can give them what they need and if they happen to fail or leave, it's not going to devastate the community."

COMTEX, a high-tech launderer that services hospitals, will invest \$41.2 million and expects to employ 75 workers at its 75,000-sq.-

ft. (6,968-sq.-m.) laundry facility. Myles Noel, COMTEX CEO, tells Site Selection that Ashland stood out among the company's other suitors.

"We would go to other locations and be met by an individual or a realtor or a developer. When we went to Ashland," Noel says, "we were met by a team, including an executive of Grow Ashland, the people responsible at the political level, the people responsible at the operational level, the chief engineer, the whole team."

"We were overwhelmed by the reception. Overwhelmed by the respect with which they treated us. It was really quite refreshing to find people who were so motivated to do the right thing for the community and so motivated to help us succeed." ▼

Beatrice was named

#1 MICROPOLITAN IN NEBRASKA

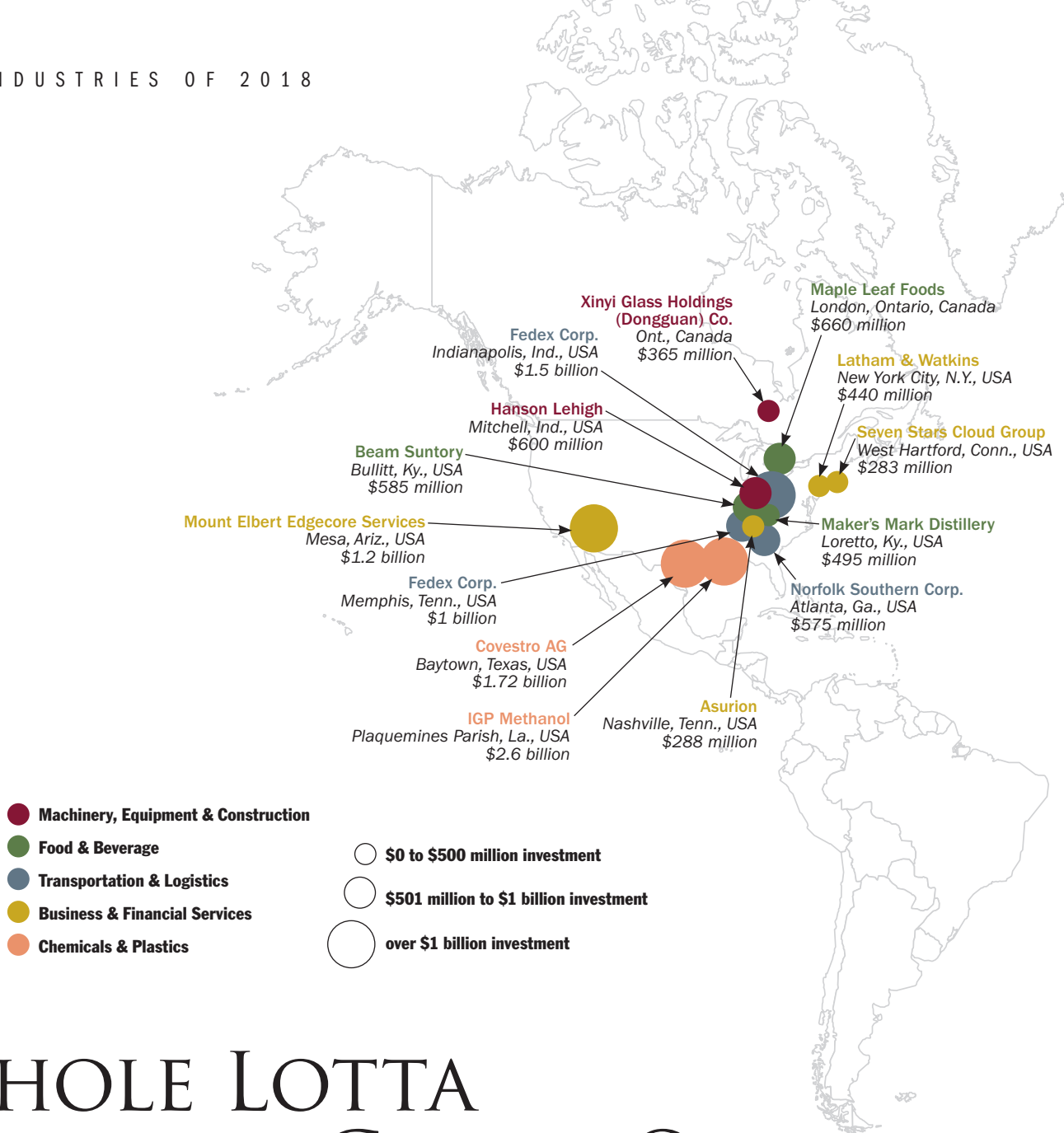
And we've got plenty of room for you.

Nebraska is a three time Governor's Cup recipient for 2016, 2017, & 2018 by number of projects per capita. Beatrice, was named 2018's #1 Micropolitan in Nebraska.

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WHOLE LOTTA BUILDING GOING ON

by ADAM BRUNS
adam.bruns@siteselection.com

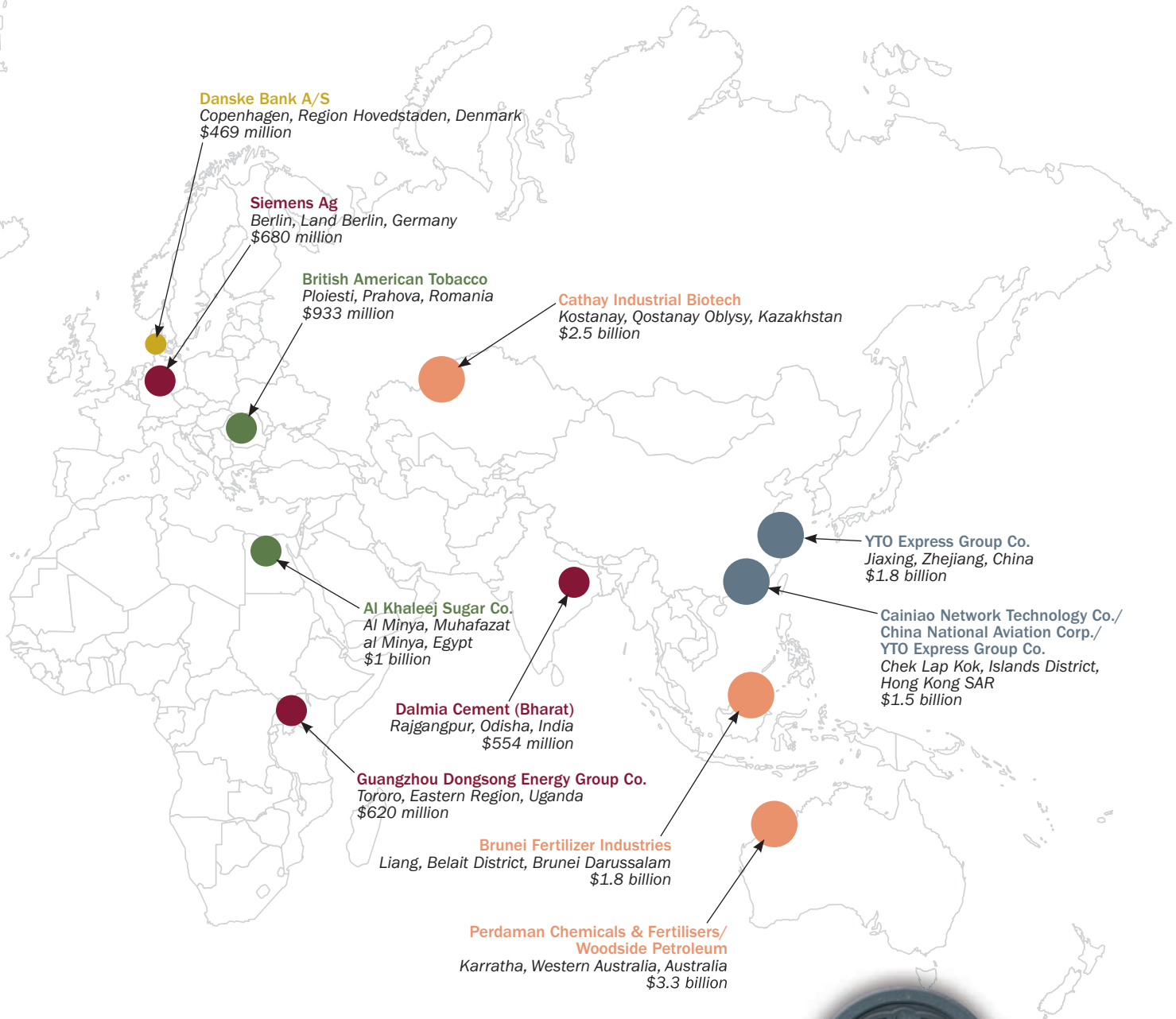
Following the same industry sector groupings that Conway's World's Most Competitive Cities report uses in evaluating regional economic strength, this year's tallies of the top industries of 2018 show machinery, equipment & construction leading the way. For most countries, that's a good sign.

That sector is followed by food & beverage, transportation & logistics (including e-commerce), business & financial services, and

chemicals & plastics. The map on these pages displays the top five projects by capital investment in each of these top five sectors.

A glance at the biggest investments across these sectors shows enough cement plants to construct a few competitive cities, a decided swing toward emerging markets, and a decided taste for sugar in either its sweetener or alcohol forms.

The next-busiest sectors were IT & communications, life sciences,



consumer products, automotive and metals, with electronics finishing just out of the Top 10 at No. 11 with 305 projects.

Transport & logistics and life sciences had twice as many new projects as expansions — a sign of those sectors' rapid growth as well as mobility. Chemicals & plastics (attracting the highest dollar amounts) and metals project totals were closest to even between greenfield and expansion investments, reflecting

accumulated investment in sites that are often multi-layered, legacy operations.

The numbers come from facility projects tracked worldwide in 2018 by Conway Analytics. To qualify for the Conway Projects Database, a project must involve new construction and must meet one of three criteria: 1) attract at least \$1 million in investment, 2) create at least 20 new jobs, or 3) create at least 20,000 new sq. ft. of space. ▼

2018 TOP INDUSTRIES BY NUMBER OF PROJECTS

Industry	New	Exp.	Total
Machinery, Equipment & Construction	468	322	790
Food & Beverage	378	282	660
Transport & Logistics	359	175	534
Business & Financial Services	312	210	522
Chemicals & Plastics	275	228	503

Source: Conway Projects Database

On The Hunt

There's no better place than Israel to scout for talent and ideas.

by ADAM BRUNS

adam.bruns@siteselection.com



Startup Genome's 2018 Global Startup Ecosystems report put it best: When it comes to global connectedness in terms of both entrepreneurial relationships and market reach, Tel Aviv — and by extension, Israel itself — shines brighter than the rest. That explains why more than 1,500 new high-tech companies are established annually in a nation barely larger than the U.S. state of New Jersey.

The report highlighted Tel Aviv's leadership in such clusters as cybersecurity, automotive, fintech, ad-tech and blockchain, even giving partial credit for New York's cybersecurity strength to a recent influx of office openings from top Israeli cyber firms.

As for automotive, "For a country that has no car manufacturing to speak of, Israel, and Tel Aviv in particular, has become a world center for autotech, with investment in the space jumping 200 percent over the past three years," said Eugene Kandel, CEO at Start-up Nation Central.

"We might not make the cars here," Kandel

told Startup Genome, "but we make the brains for the cars."

The organization itself has launched yet another successful focus called Israel Industry 4.0, or II4: "Currently, there are more than 200 companies in the Israel Industry 4.0 space, which is an increase of more than 50 percent over the last five years," said a February 2019 report. "The Israel Industry 4.0 ecosystem is rich with start-ups, incubators, automation vendors, MNCs, government and academic initiatives, as well as R&D centers for multinational industrial manufacturers, including Siemens and Merck."

II4 encompasses verticals from cybersecurity to aerospace to energy and metals, among other disciplines, and saw 36 deals totaling US\$347 million in 2018 after 61 deals during 2016-2017 totaling \$441 million.

Waze got its start here before Google bought it for \$1.3 billion. Autonomous-driving company Mobileye got its non-autonomous start here too, before Intel (which operates a major and steadily growing fab in Israel) acquired it for

Jerusalem's light rail network, launched in 2011, is just one more way that talent, ideas and firms connect throughout Israel.

Photo: Getty Images

\$15.3 billion — a new record for an Israeli company exit.

Intel Capital's latest investments include a newer startup called Pliops, which will use the funds to accelerate development of its storage processor technology for cloud storage and database applications, including expansion of its teams in the U.S., Israel and China. The firm, based in Ramat Gan, has developed technology that solves the scalability challenges raised by the cloud data explosion and the increasing data requirements of artificial intelligence and machine learning applications — in other words, the requirements that have come about in part because of other mind-blowing innovations by other Israeli firms.

Ecosystem for Ideas

This environment of constant discovery and connection has spawned a high degree of high-tech scouting activity. Some of these scouts, says Ziva Eger, Chief Executive at Invest in Israel and The Industrial Cooperation Authority (ICA) at the Ministry of Economy and Industry, “are lone start-up ‘hunters’ working for a multinational corporation (MNC) or foreign company, some are official MNC venture entities operated either by a local scouting team or by a scouting center, some operate as accelerators and incubators run by either MNCs or VCs, and some are agents trying to introduce local start-ups to potential capital.” A few of the 35 hubs include Citi Accelerator, Johnson Controls Open Innovation and Microsoft ScaleUp.

“They all share a common goal: to be the first to find the next best idea,” says Eger.

Those ideas are flowing in every direction, driven by an unparalleled national R&D infrastructure decades in the making; organizations such as Tel Aviv Global, HUstart, Jnext and BioJerusalem, among others; and a young population — 29 percent of Tel Aviv's population is between 18 and 35 years old. While that city leads in high tech, Jerusalem leads in life sciences: Startup Genome noted some 150 life sciences companies employ more than 3,000 people and accounted for more than 27 percent of area VC investment over the past six years. The Hebrew University

of Jerusalem is one of many institutions contributing to that heady mix.

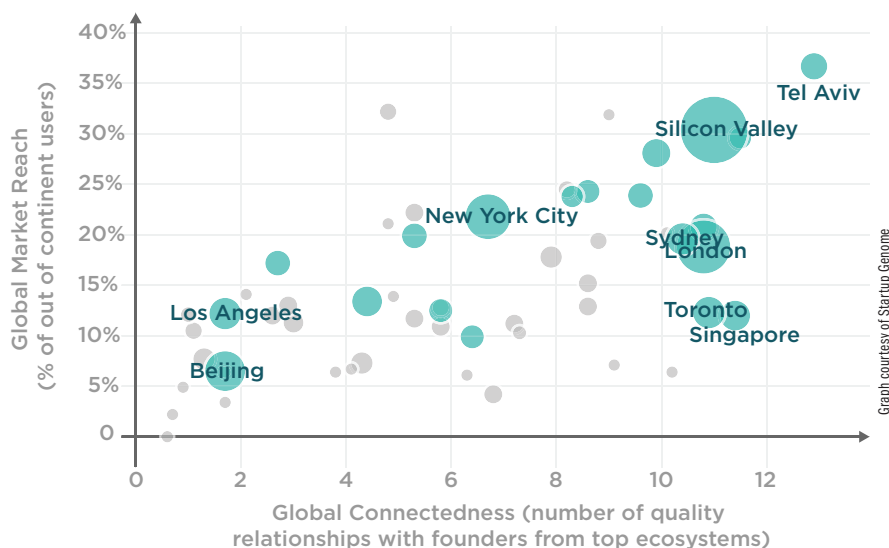
“There is no question that health-related research and development currently being conducted in Jerusalem is among the world's best,” Dr. Yaron Danieli, CEO of Yisum, the university's tech transfer unit, told Startup Genome. Further illustrating Israel's high degree of connectivity, Yisum in January 2019 announced the opening of three centers of international cooperation in Chicago, Illinois; Asunción, Paraguay; and Shenzhen, China.

The connections just keep multiplying — and that can accrue to the benefit of MNCs and entrepreneurs alike. Among the acquired companies that became new MNC R&D centers in Israel (often including advanced manufacturing too) are HP R&D center, established following the acquisition of Indigo; the Apple R&D center, established following the acquisition of Anobit; the Siemens R&D center, established following the acquisition of Solel Solar Systems; and Facebook's R&D center, established following the acquisition of Onavo.

In a nutshell, Start-Up Nation's II4 could easily be III4, with the extra “I” for innovation — an attribute and discipline that may be Israel's best cluster of all. ▼

Entrepreneur Connections and Global Market Reach

Bubble size indicates the percentage of Inbound Entrepreneur Connections.



This Investment Profile was prepared under the auspices of Invest in Israel, an integrative body within the Ministry of Economy and Industry that serves as a one-stop shop for a wide range of potential and existing investors, identifying lucrative investment opportunities, mapping potential obstacles and helping to fast-track investment. For more information, visit www.investinIsrael.gov.il or send an email to InvestInIsrael@economy.gov.il.



Steady As She Goes

Earning the trophy it last won five years ago is a tribute to Dubuque's enduring allure.

by ADAM BRUNS
adam.bruns@siteselection.com



You know a project is nearly complete when it's time to hang your shingle outside.

That's what happened in November 2018 at the new manufacturing plant that Dubuque, Iowa-based furniture manufacturer Flexsteel Industries had been building since October 2017 in the town it moved to from Minnesota in the 1930s. The project meant the retention of 200 jobs.

At the October 2017 groundbreaking for the \$25-million facility, company leaders remarked on the move from the place they'd called home for 80 years. But they also made a point of not abandoning that past.

In addition to constructing the new facility, Flexsteel donated nearly \$2.7 million and acres of land that encompasses the current Jackson Street facility to Dubuque Initiatives, a non-profit

corporation dedicated to the revitalization of downtown Dubuque.

"Most companies, most communities, would turn their back on what is left behind," said Rick Dickinson, president and CEO of Greater Dubuque Development Corporation, "but not Flexsteel and not Dubuque. This commitment to leave the Jackson Street site better than they found it is a gift to future generations."

This year's Big Muddy Cup, awarded to the leading metro area along the entire Mississippi River corridor in per-capita corporate facility investments like Flexsteel's, goes to Greater Dubuque, which tallied 12 projects qualifying for our Conway



Projects Database over the 18-month period that ended in December 2018. Most of those projects are from companies that identify with the community after a long time getting to know it.

New Digs, Same Roots

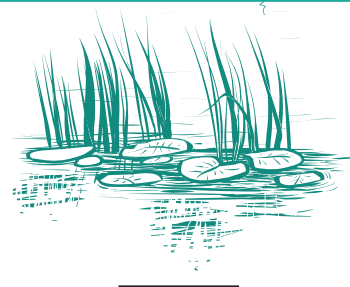
Dickinson says the former Flexsteel site goes back some 120 years.

“Brunswick made pool tables and back bars and pianos, and it used to be a roundhouse,” he says. “That project was an overnight success that began about two-and-a-half years ago, with our InfoAction business retention and expansion program. We sit down with around 300 employers

every year and use the Synchronist software from Blane, Canada to address problems or jump on opportunities. The principals shared that they were going to have to make some changes, that their production facility was aging out and inefficient. So they had to make some hard choices. That began a conversation.”

The city, county, company and state were able to assemble a deal that moved Flexsteel into a smaller, more efficient facility, while pooling some \$6 million to clean up and repurpose the old site. Flexsteel is domiciled in Dubuque, and 10 years ago also built a home office as an anchor for the refurbished waterfront. The redeveloped site on Jackson Street “will open up 43 acres on the north side, not far from our largest employer John Deere Dubuque Works,” he says.

Another growing Dubuque presence with

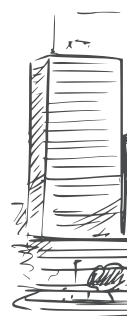


The Mississippi River flows into the Gulf of Mexico.

Photo assemblage using NASA imagery: Getty Images



THE BIG MUDDY CUP 2018 TOP METROS BY PROJECTS PER CAPITA



METRO AREA	PROJECTS PER MILLION INHABITANTS (project total)
1 Dubuque, Iowa	124 (12)
2 Blytheville, Ark.	113 (5)
3 Union City, Tenn.-Ky.	108 (4)
4 Hannibal, Mo.	102 (4)
T5 Natchez, Miss.-La.	57 (3)
T5 Baton Rouge, La.	57 (47)
T7 Davenport-Moline-Rock Island, Iowa-Ill.	44 (17)
T7 St. Louis, Mo.-Ill.	44 (122)
9 New Orleans-Metairie, La.	43 (54)
10 Clinton, Iowa	42 (2)

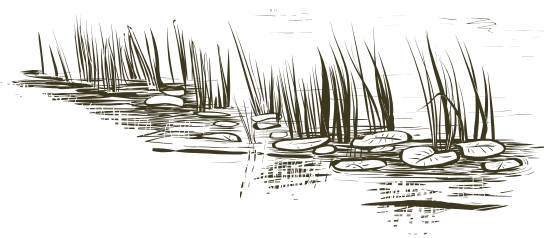
Source: Conway Projects Database

THE BIG MUDDY CUP 2018 TOP METROS BY TOTAL PROJECTS



METRO AREA	PROJECTS
1 St. Louis, Mo.-Ill.	122
2 Minneapolis-St. Paul-Bloomington, Minn.-Wis.	73
3 New Orleans-Metairie, La.	54
4 Baton Rouge, La.	47
5 Memphis, Tenn.-Miss.-Ark.	43
6 Davenport-Moline-Rock Island, Iowa-Ill.	17
7 Dubuque, Iowa	12
8 Blytheville, Ark.	5
T9 Hannibal, Mo.	4
T9 St. Cloud, Minn.	4
T9 Union City, Tenn.-Ky.	4

Source: Conway Projects Database



a slightly shorter history in town is Medline Industries, the \$9.3-billion medical device and equipment distribution company based in the Chicago area that is adding just over 100 jobs and investing nearly \$20 million in a 130,000-sq.-ft. (12,077-sq.-m.) customer support center in the city-owned Dubuque Industrial Center West.

Medline already employed more than 480 at its other Dubuque facility, which it will vacate for the new space that more than doubles its footprint, while adding employee amenities. Medline's first office in the area opened in 2000 with 25 employees, after one of the principals in the company was driving by Dubuque on the way to visit family nearby and liked what he saw.

"They are a true success story," says Dickinson. "The operations manager Renee Poppe is a star. Customer service centers in this day and age are tough to staff — some have over 100-percent turnover year to year. This facility has less than 10-percent turnover. The culture is phenomenal."

Asked about the location decision, Dmitry Dukhan, vice president of real estate for Medline Industries, tells Site Selection that "after a national search we decided to expand in Dubuque, as our team is superior and the city and region are great."

Support for the new investment includes training funds through Northeast Iowa Community College (NICC), which has a campus in Peosta, Iowa (part of the Greater Dubuque area), as well as satellite facilities in Dubuque proper. That institution is expanding its facilities as well as the range of its apprenticeship programs.

The French Connection

As it happens, a Peosta neighbor to NICC is also growing. Camso — a maker of tracked agricultural and off-road equipment formerly known as Camoplast Solideal and, since late 2018, a part of Michelin — announced it would relocate from its old

Peosta site to a new facility all the way across the street.

Camso's original location happened around the time Dickinson first came to Dubuque in 1995, and originally was focused on work for fellow Quebec company Bombardier making tracks for Skidoo snowmobiles. The place they landed in Peosta is very close to the hometown of the founder of Dubuque, French-Canadian Julien Dubuque, whose original home was not far from the original Camoplast home base in Trois-Rivieres, Quebec.

Asked if that connection was part of choosing Dubuque, Dickinson says, "We kidded about it a lot. It certainly didn't hurt. There was great chemistry between the culture of Dubuque and the company. It just seemed to be right from the beginning."

Small Town, Big Plans

Dickinson says the pillars of Greater Dubuque Development Corporation's success include such things as business retention and expansion; recruitment and marketing; Startup Dubuque and sustainable innovations, but "the most important thing we do right now is workforce solutions," including an upskilling program called Opportunity Dubuque.

The Greater Dubuque area's population is around 98,000. Reaching 100,000 by 2022 is one of the goals for one of the fastest-growing areas in Iowa, where Dickinson says median income is rising dramatically compared to the rest of the state. He wants to see the workforce grow from 60,800 today to over 64,000. But he also recognizes how far the area has come from its low point in 1984, when there was 23 percent unemployment and only around 37,000 were working in the metro area.

The difference was talented leadership, says Dickinson, as locals in the early 1990s tired of city council meetings that "looked like a precursor to the Jerry Springer Show. People stepped up and said, 'We need to bring civility to the table.' In 1993 they hired Mike Van Milligen to his first job as a city manager. He's been selected by his peers as the finest city manager in the world, and in 2018 he celebrated his 25th anniversary.

"I've just been here for the ride," says Dickinson, noting his office's location in the city's historic millwork district, part of a rejuvenated downtown not far from a rejuvenated riverfront. "And 85 percent of the growth has been from existing business. It's really an exciting time to be in this community." ▼



Rick Dickinson, President & CEO, Greater Dubuque Development Corp.



Camso and town officials gathered for some BBQ and some speeches at Camso's ribbon-cutting in Greater Dubuque in October.

Photo courtesy of Camso



Strength In DIVERSITY

Manufacturing, logistics
and internet technology
propel central Ohio's
Licking County.

by GARY DAUGHTERS

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Half an hour east of booming Columbus, Licking County has adroitly developed a humming economy through a healthy mix of established and emerging industries that most communities can only dream of.

"We are a very large land of opportunity in the Columbus marketplace," says Rick Platt, president and CEO of the Heath-Newark-Licking County Port Authority. "We accommodate some very diverse sectors," Platt tells Site Selection, "and we have communities ready and willing for companies that want a new home."

With an impressive stable of long-time manufacturing operations (Owens Corning, Boeing, Tech International, THK, Hendrickson) the energetic enclave of 175,000 people has opened the door to massive, new investments in cutting-edge fields such as e-commerce (Amazon, L Brands, Kohl's, Ascena, Harry & David) and internet technology (Google, Facebook). More than 50 of the Fortune 500 have a presence in

Licking County.

"Our biggest advantage is our cost effectiveness," says Platt. "You can have access into the Columbus marketplace of more than a million people. And yet our land values continue to be cost competitive. Our access to labor continues to be cost competitive."

Facebook Goes Big

Facebook is nearing completion of the first phase of a \$750-million data center in New Albany. Along with holding Facebook users' data, including video, the 970,000-sq.-ft. (90,115-sq.-m.) facility is expected to serve the messaging tool WhatsApp, as well as Instagram.

It's one of the largest investments in recent memory in Ohio. At full buildout, the center is expected to employ 100 full-time workers.

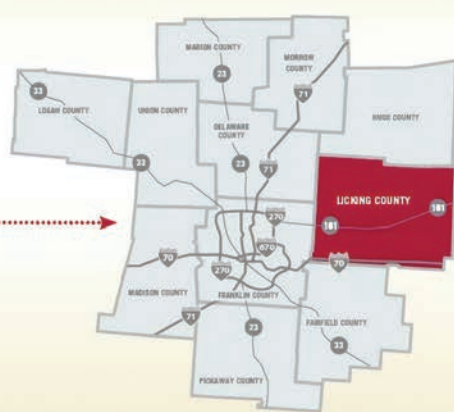
"We're thrilled to have found a home in Ohio and to embark on this exciting partnership," says Erin Egan, Facebook vice president of U.S. public

The Career and Technology Education Center of Licking County (C-TEC) can train some 650 high school students and 3,500 adults.

Photo by Joe del Tufo

PROUD TO BE A PART OF THE COLUMBUS REGION

Located just 25 minutes east of Columbus, Licking County, Ohio is a day's drive from 60% of the U.S. population and 50% of the Canadian population with access to more than 1 million regional workers.



policy. “Everything here has been as advertised, from a committed set of community partners and strong pool of talent to the opportunity to power our facility with 100 percent renewable energy.”

New Albany recently ranked as the 35th-best town to live in the country by 24/7 Wall St. Its population has grown by more than 25 percent over the past five years, far above the national growth rate of 3.9 percent. Poised at the western edge of Licking County, New Albany is well within the growing gravitational pull of Columbus and the educational juggernaut that is The Ohio State University.

“Internet technology is coming into its own in the western side of the county,” says Platt, “because they can draw in higher-level talent from the university.”

As Lauren Massie puts it, “We’re seeing Columbus come toward us.” Massie is adult education director at C-TEC, the Career and Technology Education Center of Licking County. Facebook, says Massie, already has hired graduates from C-TEC’s one-year program for network technicians.

One of Ohio’s largest career training centers, C-TEC includes facilities for up to 650 high school students and 3,500 adults. In addition to 15 traditional training programs offered to adults, the center provides customized training for more than 40 local employers. C-TEC, Massie says, has a 91 percent graduation rate to go with a 96 percent job placement rate.

“Mostly when we’re talking about customized industry training we’re talking about up-skilling in manufacturing, usually electrical or mechanical, primarily maintenance technicians,” says Massie. “But also we do recertification, such as in welding, for instance, for Hendrickson. For Owens Corning, we train their mechanical apprentices.”

What skills are most in demand?

“Advanced manufacturing, absolutely,” says

Massie. “The big transition right now is from manual equipment to automated equipment. Our ongoing challenge is to have a little bit of everything in our labs because we work with so many different employers who are at different levels of incorporating the latest and greatest technology.”

On the Move

With its central location, Licking County is within a 10-hour drive of nearly 60 percent of the U.S. population. It’s a short jaunt to Port Columbus International Airport and Rickenbacker International Airport, which features a dedicated cargo operation with direct flights to Asia and an intermodal railroad facility. The county is served by Ohio Central Railroad and the Columbus and Ohio River Railroad, both of which link to CSX Transportation and Norfolk Southern Railway.

“You can get a lot of stuff going very quickly to a lot of different areas,” says Nathan Strum, executive director of Grow Licking County Community Improvement Corporation as well as director economic development for the Licking County Chamber of Commerce.

Etna Township, which straddles Interstate 70, has established itself as a center of e-commerce and logistics. Ascena Retail Group has a massive distribution facility there that services Justice and Lane Bryant, both based in Licking County, as well as Ann Taylor, Loft and Dress Barn.

Amazon, in 2017, opened an 850,000-sq.-ft. (79,000-sq.-m.) distribution center, which employs some 3,000 workers. Doing Amazon one better, Wisconsin-based Kohl’s is planning a 1.2 million-sq.-ft. (111,500-sq.-m.), \$300 million distribution facility in the city that’s to create close to 700 jobs.

“The decision by Kohl’s,” said State Senator Jay Hottinger of Newark, “is further proof that Licking County is one of the hottest development locations in our state.” ▼

This Investment Profile was written under the auspices of Grow Licking County. For more information, please contact Nathan Strum at (740) 345-9757 or nstrum@growlickingcounty.org. On the web, go to www.growlickingcounty.org.

STRAIGHT FROM THE SOURCE:

What state manufacturing experts want you to know.



by MARK AREND

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Curious about a South Central location for your next manufacturing operation? Site Selection has done some of the leg work for you by reaching out to the directors of the National Institute of Standards and Technology's Hollings Manufacturing Extension Partnership (MEP) offices in Arkansas, Louisiana, Oklahoma and Texas for their take on the manufacturing landscape in their states. MEP Centers are located in every state, and they provide a variety of services, from innovation strategies to process improvements to many others. For more information on the nationwide MEP program, visit www.nist.gov.

We sent the same four questions to each of the four MEP representatives, and we appreciate their participating in this valuable exercise. Let's meet the participants:



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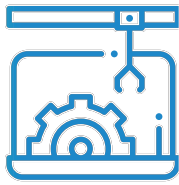
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What is the “manufacturing mood” in your state in early 2019? For example, are manufacturers optimistic/pessimistic/neutral about the year ahead?



Arkansas ranks sixth in the nation for percentage of population working in manufacturing. We’ve seen some impressive increases in existing companies adding workforce, and an increase in those companies interested in Arkansas. Governor Asa Hutchinson’s recent tax cuts have made us extremely competitive with surrounding states. So, we certainly can say Arkansas companies are optimistic, while also concerned about a new recession. And with our comparatively lower cost of doing business, we think companies are preparing for the future by paying close attention to those costs and considering what changes they can make to remain competitive.



The manufacturers are optimistic going into 2019 as the economy is picking up after a long period of recession in Louisiana. Manufacturers are beginning to look ahead to a healthier economy where oil prices are rising from \$65 per barrel this year to a forecasted \$80 per barrel in 2020. There have been large industrial announcements throughout Louisiana – particularly in the Lake Charles, Baton Rouge and New Orleans areas – ultimately leading to more jobs across the state.



After a couple of lukewarm years, state manufacturers are seeing their output expand with increasing confidence of future growth. The Oklahoma manufacturing economy is buoyed by surging petroleum activity and strong aviation-related production. There is some dismay over the effects of new tariffs, but most are supportive of regulation adjustments and have an overall positive outlook. Optimism is relatively deep as innovative manufacturers adapt to worldwide challenges and compete on a global scale.



Texas factory activity continues to expand in 2019 based on information collected in the Texas Manufacturing Outlook Survey. The general mood of manufacturers is positive, and we continue to see plans for expansion with TMAC customers. The aerospace industry continues to remain strong in the North Texas area. We are also seeing continued growth in the biotechnology sector. However, due to declining oil prices, Texas manufacturers supplying products to the oil and gas industry are feeling less confident about their business going forward.

What are the most common issues manufacturers reach out to your office about?



Workforce is a national issue and we're no different. But we're lucky: Our workers have the skills, we just need more of them. So we continue to train and look to bring more young people into the manufacturing and craftsman trades. We consistently meet with companies to find their needs and we do a great job with our higher education institutions to train for the work needed.



The most common issues manufacturers reach out to our office about are growth services, workforce training, and process improvement. Manufacturers in today's business climate are most concerned about the challenges they face related to the new trade tariffs between China and the U.S. The proposed tariffs affect \$200 billion worth of goods that affect a manufacturers' supply on a day-to-day basis, ranging from parts/assemblies to food ingredients to various materials. The 2018 Tax Reform bill approved last year has also been a hot topic where businesses have not yet seen advantages or disadvantages.



We've done a lot of work lately in preparing companies to do business with foreign customers throughout the world. That assistance is vital, especially to small manufacturers that find themselves competing globally for business.

Many of our programs focus on emerging technologies like next-generation robotics and automation, additive manufacturing, supply-chain management, predictive data modeling and digital marketing. We want our efforts to bridge the gap between technology developers, R&D organizations and private firms. Advanced manufacturing systems are now essential to even the smallest companies. Incorporating new technologies not only makes the process more efficient, it can alleviate the problem of finding enough skilled workers, which is one of the toughest challenges faced by manufacturers. High-tech equipment like collaborative robots will play an important part in reducing the worker shortage.



TMAC continues to see strong activity with request for implementing quality management systems, (ISO, AS9100, and 13485). TMAC is also highly active with the delivery of Lean Six Sigma Training across the state. TMAC is engaged in a number of transformational projects that focus strategies to help drive company profitability and sustainable growth. We have also assisted a number of companies with facilities layout and expansion.



GET THERE QUICKER FROM HERE

CRAIGHEAD TECHNOLOGY PARK
JONESBORO, ARKANSAS



Learn more at
ArkansasEDC.com/Jonesboro



Looking for a location to help your next project hit the ground running? Check out the Craighead Technology Park in Jonesboro, Arkansas. This 153-acre shovel-ready site is just off I-555 and less than an hour from Memphis, Tennessee – the nation's distribution center. The site is rail served with all utilities and infrastructure in place. Better still, Jonesboro is rich with talent and was recently named as a Competitive Community, which means it's not only a great location to build, but a fantastic place to live and work. Follow the link below, and find out just how easy it is to get up and running in Arkansas.



ArkansasEDC.com/Jonesboro

Are MEP Centers promoting any particular strategy (process improvements, green manufacturing, etc.) in 2019?



Arkansas works with manufacturers to develop customized workforce training plans to increase performance, profitability and productivity, including Toyota Kata, Lean Manufacturing, Managing for Continuous Improvement, and ExporTech. Those services are located here at the Arkansas Economic Development Commission, and when we engage with companies to bring efficiencies to help them expand, we have all of those resources under one roof.



The Louisiana MEP promotes process improvement and growth strategies. More recently, with the advent of Industry 4.0 and smart manufacturing, cybersecurity is a topic of increasing interest among the manufacturing community, and companies are starting to reach out for support to protect their businesses. Every manufacturer should be confident that their company has an acceptable level of data security to successfully combat cyber incidents. The MEP of Louisiana will continue to host cybersecurity events which outline the NIST Cybersecurity Framework: Identify, Protect, Detect, Respond and Recover.



There is increased attention toward sustainability. But it's not all solar panels and environmental footprint. Much of what we assist with is energy efficiency and waste reduction, but it goes beyond that into the areas that will truly sustain a company for the next generation. Resource efficiency and productivity go hand in hand. So too do strategic and succession planning, as well as employee development and continuing education.



TMAC has recently been promoting Smart Manufacturing and we have conducted a number of site assessments, as well as, some robotic production cell implementations. Cybersecurity is another area of TMAC focus in Texas and we have assisted a number of companies with site assessments to help them meet NIST 800-171 Compliance.



What is the most effective way to help manufacturers locate and acquire the talent they need?



AEDC is working with manufacturers and school counselors to help them recognize and identify the interests and aptitudes of students who would be great fits in manufacturing careers. Be Pro Be Proud (www.beprobeproud.org), a workforce initiative of the Arkansas State Chamber of Commerce, brings together a statewide coalition of public and private partners in education, workforce services and industry to showcase career opportunities in highly skilled professions. Future Fit is a 120-hour training program aimed at students who don't plan to enroll in a college or university, for military veterans, for unemployed or underemployed individuals, and for non-violent offenders released by law enforcement. The program is currently being piloted with plans to roll out a full-scale version to the entire state with industry-specific training for each region.



As a sponsored program of the Louisiana Community and Technical College System (LCTCS) which has a key initiative to train a successful workforce, the MEP of Louisiana works to connect manufacturers with the colleges. As a team, we analyze the needs of manufacturers, determine what areas may need improvement, and develop a plan to address those areas. Dr. Willie E. Smith, Sr., LCTCS's vice president of training & business partnerships who oversees the MEP program, stated that "the system office works with each individual community college to create relevant, timely programs and services that address specific industry needs." Through the MEP, LCTCS works with small and medium sized manufacturers every day to improve operations and adopt new technologies that can boost productivity and help manufacturers grow their businesses. In addition, they help small and medium sized manufacturers identify the root cause of challenges (including workforce) and work with them to develop a plan to prioritize and address these challenges.



The challenge of finding and retaining skilled employees remains a difficult task. In fact, it continues to be what manufacturers tell us is their No. 1 concern. We think our organization is in a unique position to more deeply involve industry leaders in solutions and build programs that will benefit Oklahoma manufacturers directly. We recently created a new position, a director of workforce development, filled by Sharon Harrison. She is pursuing innovative strategies that help cut through some of the traditional barriers facing real-world improvement. This involves more directly providing what manufacturers need now, but also preparing company leaders and next-generation workers for what will be required in the future.



TMAC can provide facility layout and equipment selection services that save time and money for businesses looking to relocate and expand. TMAC has also developed a site selection tool to better matchup company requirements with potential site location. We can also help manufacturers with their supply-chain through supplier scouting utilizing proximity sourcing leverage through the MEP network centers like TMAC to identify and pre-qualify supplier capabilities and capacities. Talent recruitment continues to be a challenge, and TMAC can work with companies to help develop training programs to better develop new hires. TMAC Metroplex recently hired a human resource specialist to help assist companies with their HR functions for onboarding and employee retention. ▼



A program focused on quality of place is yielding positive economic and wellness results in 16 small Indiana towns – with more to come.

by ADAM BRUNS

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If you've seen the inspirational film "Breaking Away," you know that the locals known as "cutters" got their name from Indiana's limestone business, which has produced stone for famous structures around the world.

You can find out all about it at the Land of Limestone Museum, housed within StoneGate Arts & Education Center (a former Indiana Limestone Co. facility) in Bedford, a town of 14,000 known as the "Limestone Capital of the World." Among other functions, StoneGate provides space to Ivy Tech Community College and Oakland City University.

The project is one of 12 pursued thanks to \$19 million in funding from the city's 2013 designation as an Indiana Stellar Community — one of 16 areas so designated since the program's inception in 2011.

"Of all the projects, that's the one I'm most passionate about," says Bedford Mayor Shawna Girgis.

Bedford projects ranged from downtown streetscaping to the movement of an historic depot to a downtown spot where it serves as a tourism center and the trailhead for a blossoming network of rails-to-trails. "That was the most out of the box," Girgis says, because it addressed

property and redevelopment as well as community health.

Catalyst for Transformation

Indiana Stellar Communities, administered by the Indiana Office of Community and Rural Affairs (OCRA), works with communities to develop their strategic community investment plans, promote local and regional partnerships and implement comprehensive solutions to challenges facing Indiana's rural communities. In a nutshell, with assistance from Ball State University's Indiana Communities Institute and Purdue University's Center for

Regional Development, the program helps nudge plans into reality.

"It's transformed the area," says Girgis.

Bedford is in a county partly served by Hoosier Energy, a generation and transmission cooperative serving 18 member electric cooperatives in central and southern Indiana and southeastern Illinois.

"Their economic development arm has been a huge asset to our community," Girgis says of working with Hoosier Energy's team over the years. "They've been great partners."

'The Opportunity to Be Themselves'

Other Stellar communities include North Vernon. Led by Kathy Ertel, Jennings County Economic Development executive director, the city was the first Stellar designee in 2011. As a result of Stellar projects, Ertel says she's noticed increased investment from property owners in their downtown businesses and residences.

"Since becoming a Stellar Community, Richmond has benefited in many ways," says Valerie Shaffer, president of the Economic Development Corporation of Wayne County. "The most visible project has been our new pocket park, Elstro Plaza, that converted an under-utilized parking lot into a central gathering place downtown that hosts a variety of events and festivals," including a weekly farmer's market that's grown 10-fold since coming to the new spot.

"Elstro Plaza also allows the growing number of workers, merchants and area residents a green space to enjoy regularly," she says. "New specialty shops on the ground floor with upstairs living for the owners is a new trend thanks to our owner-occupied housing program.

All of this has helped to attract Reid Health's back-office operation downtown, bringing over 100 workers to the area to take advantage of our new amenities."

OCRA Deputy Director Matt Crouch says Stellar is about "breaking down siloes in coming up with a community plan, and in so doing, having the opportunity to accomplish in five years what might otherwise take 15. He says the mayor of Huntingburg has told him simply getting the designation has led to firms choosing to locate there that never would have looked outside the county seat of Jasper before. Delphi, a bedroom community to Lafayette-West Lafayette, is restoring a historic theater. Princeton — home of a major Toyota plant — is improving its quality of life so fewer Toyota employees are commuting long distances.

"I think the designation in some of these smaller communities has provided them with the opportunity to be themselves," says Michael Sinnet, OCRA project manager handling the Stellar Communities program. In

other words, a blockbuster project might take the form of block-by-block rejuvenation. "Maybe it's just populating their downtown with entrepreneurs and small businesses," he says, "things that increase the quality of place."

"Since Rushville was named an Indiana Stellar Community in 2016, we have seen a true rebirth of our downtown," says John McCane, executive director, Rush County Economic & Community Development Corporation. "We are currently tracking 86 public and private projects that constitute \$91 million of investment from 2018 to 2020. Rushville is leading the way in rural Indiana, and Stellar has been the catalyst." ▼



Valerie Shaffer

Stellar Communities Program



2011:

- Greencastle: Putnam County
- North Vernon: Jennings County

2013:

- Bedford: Lawrence County
- Richmond: Wayne County

2015:

- Crawfordsville: Montgomery County
- North Liberty: St. Joseph County

2017:

- Madison: Jefferson County
- Culver: Marshall County

2012:

- Delphi: Carroll County
- Princeton: Gibson County

2014:

- Huntingburg: Dubois County
- Wabash: Wabash County

2016:

- Rushville: Rush County
- Corydon: Putnam County

2018:

- New Allen Alliance: Allen County
- Health & Heritage: Hancock County

This Investment Profile was prepared under the auspices of Hoosier Energy. For more information, visit www.hoosiersites.com, or contact Harold Gutzwiller at (812) 876-0294.



Hotel Valencia, San Jose, California
Source: Getty Images



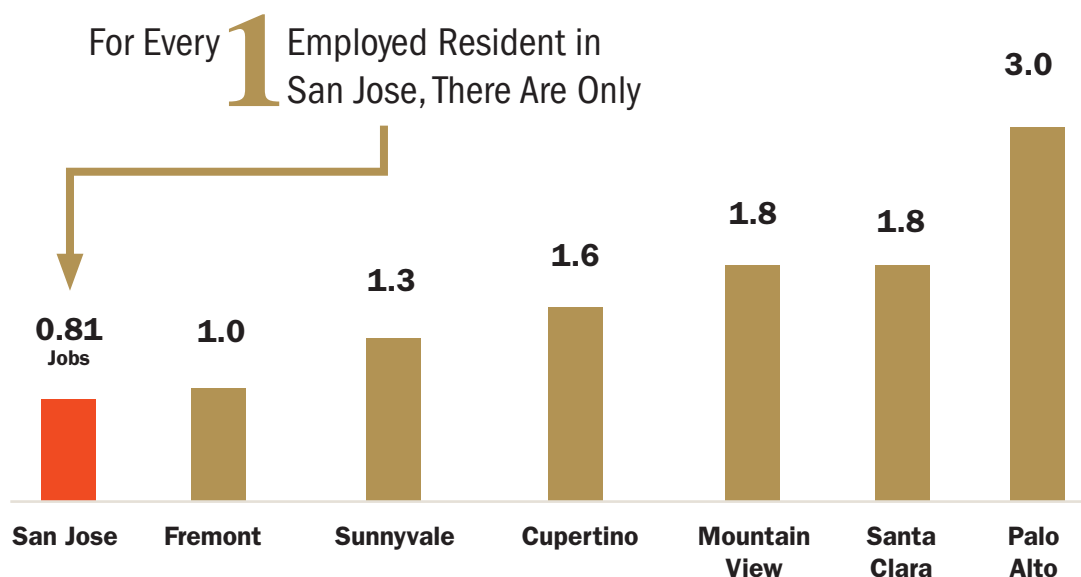
The Way to **San Jose**

**Google helps propel a city's
ambitious vision.**

by GARY DAUGHTERS
gary.daughters@siteselection.com

San Jose is both the biggest dot on the map of Silicon Valley and the Valley's neglected stepchild. While Adobe, Cisco, eBay and Paypal all have headquarters in the country's 10th-largest city, the explosive, tech-infused mojo that has created astonishing wealth and brought high-paying jobs to neighboring Mountain View, Cupertino and Palo Alto has largely eluded San Jose.

Critical Need for Jobs and Tax Base



Source: City of San Jose

“The reason tech companies haven’t gotten here is that tech didn’t start here,” says Case Swenson, a San Jose developer. Tech companies, says Swenson, “have stayed between Cupertino, where Steve Jobs started, and San Francisco, which is where the money is. They haven’t made it this far south.”

With a population of some 1.4 million people, San Jose is known as the Valley’s bedroom community, the provider of housing for tech workers who clog the outbound roads each morning on their ways to work elsewhere. Up to 70 percent of employed residents leave San Jose each day, says Bob Staedler of Silicon Valley Synergy, a land-use and government relations company. More than half of the people who work at Apple’s “Ring” commute to Cupertino from San Jose, which currently sits at a ratio of 0.81 jobs per employed resident. A recent city planning document states:

“San Jose is very fiscally constrained and will be so for the foreseeable future. An underlying reason is that San Jose has an imbalanced structure — it has a very large resident

population/housing base relative to its small job/workplace base.”

Small wonder, then, that San Jose is agog over Google. After nearly two years of discussion, the search engine giant from Mountain View appears ready to pull the trigger on a massive, mixed-use corporate campus that could create up to 20,000 jobs, an eye-popping 65-percent increase in San Jose’s downtown workforce. The complex would be Google’s largest in the world. Google plans to house thousands of workers within the development.

‘The Place Where They Can Grow’

Under a Memorandum of Understanding approved unanimously in December by San Jose’s city council, Google recently paid \$111 million in exchange for more than a dozen downtown parcels covering 11 acres (4.4 hectares) toward the tech giant’s plan to build a 50-acre (20-hectare) transit-oriented development of offices, shops and restaurants. Google envisions a campus of up to 8 million sq. ft. (743,224 sq. m.). In all, the company has purchased some 51 parcels of largely

STOCKTON, CALIFORNIA

50%

Some College or Higher



311,285

Total Population

138,369

Labor Force



32

Median Age

10.6M



Available SF Industrial

798K



Available SF Office



Stockton
Metropolitan
Airport



Import and
Export at **Port**
of Stockton



Rail access
through UP
and BNSF

WITH A POPULATION OF OVER 300,000, **STOCKTON IS THE 13TH LARGEST CITY IN CALIFORNIA** and is rapidly becoming an

integral part of the San Francisco Bay Area economy. Stockton's logistic position makes it ideal for swift and cost-effective manufacturing and distribution of goods to major West Coast markets. The City of Stockton is committed to maintaining a business-friendly atmosphere and will work to expedite your business project. We provide a one-stop-shop permitting, inspection and plan review service that enhances customer service and streamlines permit processing for all types of development. Stockton possesses the business climate, workforce, infrastructure and quality of life that make it an ideal place to do business. Let the City's professional Economic Development staff help you on your business venture and show you the true Stockton Advantage.

Come to Stockton and
Experience Our Advantage!





Rotterdam Central Station (above) “is probably the best model for what we want to do here,” says Kim Walesh, San Jose’s deputy city manager and director of economic development.

Photo by Jannes Linders/Bentham Crowell Architects

underused property and now controls a swath roughly a half-mile long.

The city hopes that, in addition to creating tens of thousands of new jobs, the Google development will generate the downtown buzz that San Jose craves, as well as millions of dollars in needed tax revenues for underfunded city services.

“Google,” says Swenson, CEO of his eponymous development company, “is absolutely some of the best news we’ve had since Adobe coming to town in the ‘90s. It’s creating a huge amount of excitement.”

City officials, developers and real estate analysts cite several factors that have coalesced to make San Jose increasingly attractive to tech firms traditionally ensconced in Silicon Valley’s smaller enclaves.

“There’s a need for space in the Valley that’s getting tighter and tighter,” says Nick Goddard, senior vice president of Colliers International. “The freeways pointing north out of San Jose are packed in the morning, and pointing south they’re packed in the evening. Employers,” he says, “are losing hundreds of millions of dollars of productivity per year, and they realize that traffic is only going to get worse.”

Developer Joshua Burroughs believes that San Jose’s relative abundance of available property has begun to tip the balance in its favor.

“All those peninsula cities have had an outrageous amount of growth the last decade, and they don’t have the infrastructure to add any more capacity,” says Burroughs, COO and senior vice president of development at Urban Catalyst, a newly launched investment fund supporting local Opportunity Zones. “San Jose is the place where they can grow.”

Employers, says Burroughs, “are getting pushed out of peninsula cities and they’re realizing that most of their employees live in San Jose and don’t want to commute anymore.”

To that extent, Burroughs cites the lifestyle preferences of the Valley’s millennial workforce as working in San Jose’s favor.

“Most of Silicon Valley,” he says, “is suburban. San Jose, particularly downtown, is an urban center. And when you look at the millennial workforce population, which is larger than baby boomers, that’s there they want to be. They want to be able to walk to work. They want walkable access to restaurants, events, cultural interactions and things like that. That’s what the San Jose opportunity is.”

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"The Graduate" is geared toward students at San Jose State University.
Source: Swenson



The Right Moment Arrives

Burroughs agrees with local officials that the opportunity didn't emerge from a vacuum, but rather is the result of years of strategic planning aimed at establishing downtown San Jose as a commercial and social center.

"There was a three-decade period when San Jose built up a bunch of infrastructure," Burroughs says. "So, we now have the capacity to grow. We feel it's ready for a turning point. We are reaping the benefits of the seeds that have been planted over the last 30 or 40 years."

Underground fiber-optic cable went in, as did upgraded water and sewer infrastructure. The city established the basis of a regional transit hub with light rail, Amtrak, Caltrain and ACE Train (Altamont Corridor Express) all converging on downtown's Diridon Station. SAP Center, which recently celebrated its 25th anniversary, became home to the NHL's San Jose Sharks. Under a vision to create a downtown focal point, the city assembled tracts of land for a Major League Baseball stadium, a plan that fell through when the American League's A's couldn't be pried away from Oakland. Still, the decision to purchase the downtown land proved prescient when Google came in and

scooped it up.

"We knew that buying that property long-term was going to be good for the city, whether for a ballpark or something else," says Staedler. "As the old joke goes, luck is what happens when preparation meets opportunity."

The elemental lure for Google is San Jose's effort to re-invent Diridon Station as a bustling, regional transit center. The \$10-billion Diridon Station Area Plan, adopted in 2014, envisions the station connecting seven rail lines, which, in addition to Amtrak and Caltrain and ACE, would include high-speed rail, VTA (Santa Clara Valley Transportation Authority), and BART (Bay Area Rapid Transit). The arrival of a BART line to San Jose, expected by 2026, is to complete a rail loop around San Francisco Bay.

Kim Walesh, deputy city manager and director of economic development, tells Site Selection that Bentheim Crouwel, a renowned Dutch design firm, has been hired for the Diridon project. She says ridership through the terminal is projected to increase eight-fold by 2040 to 140,000 passengers a day, on par with the current volume of San Francisco International Airport.

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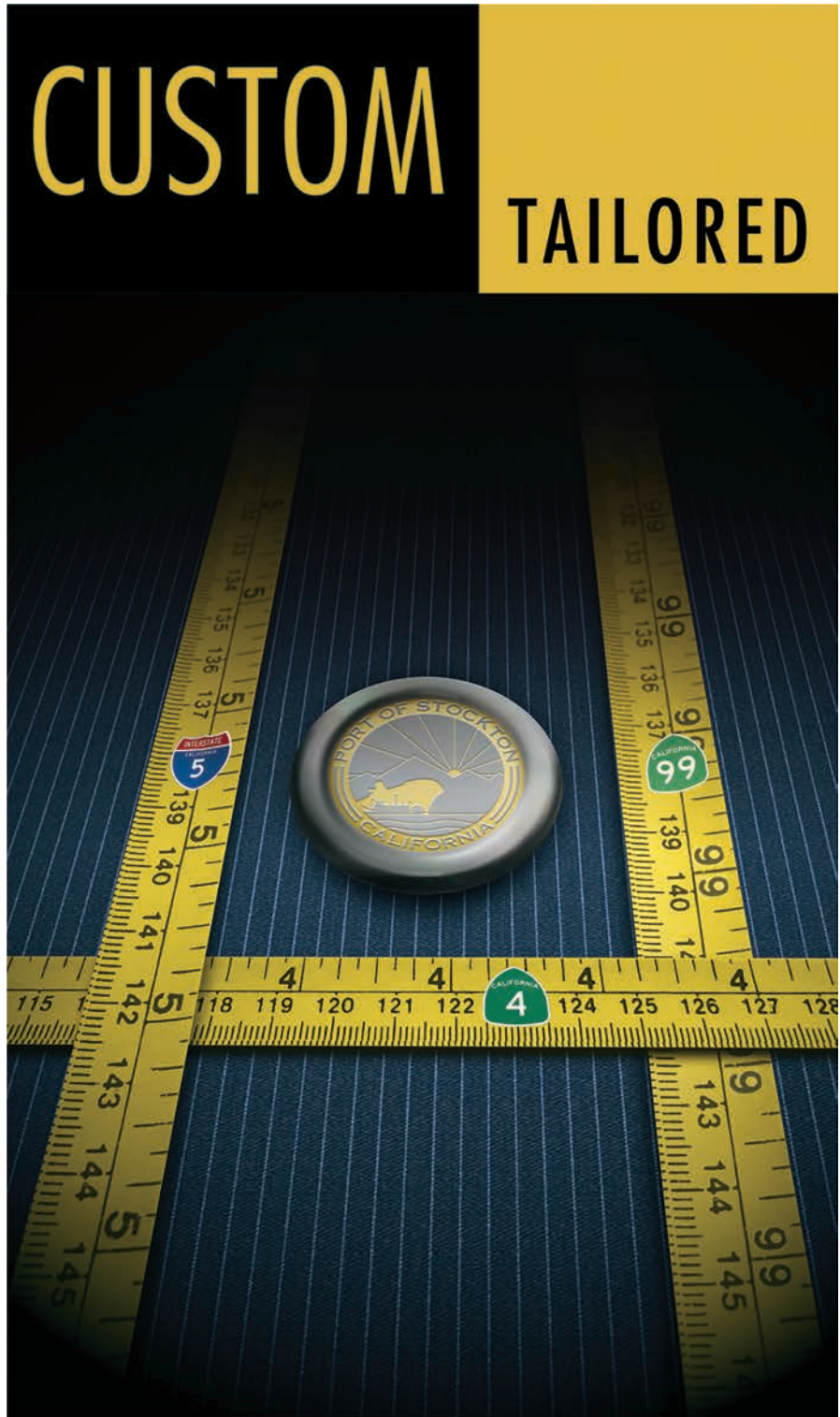
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absolutely
some of the
best news
we've had..."**

— Case Swenson, CEO, Swenson

"This will be on the order of what you'd see in Europe, a major intermodal station," says Walesh. "Bentham Crowel has done some of the most significant multi-modal stations in Europe, including Rotterdam Central Station, which is probably the best model for what we want to do here. We see it as a major destination in its own right, not just a pass-through station."

A study commissioned by the city, released in November, predicted that the Google transit-oriented village would add 8.5 million sq. ft. (789,676 sq. m.) of prime downtown office space, an increase of roughly 85 percent.

"We're making some pretty




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big decisions right now that have implications for private development and the public space,” says Welsh. “We want to maximize the station, the transit, the urban fabric and the private development that happens around it.”

By July, says Welsh, planners expect to determine the orientation of the station, alignment of the rail system, parking for cars and bicycles, bus access, and how the new station might mesh with the areas around it.

Google’s entry into the equation adds flesh to the bone of the city’s ambitious vision, and local authorities expect the company to be involved in

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Tejon Ranch leads the way as Kern County develops into California’s next major logistics hub

Located just north of Los Angeles at the geographic and population center of California, Kern County is quickly becoming a major location for distribution centers. 50 distribution or fulfillment centers are located within 40 miles of the county seat of Bakersfield — California’s ninth largest city. With a lineup of distribution centers including Amazon, Dollar General, Famous Footwear, IKEA, L’Oréal, Ross, Target, and Wal Mart, Kern County is increasingly popular with site selectors.

Advantages of Kern County

There are many reasons why companies looking to move or expand in California are targeting Kern County.

Kern County’s location enables overnight delivery to 40 million consumers — more than any other location in the west. Distribution centers are cost centers for companies, and the costs of doing business in Kern County are much lower than most other regions in California. Housing in Kern County is also among the most affordable in the state, enabling companies to attract and retain employees.

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At the forefront of this growth is the Tejon Ranch Commerce Center (TRCC). Located directly on I-5 at the southern gateway to Kern County, TRCC offers fully-entitled land, more than 5 million square feet of existing distribution and retail space, as well as capacity for immediate development of 15 million additional square feet of warehouse and industrial space. TRCC provides next-day delivery service to Southern and Northern

California, Reno, Las Vegas, and the outskirts of Phoenix along with access to up to 6.7 million more consumers than competing regions — all within a single-day truck turn. TRCC features shovel-ready industrial sites for distribution, manufacturing, and e-commerce operations serving all of California and the 11 western states.

Its biggest advantage? TRCC is the closest location in Kern County to the Ports of Los Angeles/Long Beach and given its proximity to the LA basin, it is the most immediate relief valve for companies priced or spaced out of heavily constrained Southern California. For example, L’Oréal USA recently moved its professional salon distribution operations to TRCC from Valencia, California. The reason for their move from Los Angeles? TRCC offered greater value, room to grow, a deep and qualified employee base and a strategic location from which to serve the western US.

The County of Kern recently created an aggressive economic incentive policy, with flexibility to craft significant tax incentive packages to attract new businesses. In 2018, a \$2.3 million incentive package was awarded to L’Oréal, based on its creation of 155 new jobs at TRCC. Amazon, which is building a 2-million square foot multi-story facility in Kern County next to the airport, also received an incentive package tied to additional job creation.

Growth in Kern County and at Tejon Ranch continues. Tejon, in partnership with Majestic Realty Co., is building a 580K SF speculative industrial building that will be ready for occupancy in the fourth quarter of 2019. With its lower costs, new economic incentives, great amenities for workers and professional drivers alike, California’s largest activated Foreign Trade Zone, and substantial room for growth, TRCC will continue to lead the way as companies discover the advantages of locating in Kern County.

For more information, visit www.tejoncommerce.com.

the design of the station and its surrounding footprint.

"We had always envisioned that there would be a master developer," says Welsh. "We didn't want to have piecemeal development, so we were delighted when Google saw the potential to expand downtown."

The high-speed rail component of the Diridon plan was cast into confusion in February, when California's new governor Gavin Newsom appeared to scale back the \$77-billion state-wide project, including a San Francisco-to-Los Angeles connection that would pass through San Jose.

"Let's be real," the governor told a joint session of the California



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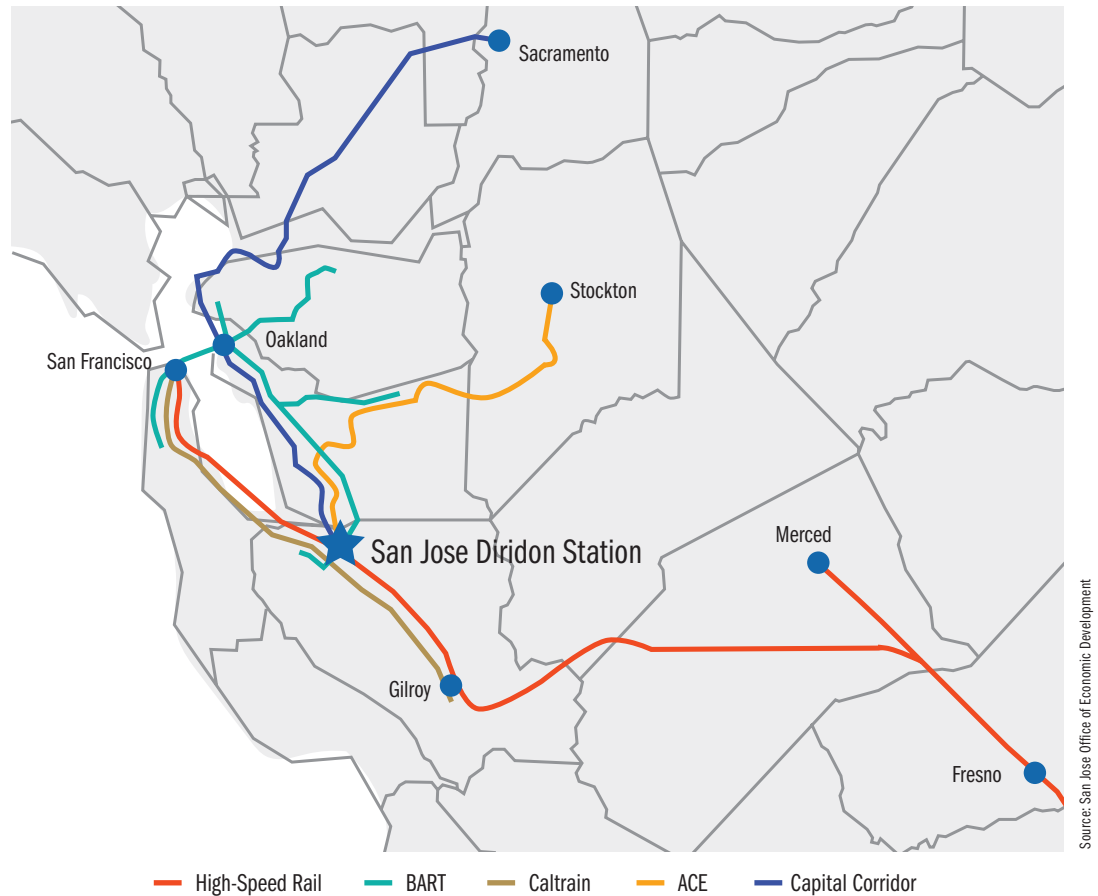
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Bay Area Metro Rail Options



legislature. “The current project, as planned, would cost too much and, respectfully, take too long.” Newsom declared that “there simply isn’t a path” to get from San Francisco to L.A.

Clouding the situation, Newsom added that he’ll continue to back “bookend” projects intended to bolster commuter rail lines in the Bay Area, which could eventually carry high-speed trains.

Elisabeth Handler, public information officer for San Jose’s Office of Economic Development, tells Site Selection that the planned multi-modal transit station “will become a reality” either way.

“We are proceeding with our work on high-speed rail, discussing San Jose’s proposed options with California High Speed Rail and supporting their outreach in our community. The Diridon Integrated Station Concept Plan,” Handler writes in an email, “is continuing with its work to plan a transit hub that provides a seamless experience for riders, while integrating into the fabric of the distinct neighborhoods that surround it.”

The Anti-Amazon

Google will benefit hugely from San Jose’s 11-figure investment in Diridon Station. But Mayor Sam Liccardo wants everyone to know that negotiations with Google bear nothing in common with Amazon’s search for new headquarters cities, through which the company openly solicited incentives including “land, site preparation, tax credits/exemptions, relocation grants, workforce grants, utility incentives/grants, permitting and fee reductions.”

Liccardo, in a Medium post dated November 28, declared that:

“Google will pay full freight for land, taxes, fees and additional community benefits ... in stark contrast to other cities handing out billions in local tax dollars to attract big companies. We offered Google no subsidies, and they didn’t ask for them.”

Further:

“Whether it’s the tens-of-thousands of new jobs available to our residents, the roughly \$10 million in net annual City revenues available to enhance public services, or the community benefits that Google has committed to provide ... San Jose residents have much to gain if this project ultimately comes to fruition.”

center is likely to increase the value of the land surrounding it exponentially, including the property Google purchased.

Google, says Welsh, has begun to develop a master plan for its 50 acres, which the city must approve. At the same time, the city is to revise its original Diridon Station Area Plan, whose anchor was the ballpark that never came to fruition. In

Google is *very interested* in social equity...”

— Kim Welsh, Deputy City Manager, City of San Jose



Liccardo says that for the land it has purchased, Google paid \$237.50 per sq. ft., two-and-a-half times what neighboring properties appraised for in 2017. Even so, it’s well below what Google paid as part of its recent \$1-billion office park purchase in Mountain View. The Diridon transit

contrast to Amazon, officials say, Google will pay its way in.

“Once we know what the project is,” Welsh says, “we will start negotiating with Google the development agreement, which will include the amount and a general spending plan for a

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community benefits contribution from Google to the city. We will have a process of understanding the increase in the value of the Google properties, and we'll calculate and negotiate an amount that Google will pay to the city."

benefit from this development.

"What Google is really about," she says, "is placemaking and working with the city to balance these different interests, whether it's sustainability, social equity or fiscal feasibility."



There is a pipeline of projects in the hopper in downtown San Jose, and it's a lot."

— Joshua Burroughs, COO, Urban Catalyst

The Google money, Welsh says, will go toward public improvement projects such as affordable housing, parks and public places, job training and education. Under a city council edict, 25 percent of new housing in the Diridon area is to be classified as affordable.

"Google is very interested," Welsh says, "in social equity and what we can do together to make sure that local people and local place

All of that comes together in a mixed-use development that is right at this massively expanding intermodal station and transit service. There's a lot of interest in getting this right."

Riding the Google Effect

Whether by coincidence or otherwise, the talk about Google landing in San Jose, which surfaced in June of 2017, has coincided with a surge of

Sometimes the address says it all.



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Within weeks of Google's initial announcement, Adobe announced that it would expand its massive San Jose headquarters by adding a fourth office tower 18 stories high, which would allow the company to more than double its downtown workforce from 2,500 employees to around 5,500. Adobe was one of the first major tech companies to locate in the city, having erected downtown towers in 1996, 1998 and 2003.

"We are doubling down on San Jose," said Jonathan Francom, Adobe's vice president of employee and workplace solutions.

Citing a survey of city planning documents, the Mercury News reported in February that proposed downtown office space climbed from zero in 2016 to more than 1 million sq. ft. (92,903 sq. m.) in 2017 and 4.3 million sq. ft. (400,000 sq. m.) in 2018. The paper reported similar jumps in proposed hotel rooms, housing units and retail.

"There is a pipeline of projects in the hopper

in downtown San Jose, and it's a lot," says Joshua Burroughs. "And it's separate from Google. It's millions of square feet of office proposed, tens of thousands of residential units, hundreds of thousands of square feet of retail."

In January, Boston Properties, one of the country's largest publicly traded developers, owners and managers of Class A office properties, announced a partnership with an affiliate of San Francisco-based TMG partners to co-develop a 1.1-million-sq.-ft. (102,193-sq.-m.) urban campus near Diridon Station. Boston Properties says the planned three-building campus, named Platform 16 and designed by Kohn Pederson Fox Associates, is to feature 15-foot floor-to-floor heights, more than a dozen large outdoor terraces and outdoor workspaces, as well as fitness and wellness facilities and a conference center.

"The area near Diridon Station has become one of the region's most prominent locations," said Boston Properties in a statement.

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Boston Properties says it expects to begin demolition and site preparation this spring, break ground in summer, and potentially complete the project as early as 2021.

"The planned development," says Mayor Liccardo, "will help bring thousands of jobs into our city center with easy access to public transit and include a number of public space improvements that will help connect the Guadalupe River Park to Platform 16 and the rest of the Diridon Station area."

Just east of the station, Swenson has broken ground on a 260-room residential high rise conceived as an off-campus housing project for students at San Jose State University. Named "The Graduate," the project is to consist of a 19-story, L-shaped building with more

than 1,000 beds and student-oriented amenities including an exercise center, swimming pool, sports courts and picnic areas, with retail space on the first floor.

Swenson points out that, as the project is under construction, much of San Jose's frenzy of proposed development remains on the drawing boards.

"As far as people that are actually pulling permits and building, it hasn't really been happening," he says. "I love the energy in what's going on around San Jose. As far as a boom, I don't think we're there yet. I think we've got a good shot at a boom when BART comes to town and when Google comes to town."

"If both of those things happen," he says, "sometime around 2025 or 2026, then the boom will be official." ▼



Escalon is located in California's Central Valley, it is an attractive city of 7,558 persons in a productive area of San Joaquin County. The city is surrounded on all sides by scenic agricultural land and open spaces. Escalon continues to foster its goal of maintaining a vibrant and diversified local economy. The City's mission statement of "Taking pride in our community through quality service" is apparent through the aggressive policies adopted in pursuit of expansion of local business as well as encouraging attraction of new employment generating industries. Escalon boasts a low crime rate, an award-winning school district, quality residential homes and a quaint, 1920's era downtown.

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New Governor, New Agenda

But no less of a focus on being the top state business climate. Watch for information technology to play a critical role in boosting rural Georgia — and the state's reputation as a business location worldwide.

by MARK AREND

mark.arend@siteselection.com

Georgia's 83rd governor, Brian P. Kemp, was sworn into office on January 14th at Georgia Tech's McCamish Pavilion, a location that likely raised some eyebrows among his fellow University of Georgia graduates. They needn't fret. Among other topics, Governor Kemp told Site Selection Editor in Chief Mark Arend in an interview just two weeks after his inauguration that he has big plans for his alma mater, including making it the top agriculture school in the nation. It doesn't have far to go — UGA is currently ranked the third best agricultural school in the nation by Pittsburgh-based Niche, which ranks schools, neighborhoods and companies.

The new governor, who had served previously as the Peach State's Secretary of State since 2010 and in the state Senate prior to that, is well aware of Georgia's status as the top U.S. state business climate for six consecutive years, according to this publication. How he plans to maintain and build on that legacy was the focus of the late January interview, highlights of which appear here. A renewed focus on rural Georgia will play a prominent role.

“If people take the position that they need to boycott us, then I’ll take the position that they need to boycott Florida and Tennessee and Alabama and South Carolina.”

What are your plans for building on Georgia's record as being the best state for business for the past six years?

Governor Kemp: I have a little different perspective than Governor Deal, not that I don't have the same goals and objectives that he had with our economy and where we are in our state. I give him a lot of accolades — and to Governor Perdue as well. He had to govern during some very tough times with the recession and keeping our triple A bond rating and positioning our state to do well after the recession. I went to 12 of the 13 regional meetings as part of Governor Deal's original competitiveness initiative — we had all run on jobs and economic development.

I've been in the private sector over 30 years — I've been the one signing the checks. I'm still doing that today. I've been a small business guy, and I see my role as building from where we are and to take us to the next level, continuing to be the best

state for business. But I also want to make us the best state for small business. In our state, there are a lot of areas where small business people are still struggling. People are moving away and there aren't a lot of customers, in rural Georgia.

I campaigned on Putting Georgians First and said the first day I was in office that would be the first thing I did. It was my first executive order — creating that committee. We will be naming the members soon. It will be geographically diverse — people from all over the state that will bring all dynamics of our economy, whether it's true small business or big corporations. We're working on what we will charge them with now. How do we be number one for small business, how do we measure that, and what do we need to do? There will be other things, but they will look at reducing regulations, streamlining operations for state government, how we make our state more competitive in areas we may not be right now, and looking at our tax structure.

The good thing for us in terms of taxes is if we can just get the economy to hang on, I'm planning on lowering the state income tax again. That is in the pipeline to do. It's one reason we did the teacher pay raise this year, to get the bulk of that behind us so it would free us up to cut taxes again. The economy will dictate a lot of that.

Are there other initiatives you are eager to get working on as your administration gets under way?

Governor Kemp: In terms of technology, something I'm considering in addition to the Putting Georgians First committee is to have an Information Technology Advisory committee. We can compete with anybody in IT. Think about Columbus and Atlanta in terms of fintech, Atlanta and other areas with health-care IT, and we're now a major player in cyber with the Georgia Cyber Center in Augusta and Fort Gordon [home of the U.S. Army Cyber Center of Excellence]. We're working on how to keep fostering that cyber environment. I have a lot of

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experience in that, being in the Secretary of State's office, with protecting our systems and the whole debate around critical infrastructure, the federal government and what that entails. We did a complete private-sector model restructuring of our IT department. The value of the Cyber Center in Augusta and the mission at the base are huge. I envision it being like the port is to Savannah — it serves the rest of the state as an economic driver, and I think Fort Gordon and Augusta will do that.

What happens if and when RFRA (Religious Freedom Restoration Act) legislation comes before you, and pressure builds to veto it from those with planned or existing operations in the state?

Governor Kemp: I don't think the threats are as great as the press makes them out to be. I have

been very clear on my position, which was the same position Governor Deal took when he campaigned, which was to support the federal language. The problem was the legislature passed their bill with more than that in it, and he vetoed it. I would do the same. If it's more or less, I would veto it. What I would support and sign would be word for word what's in the federal statute. About 31 other states have that same language — every single state around us does. It has nothing to do with the North Carolina bathroom deal. We're not going to have a bathroom bill here. We believe that if our business people and our local schools have that issue, they can deal with that. I've been clear on that and have been saying that for a long time. Most people here — people in the film industry I've talked with and people in California threaten to boycott and what not, but the people here

(Continued on page 154)

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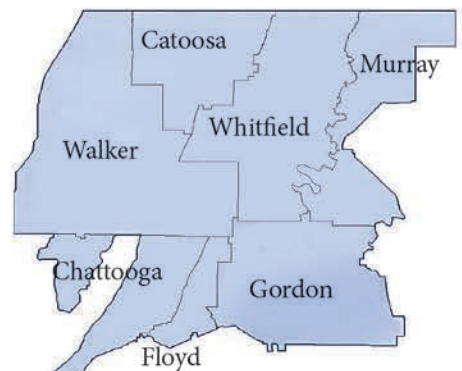
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At the Georgia Foreign Trade Conference in early February, Georgia Ports Authority Executive Director Griff Lynch unveiled GPA's Big Berth/Big Ship program that will allow the Port of Savannah to simultaneously handle six 14,000-TEU vessels by 2024.

"No other single container terminal in North America has the ability to expand berth capacity at this rate," said Lynch. Currently, Savannah's Garden City Terminal is equipped to handle two of these vessels, and by April of this year that number will increase to three.

During his presentation titled "2019: The Triple Crown?" Lynch told an audience of 350 logistics professionals that the Port of Savannah had just achieved the busiest month ever in its history, moving 433,975 TEUs, a whopping 28-percent jump over the previous year.

"A strong global economy coupled with a growing awareness of Savannah's logistical advantages are driving sustained growth at our deepwater container terminal," GPA Board Chairman Jimmy Allgood said. "GPA's Big Berth/Big Ship program will ensure Georgia stays ahead

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of demand and ahead of the competition.”

Over the next five years, the Authority plans to add another 21 Neo-Panamax ship-to-shore cranes, replacing 14 of its older models to bring the total fleet to 37. Dock upgrades are already under way to support the new, larger machines.

Industrial Space Demand Spikes

The Savannah market is also seeing significant private development. Over the past 24 months, private investors have added 9 million sq. ft. (836,100 sq. m.) to bring Savannah’s total industrial real estate market to 60.6 million sq. ft. (5.6 million sq. m.). The rate of construction has since accelerated, with another 9.2 million sq. ft. (855,000 sq. m.) of industrial space now under construction.

“The Savannah market outpaces its peer group for warehouse demand. One of Savannah’s strong suits is that within a 30-mile radius from Gate 4 there is still a real deep inventory of industrial sites and parks that have very effective access to and from Garden City Terminal,”

said Blaine Kelley, senior vice president in the global supply chain practice of industrial real estate firm CBRE. “Not surprisingly, it really all starts with the ports infrastructure, the access to global markets, the capacity for long-term growth, and the proximity to the immediate and regional customer base.”

In addition to the ship-to-shore cranes GPA is adding, a dozen new rubber-tired gantry cranes will bring the number of Garden City Terminal’s container handling cranes to 158. Ten RTGs will be commissioned in July, another two in September. Phase I of the Mason Mega Rail project will be complete in October 2019. Full completion a year later will double the Port of Savannah’s rail lift capacity to 1 million containers per year.

In late 2021, the Savannah Harbor Expansion Project is slated for completion, delivering the deeper water necessary to better accommodate the larger vessels now calling on the U.S. East Coast.



Photo courtesy of Georgia Ports Authority



Photo by Mark Arend



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MASON MEGARAIL

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OPERATIONAL IN

2020

DOUBLES GPA RAIL CAPACITY TO

1 MILLION CONTAINER LIFTS PER YEAR

EXTENDS REACH TO AMERICAN MIDWEST

CUTS TRANSIT TIMES BY 24 HOURS

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(Continued from page 148)

taking advantage of the film tax credit don't want to deal with the political heat, but they're not leaving. I'm very pragmatic about this issue. I'm not out there beating a drum. If people take the position that they need to boycott us, then I'll take the position that they need to boycott Florida and Tennessee and Alabama and South Carolina.

We've talked about the importance of being the best state for small businesses. What should readers know about your interest in the large projects, the ones that create hundreds or thousands of jobs with one project?



“Sometimes people take my passion for small business to mean that I’m not going to be focused on getting the Norfolk Southern or NCRs or Porsches of the world. That is absolutely not the case.”

Governor Kemp: Sometimes people take my passion for small business to mean that I’m not going to be focused on getting the Norfolk Southern or NCRs or Porsches of the world. That is absolutely not the case. I was with Governor Deal recently when he announced the great news in Jackson County with lithium-ion battery maker SK Innovation coming, which will be huge [\$1.67 billion investment, 2,000+ jobs]. I am a big fan of that. I would like to see more of that spread out around the state. But I am a realist too — there are a lot of reasons people want to be in Atlanta. It has a lot of bandwidth, especially with things going on around the airport. There are great opportunities in south Atlanta, but we have to work on fixing the schools there.

Being a business man, I’m very comfortable sitting in a board room

talking to CEOs. I was invited by the Serta-Simmons CEO to come to the ribbon-cutting ceremony for Serta’s 500 jobs and new headquarters at the old GM site in Doraville. I’ll continue to do what Governor Deal has done and go after those folks. People are coming to the Southeast because we have a good business environment. We may not get every one of them, but we will get our share, and it makes us all compete. I hope other states keep overregulating and overtaxing. It will be great for us, not only regarding companies in the United States, but foreign businesses. We have a great economic development team at GDED. I’m definitely going to put my

stamp on that and focus on rural Georgia and how to grow jobs and investment there. I won’t be upsetting the applecart there — that team is as good as anywhere in the country. I’m looking forward to continuing to be a governor that has, like former governors, focus on bringing bigger companies here.

One of the things I want to do with the economic strike team I talked about during the campaign is do a better job of figuring out what our assets are around the state and how to sell those. This means putting together a team at GDED that will focus solely on rural Georgia, to work with the economic developers in these counties to identify assets.

Another part of the Putting Georgians First initiative is how to focus on existing industries. GDED does that, and I want to learn more about that. We do very little



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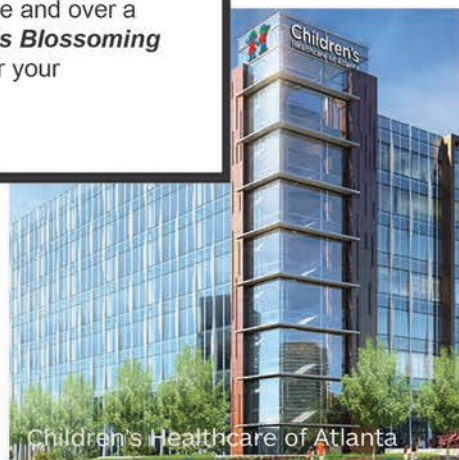
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in the way of incentives for people to grow, and it would grow jobs in places where we need them.

A new governor means a new approach to important state issues, such as workforce development. What are your thoughts on that important area?

Governor Kemp: We have to keep working on that. Governor Deal was very focused on that, and I will continue to do so. I also want to make the University of Georgia the number one ag school in the country. That is by far our biggest industry in the state. We have great opportunity there when you think about the world's food supply needing to double in the next 30 years. As tough as it is in the ag economy with commodity prices being down, there is a big upside. There are only so many

places you can grow crops, and we're one of them. We have the talent here, the university, brain power from the research institutions, and we have the synergy with fintech, health-care IT and now cyber to be a leader in ag tech.

Between that and those other sectors, that will help us solve some of our labor problems down the road when you think about autonomous farm vehicles and other systems on the farm, like irrigation—anything technology-driven, I think we need to be a leader in the world in ag tech. We won't get people to pick Vidalia onions 10 or 15 years from now with the immigration problem we have. Our factory workers — when you're trying to compete with low-wage countries, you have to use technology to do that. When you have a tight labor supply, you have to offset it with technology. Then we have to retool

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LAWRENCEVILLE SOUTH LAWN



Developed by George Berkow Inc., in joint venture with Navare Group, this \$200 million, public/private, mixed-use, urban-style development in downtown Lawrenceville will feature 600 residential living units and more than 15,000 sq-ft of retail space.

To view more projects under development in Gwinnett County, visit PartnershipGwinnett.com



the labor force to be able to work on the equipment or run or build the equipment to prepare our workforce for the jobs of tomorrow. All of that together, we can be as good as anybody in the country. That's how I see us staying in the position we are in.

What do you see as your role in business recruitment?

Governor Kemp: I will be a governor that's not afraid to go the West Coast or Boston and say, "You need to be investing more in Georgia." They're already investing here a lot. We have a low cost of doing business, a talented workforce — there are a lot of reasons to be here. Maybe we can't lure a Silicon Valley or Boston business to Georgia, but there are a lot of businesses they could start or invest in

here that would be here a long time. Some of them may not. We don't need to be afraid of that, and we need to go and sell it to them. I've been thinking about putting this IT advisory committee together in addition to the Putting Georgians First committee. We can get someone from Columbus involved in fintech, Atlanta fintech and health-care IT, people that were early in the startup world here, people in the private equity venture capital world, people in Augusta in cyber and the business community, somebody in ag tech, to create not a big group but a diverse group. These committees will give us a good road map on how we keep being competitive and stay at the top of the pack. It's important for us to have an international brand, and we're a great state to have it, certainly with the airport and the seaport. But we can build off that. ▼

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Is Minnesota Making the Grade?



A new report highlights progress, challenges.

by GARY DAUGHTERS
gary.daughters@siteselection.com

Anchored by a workforce considered one of the best-educated in the country, Minnesota has given birth to numerous local businesses that have grown to crack the Fortune 500. General Mills, 3M, Target, Cargill, Medtronic, Hormel and CHS all are global brands made in Minnesota.

“We’re really proud of that ability to start and grow businesses here in Minnesota,” says Doug Loon, president of the Minnesota Chamber of Commerce. “That’s been the sustaining reality of our economy.”

For the fourth year running, the Minnesota Chamber recently released its “Minnesota Business Benchmarks” report, a comparative overview of the state’s business climate based on metrics such as overall health of the economy, taxes, innovation, infrastructure, workforce and cost of doing business.

Among the key findings for 2019:

- Innovation remains a strength of Minnesota's homegrown economy, ranked fourth in the nation for patents per capita;
- Minnesota has witnessed a slight improvement in tax rankings, but still ranks among the five highest-taxed states for both corporate and individual taxes;
- The state faces a labor shortage expected to hit 239,000 by 2022.

- Minnesota's economy is growing, but at a slower pace compared with many other states.

According to the Benchmarks report, Minnesota's 1.9 percent GDP growth in 2017 trailed the national average of 2.1 percent, placing it 23rd among the states for economic growth. Lagging industries included mining, quarrying, natural gas extraction and information services. Others — including education, wholesale trade, health care and social services — saw larger-than-average gains.

(continued on page 164)



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State Backs Graco Expansion

Graco, a leading manufacturer of fluid handling equipment, plans to more than double the size of its David A. Koch Center facility in Rogers, 25 miles (40 km.) northwest of Minneapolis. Graco says the project will add 480,000 sq. ft. (44,593 sq. m.) to the existing 316,000-sq.-ft. (29,357-sq.-m.) manufacturing, office and product development facility.

The \$73-million project is to create 84 new jobs over four years. Graco's Koch Center facility currently employs about 450 people.

"To say the City of Rogers is excited for the Graco expansion is an understatement," said Mayor Rick Ihli. The expansion, said Ihli, "will represent the single largest

construction project in our city's history in both size and value. We are proud Graco has chose to expand and invest in Rogers, and we look forward to the partnership with Graco for many years to come."

The Minnesota Department of Employment and Economic Development (DEED) is supporting the expansion with a \$700,000 loan from the Minnesota Investment Fund and an \$800,000 grant from the state's Job Creation Fund.

"Graco considered multiple U.S. sites for this project but ultimately chose to expand in Rogers," said DEED Commissioner Shawntera Hardy. "The company's decision is a testament to the area's talented workforce."

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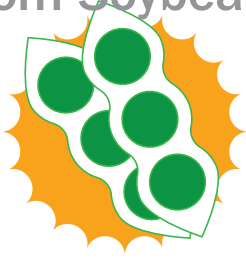


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Paul Nevanen, Director
 800.452.3569
paul@businessupnorth.com

Extracting Added **Value** from Soybeans



Epitome Energy of Red Wing, Minn. announced plans in January to open a \$130 million plant for soybean extraction and biodiesel production in Crookston, just east of Grand Forks.

“Northwest Minnesota has long been underserved in the area of value-added processing for the soybean growers,” said Dennis Egan, Epitome’s owner. “Over 1.8 million acres [728,434 hectares] of soybeans are planted in the 10 counties surrounding Crookston,” Egan added, “making this a strategic location for a project this size.”

Soybeans are Minnesota’s second most valuable cash crop, trailing only corn. Minnesota is the nation’s third largest producer of soybeans, with the crop accounting for 30 percent of the state’s agricultural exports.

A study conducted by the University of Minnesota Extension found that the plant will generate \$322.8 million in new economic activity and support 330 new jobs, including up to 100 direct jobs. Epitome says it will build a 21-million-bushel soybean solvent-extraction plant, a 30-million-gallon biodiesel plant and a specialty soybean mechanical extraction processing plant that will provide for specialty oil refining. Construction is expected to begin in 2021.

The Minnesota Department of Transportation awarded Epitome a \$450,000 grant for improvements in rail infrastructure at the 100-acre (40-hectare) site.

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*CNBC (2007-2018); 1st and 3rd (2015, 2017)

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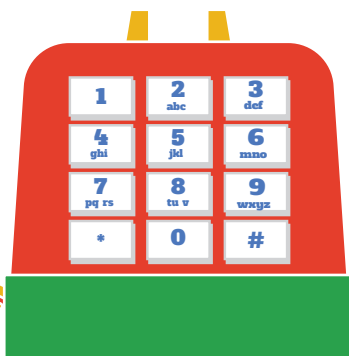
A recent regulatory filing by Minneapolis-based Xcel Energy disclosed that Google is considering building a giant data center in the Minnesota town of Becker, 50 miles (80 km.) northwest of Minneapolis. The \$600-million facility in Sherburne county would draw power from two massive wind farms. The Google server farm would mark one of largest private construction projects in recent state history, while creating 50 full-time tech positions and about 2,000 construction jobs.

The biggest utility in Minnesota, Xcel would sell Google about 300 acres for the facility and would supply the electricity to run it. Google relies on renewable energy to power all of its data centers. The proposed site is near Xcel's largest power plant in Minnesota — Sherco — where Xcel plans to retire two coal-fired generators by 2026.

Xcel's filing says the Google project in Becker would help it transition from coal.

"By locating there, this project becomes part of the company's journey to mindfully

GOOGLE CALLING



transition a coal-plant environment into a less carbon-intensive, business-oriented area that creates new jobs, results in significant private capital investment in the state and benefits all of the company's customers."

In December, Xcel announced a commitment to achieve 100 percent carbon-free electricity across its service territory by 2050. It would serve Google's data center with 300 megawatts of wind power.

"We're accelerating our carbon-reduction goals because we're encouraged by advances in technology, motivated by customers who are asking for it and committed to working with partners to make it happen," said Ben Fowke, Xcel's chairman, president and CEO.

Minnesota is currently home to 33 data centers, 27 of which are in the Minneapolis area, according to the tracking service Data Center Map. Companies that build data centers in Minnesota of at least 25,000 sq. ft. (2,323 sq. m.) and invest at least \$30 million in the first four years qualify for 20-year tax breaks on computers and servers, cooling and energy equipment, energy use and software. Minnesota levies no personal property tax.



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(continued from page 158)

"Our economy is not growing as fast as some other states, but we have steady growth," says Loon. "If we could bring more regulatory certainty to the state and a little more competitive tax structure with solid capital investment from the private sector, we have a very bright future. But what we're suggesting to policy makers is that we need more robust growth."

... **We need more robust growth."**

— Doug Loon, President,

Minnesota Chamber of Commerce



On January 7, former U.S. Rep. Tim Walz was sworn in as Minnesota's 41st governor, succeeding fellow Democrat Mark Dayton. Dayton, in 2017, delivered \$650 million in personal and corporate tax relief, including business-backed measures that cut corporate property taxes, reduced the estate tax and boosted credits for research and development. Dayton twice vetoed bills supported by the Chamber that would have brought state taxes into conformity with the federal code.

Walz, for his part, has touted the idea of a 25-cent-per-gallon gasoline tax to pay for infrastructure and transportation improvements. Republicans, who control the state Senate, deride the proposal as anti-competitive. Even so, Loon describes Walz as a pragmatist, and says he expects good things from the new governor.

"He understands the connection between successful communities, a successful state economy and having a vibrant private sector that is the economic engine of the state.

"At the same time," Loon says, "we've got to have a reliable regulatory environment that is consistent and works at the speed of commerce. That's a goal. Will we ever get there? I don't know. We want the process of regulatory review and permitting to run smoothly and efficiently, and I believe Governor Walz wants to pursue the same goal." ▼



Film and TV production, clean energy, education and small-town infrastructure lead the agenda of newly elected Governor Michelle Lujan Grisham.

by SAVANNAH KING
savannah.king@siteselection.com

After only two months in office, New Mexico's new governor is shaking things up and making history in the process.

On January 1, Governor Michelle Lujan Grisham was sworn into office as the first Latina Democratic governor in U.S. history. The election's historical significance was also noteworthy because it was the first time in state history a woman — former

(Republican) Governor Susana Martinez — passed the baton to another woman.

A 12th-generation New Mexican, Lujan Grisham has spent much of her career advocating for families, senior citizens and veterans, and working to make health care accessible. In her inauguration speech she credited her late father, Buddy Lujan, with teaching her the importance of caring for those in need. He ran a discount dental

office out of his garage for low-income New Mexicans.

Lujan Grisham says she will be focused on helping to make sure every child and family has everything they need to be successful.

“It’s also time we act with urgency to increase investments in our local rural communities, particularly when addressing infrastructure,” she tells Site Selection. “Improvements must be made to our water systems, our dams, our school buildings and broadband internet. Transforming infrastructure will not only help address these critical needs but also help leverage economic development in those often-forgotten communities.

The following are excerpts of our exchange with Gov. Lujan Grisham.

SS: What are some of the biggest advantages for businesses located in New Mexico?

Grisham: I think businesses can sometimes underestimate the opportunities we have here. One of those is the affordability for new ventures. Land, for both businesses and employees, is priced relatively low compared to other states. Not only that, but the housing and cost of living is also very competitive. We have a terrific workforce of talented young adults who want to stay here but need additional opportunity — it’s one reason I am committed to investing in small business in my administration, in training and workforce development programs.

Our tax rates are reasonable. I want to diversify our economic suite. We invite all businesses to discover the rich renewable energy resources New Mexico has to offer — there’s tremendous opportunity here to be part of the transformation that will take place as New Mexico becomes the nation’s clean energy leader. My administration is committed to utilizing this source, not only to reduce harmful emissions in the threat of climate change, but to also grow our economy. A push for an increased Renewable Portfolio Standard will boost investment in both wind and solar, where we know New Mexico can be a national leader. This industry can attract major new employers and of course create good jobs and careers for New Mexicans.

I am proud to already be taking action on this front: I announced the introduction of legislation to raise our renewable portfolio standard to 50 percent by 2030 and 80 percent

by 2040, and increasingly bold legislation is still to come, setting New Mexico on a path to improved capacity and delivery. I’ve joined the U.S. Climate Alliance through executive order, holding our state to the Paris agreement even as the federal government continues to fail us. States can and will lead. A methane mitigation rule is also in development, which will deliver additional revenue and jobs as we stop wasting and leaking methane and instead begin recapturing it.

SS: You’re pressing for an increase in teacher salaries and universal preschools. Why is this a critical issue for New Mexico?

Grisham: For years now, New Mexico’s education system has been starved, and raising teacher salaries is the first step to truly paying educators what they’re worth. We have to show that we value our education professionals, not just say so. It’s crucial to both compensate teachers for their important work and be able to attract and retain talented educators. New Mexico has hundreds of teacher vacancies across the state that I intend to fill, and raising those salaries is an important aspect to attracting and retaining them.

Education is the foundation of opportunity and has the potential to be the great equalizer for children from all backgrounds. The research is very clear: Children who attend preschool are far better prepared than those who don’t, and we should make that a reality for every child. That’s why I’m committed to every three- and four-year old in New Mexico having access to Pre-K. Not only is it an essential investment in our children, it’s a smart investment in our state’s future.

SS: Netflix recently moved into its new Albuquerque studio and has some promising figures for its business in New Mexico over the next decade. Can you tell us what some of these innovative media companies find when they do business in your state?

Grisham: Our crew base is the greatest in the country. We have talented professionals all over the state who can populate a production and get it done on time and on budget. Our ability to continue to attract productions speaks to the capacity and quality of our crews. We also have tremendous facilities, as demonstrated by Netflix’s purchase, both in Albuquerque and Santa Fe, and I expect more world-class facilities

to be built as we attract more film and television work in coming years.

Another item I'd be remiss not to mention is the stunning outdoor beauty of our state. Productions come here not merely to film Westerns, but New Mexico is, for all intents and purposes, what people think of when they think about the West, because of our appearances on both the big and small screen. What I want media companies to know about the future is that New Mexico will no longer get in its own way. By that I mean that in the past, we have had a state administration that sought to hamstring the film industry through a restrictive "cap" on rebate payouts and other bureaucratic malaise. Just last week I was proud to announce the introduction of Senate Bill 2, which will eliminate that cap and streamline our credit system. We are open for business, and we're acting like it.

SS: What would you say is the single most important economic development advantage New Mexico has to offer?

Grisham: Our advantages are myriad, but one item to highlight would be our willingness and eagerness to collaborate. Under my administration, we will work with the prevailing momentum of economic development, not against it. As the country and world turn to clean energy, we will embrace our destiny as a leader in this area, and our state agencies will facilitate growth by working with developers and entrepreneurs up and down the spectrum. As media companies grow, we will reach out and proactively partner with them, as was the case with Netflix, and as will be the case with more companies to be announced soon. We will explore the exciting digital media space, whether it's video game development, as recently announced in Las Cruces, post-production or virtual reality. Whether it's cybersecurity or aerospace or value-added agriculture, New Mexico wants to work with you. It's the foundation of sustained growth, this proactive attitude, and I'm excited to be in a position where we can follow through on our aspirations. ▼

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The South's Magnet

for Foreign Direct Investment

South Carolina leads the nation in percentage of jobs linked to non-U.S.-based enterprises.

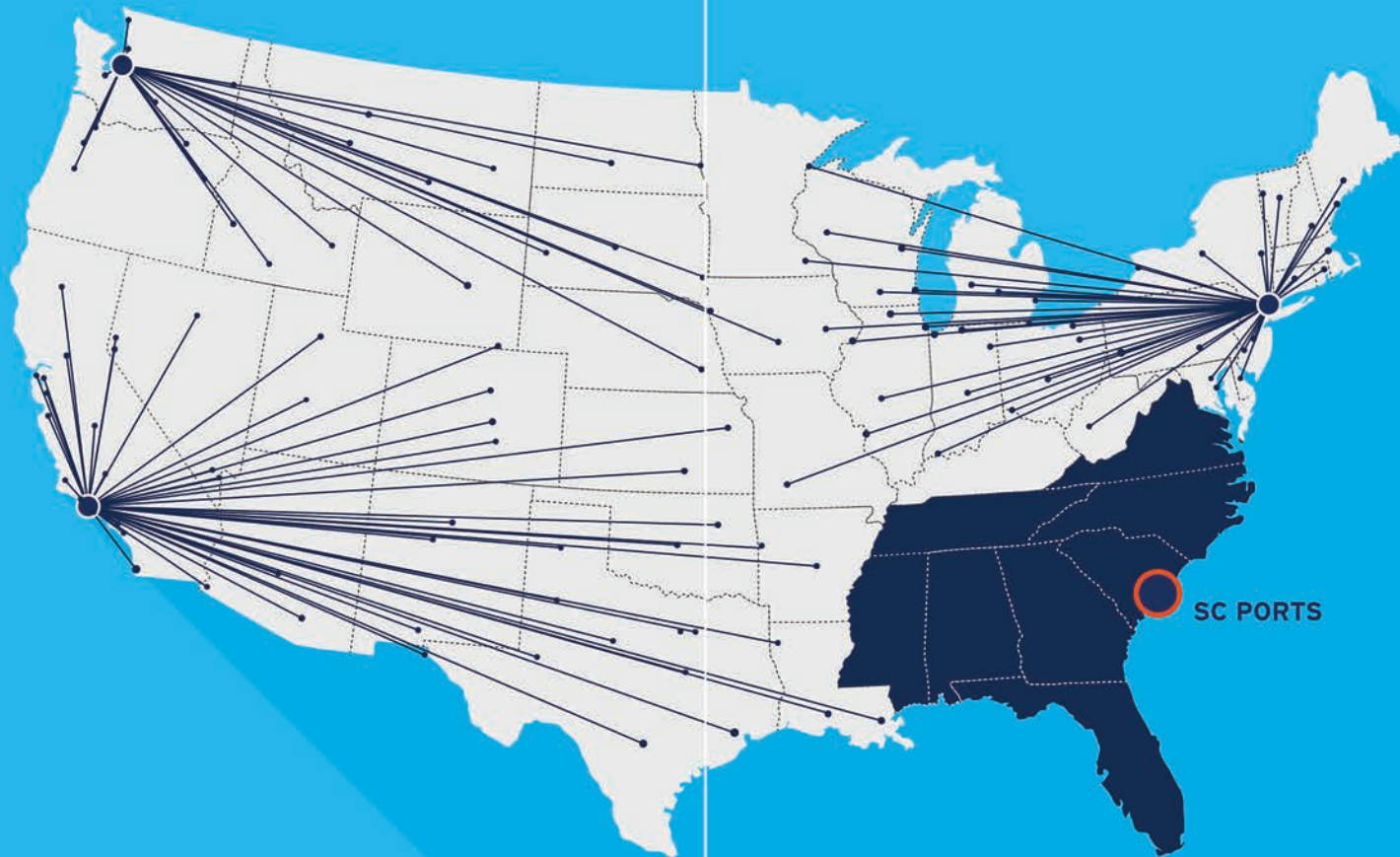
by MARK AREND

mark.arend@siteselection.com

Southern hospitality might be part of it, but South Carolina is one of just a handful of states in which more than 7 percent of total private sector employment is due to foreign direct investment. In fact, at 8.2 percent, according to the Organization for International

Investment (OFII), it's the highest proportion in the United States, a distinction the Palmetto State shares with only New Jersey.

In January, OFII released its latest state-by-state data analysis, detailing the impact of international companies to the U.S. economy. It is a compilation of data released by



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Foreign Direct Investment In South Carolina

● 1-5 ● 6-18 ● 19-46 ● 47+

Circle size represents total number of companies for each country of origin within a specific county. Locations are only a representation of operations in the county and are not meant to show a specific location.

South Carolina Department of Commerce

the U.S. Bureau of Economic Analysis in late 2018. How significant is this investment? Very.

Nancy McLernon, OFII's president and CEO, explains: "International companies operating in the United States are a good measure of U.S. competitiveness. Today, 7.1 million U.S. workers are employed by international companies, earning an average of \$81,000 in wages and benefits annually — 26 percent more than the private-sector average. What is even more interesting, however, is that international companies have created 62 percent of all new U.S. manufacturing jobs over the past five years, underscoring the importance of international companies to America's economic well-being. In fact, international companies operating in states like Florida, Iowa, Michigan, North Carolina and Ohio have grown their manufacturing workforce by more than 20 percent over that period. As these government data show, international companies help diversify America's economy, making it more resilient to downturns."

Among the key findings in OFII's analysis are these:

- **Top Five States for FDI Jobs:** California

(769,200 jobs), Texas (596,900), New York (499,100), Florida (348,800) and Illinois (340,500). These five states account for 36 percent of all FDI jobs in the United States.

- **Six States with the Highest Concentration of FDI Jobs** (FDI jobs as a share of total private sector employment): New Jersey and **South Carolina** (tied at 8.2 percent),

Kentucky (8.0 percent), New Hampshire (7.5 percent), and Connecticut and Indiana (tied at 7.2 percent). The national average is 5.6 percent.



MANY EMPLOYERS

More than **710 international employers** have operations in South Carolina.

- **10 States with the Fastest FDI Employment Growth Rate Over the Past Five Years:** Utah (45.7 percent), Florida (43.8 percent), Tennessee (41.3 percent), Oregon (41.0

percent), Michigan (39.7 percent), Kentucky (37.1 percent), Mississippi (36.3 percent), South Dakota (36.0 percent), Missouri (35.0 percent) and Arizona (34.8 percent). The national average is 24.4 percent.

- **Leading American Manufacturing:** International companies were responsible for 62 percent of U.S. manufacturing job growth, contributing 377,200 of the 606,000



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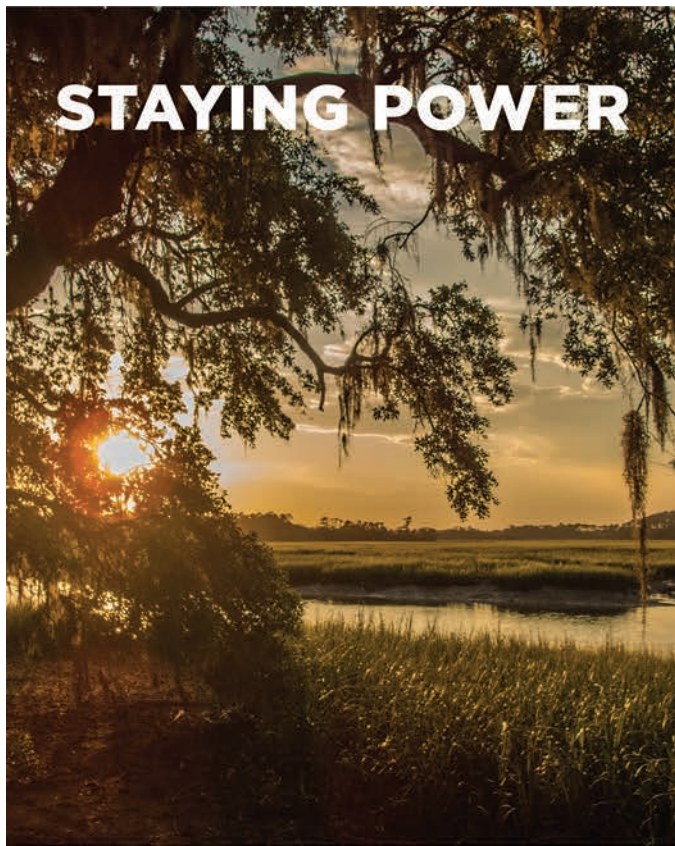
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SAMSUNG
Samsung, one of the world's leading technology companies, opened a new home appliance manufacturing facility in Newberry County, SC.

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Newberry Electric Cooperative*



VOLVO CARS
Volvo Cars' next-generation S60 Sedan and the XC90 Sport-Utility will be manufactured in Berkeley County, SC, and exported globally through the Port of Charleston.

*Powered by
Edisto Electric Cooperative*

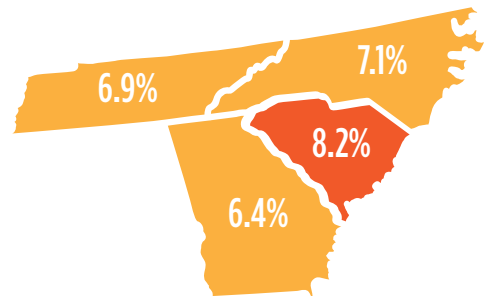


MICHELIN NORTH AMERICA
Michelin North America selected Spartanburg County, SC, for its new \$270 million, 3.3 million square-foot distribution center.

*Powered by
Laurens Electric Cooperative*



South Carolina vs. Its Neighbors FDI Jobs as a % of total Employment



net manufacturing job gains made from 2011 to 2016 (latest available data). The 10 states with the fastest FDI manufacturing growth rate include: Rhode Island, South Dakota, Oregon, Michigan, Kentucky, Nebraska, Iowa, Tennessee, Utah and Minnesota.

More than 1,200 operations owned by non-U.S. entities are active in South Carolina. Combined, they employ nearly 132,000 residents. In Greenville County alone, more than 100 international firms from 22 countries are active, many of which are suppliers to the Upstate's automotive industry, anchored by BMW and Michelin North America.

But they can be found throughout the state, and more are opening operations every month. Recent newcomers to South Carolina from outside the U.S. include:

In the past five years, South Carolina's FDI employment

↑ **21%**

while the state's overall private-sector employment

↑ **14%**

AKPA Kimya Organic Peroxides and Initiators (AKPA Kimya) will locate a new distribution and warehousing facility for organic products in Fairfax, in Allendale County. The development is projected to bring \$2.6 million in capital investment and create 13 new jobs. Founded in 1997 in Istanbul, Turkey, AKPA Kimya specializes in the production of organic peroxide, initiator, accelerator and paint dryers used in the composite, petrochemical and paint sectors. The facility is expected to come online in the second quarter of 2019.



GLOBALY CONNECTED

Among all international employers, those from **Germany, France, and Japan** support the largest number of jobs in South Carolina.

Fuyao North America Inc., a venture of China-based Fuyao Glass Industry Group Co. Ltd. (Fuyao Group), is launching a new processing center in Greenville County. The company's \$16.1-million investment is projected to create approximately 70 new jobs. Since 1987, the Fuyao Group has been producing high-quality automotive glass for OEMs and aftermarket suppliers. Operating as one of the largest producers of automotive glass worldwide, the company holds more than 300 patents and manufactures 4 million glass car sets in the United States annually. Fuyao North America Inc. will be establishing a new, 182,000-sq.-ft (17,000-sq.-m.) processing center with light production capabilities in Fountain Inn.

Miwon Specialty Chemical Co. USA, a manufacturer of raw materials and subsidiary of Miwon Specialty Chemical Co. Ltd., will locate new production operations in Richland County. The company's \$19.5-million investment

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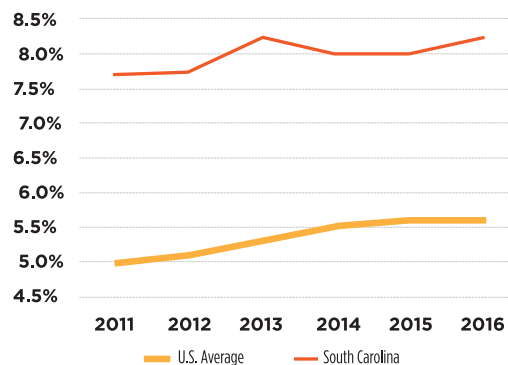


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South Carolina vs. USA

FDI Jobs as a % of Total Employment



South Carolina beats the national average in its portion of jobs supported by international investment.

is projected to create 25 new jobs. Based in South Korea, Miwon Specialty Chemical Co. is a global company with manufacturing plants in South Korea and Spain, as well as research and development centers in Austria, China, South Korea and the United States. The company produces and supplies raw materials for eco-friendly UV/EB curing systems that are utilized in a variety of applications, including in high-quality inks for food packaging; in special coatings for wood, plastic and metal; and in adhesives for DVD/Blu-ray discs and mobile phones. The new, 65,000-sq.-ft. (6,000-sq.-m.) production facility will be located in Columbia.

VTL Precision, a leading U.K.-based developer and manufacturer of precision-engineered engine, transmission and turbocharger



MANUFACTURING

74,600 workers in South Carolina — **53 percent** of all FDI jobs in the state — are in the **manufacturing sector.**

components for the commercial vehicle and passenger car markets, is locating new operations in Goose Creek, in Berkeley County. The company's \$8.2-million investment is projected to create 10 new jobs. VTL Precision is a venture of VTL Group, a privately owned automotive and precision engineering company with manufacturing operations in Europe, India and North America. Specializing in the design, development and manufacture of high-specification, complex machined components, VTL Group supplies a variety of original equipment manufacturers and tier one suppliers.

The Quality Model Group of companies (The QM Group) will expand its existing

Orangeburg County plastic injection molding operations. Its \$9.5-million investment is projected to create 37 new jobs. Headquartered in Ontario, Canada, The QM

Group specializes in mold building, injection molding, urethane molding, thermoforming and secondary assembly. The company operates five North American facilities, including locations in Indiana, Michigan, Ontario and South Carolina. The

Orangeburg County facility operates under The QM Group's plastics division, which offers design, tool building and manufacturing services for the power sports, industrial, automotive and aftermarket industries. ▼



QUALITY JOBS

140,400 workers in South Carolina are employed as a result of international investment.

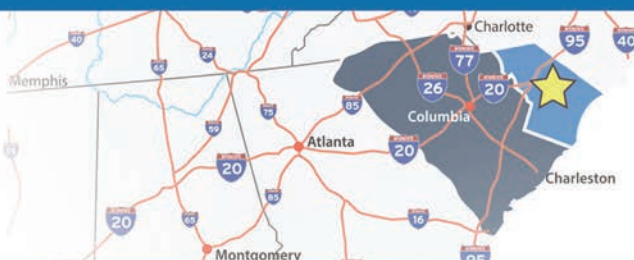
Infographic information courtesy of Organization for International Investment



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It's All About The Talent

A month into his tenure, the new governor of Illinois lays out his vision for prosperity.

If there's one thing most business associations and chambers resist, it's raising the minimum wage. But that's what new Illinois Governor J.B. Pritzker just did in February.

"When your house is burning down, you don't wait for the rain to put out the fire," he said in his budget address just hours after signing into law a measure making Illinois the first state in the Midwest to phase in a \$15 minimum wage over the next six years. The state's current minimum wage is \$8.25.

"Today is a victory for the cause of economic justice," Pritzker said as he signed into law SB 1, which also provides small businesses and non-profits in the "collar counties" outside Chicago as well as downstate with a tax credit to ease the transition. The new law doesn't kick in for a year, but in Pritzker's estimation, it's already been too many.

"It's been nine long years since workers got a raise. And even nine years ago, the raise amounted to 25 cents an hour. For nine long years there were an array of forces lined up against giving a raise to the people who work hard to provide home care for seniors, child care for toddlers, who wash dishes at the diner and who farm our fields."

But in addition to crediting labor organizations,

Advanced manufacturing is advancing at Ford's Chicago Assembly and Stamping Plants, where the automaker in February pledged to invest \$1 billion and add 500 jobs, bringing total employment at the two plants to 5,800.

Photo courtesy of Ford Motor Co.

by ADAM BRUNS

adam.bruns@siteselection.com



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he also paid heed to business leaders.

“It took years of advocacy by so many people across the state and a willingness by businesses to sit at the bargaining table to hash out a deal so that the people of Illinois wouldn’t have to wait any longer,” he said. “Businesses large and small, from local restaurants to Amazon, made it clear that hardworking employees should be

central to the values system of the talent he wants to attract to Illinois.

“We want to help people in communities left out or left behind to start businesses,” he says. “There are people of color who live in our state who have some amazing capability that is underutilized. That should be attractive to companies that Illinois is focused on equity. Let’s face it —



I’ve spoken three times over the last 24 hours with Republicans, and that hasn’t happened much in the last four years or even the last 20.”

— J.B. Pritzker, Governor of Illinois

fairly compensated. And even when we didn’t agree on everything, they were willing to be part of the negotiations to make the minimum wage work in our communities.”

In an interview with Site Selection that took place before the signing, Gov. Pritzker — brother to former U.S. Commerce Secretary Penny Pritzker (see our interview with her on p. 84) — addressed the wage measure first, as it was still making its way through the state legislature.

“Let me start with the fact that Chicago already has a \$12 minimum wage, it’s going to \$13, and businesses are thriving,” he said.

It’s part of a focus on economic inclusion and equity that is not only central to Pritzker’s plans, but, he feels,

many of the companies that have been hugely successful have been started by millennials who care about this, and want to be in a place that values equity and stands up for civil rights.

“We have the strongest laws that stand up for the LGBTQ community, great civil rights laws and now the most diverse government in the history of the state,” he continues. “We have more women in leadership positions in my governor’s office than we do men, and more women in leadership positions in my cabinet. Those are features that are very attractive for companies around the nation, and they’ll lead us to prosperity going forward.

Engineering a Talent Pipeline

In his inaugural speech, Pritzker

The 78, a walkable development from The Related Companies that city documents showed was Amazon’s first choice for HQ2 if the company had chosen Chicago, aims to knit together the Loop, South Loop, Chinatown, Bronzeville and Pilsen.

Rendering courtesy of The Related Companies

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RIVETING PROGRESS BY RIVIAN MEANS HOPE FOR RENEWED NORMAL

Site Selection readers first learned of Rivian last year, when Gary Daughters reported on the company's plans to develop new electric pickup trucks, amid plenty of skepticism, given a spate of "revolutionary" EV developers over the past decade whose plans never left the garage. Central to the California company's plans is the reuse of the closed Mitsubishi plant in Normal, Illinois.

But a new round of belief was stoked in February when Rivian announced an equity investment round of \$700 million led by Amazon. The investment comes on the heels of Rivian's reveal of the all-electric R1T pickup and R1S SUV at the Los Angeles Auto Show last November. Rivian says the vehicles have 400+ miles of range. The designs use the company's flexible "skateboard" platform and will be produced at Rivian's manufacturing plant in Normal, with customer deliveries expected to start in late 2020.

"This investment is an important milestone for Rivian and the shift to sustainable mobility," said RJ Scaringe, Rivian founder and CEO, in February. "Beyond simply eliminating compromises that exist around performance, capability and efficiency, we are working to drive innovation across the entire customer experience. Delivering on this vision requires the right partners, and we are excited to have Amazon with us on our journey to create products, technology and experiences that reset expectations of what is possible."

With a team of more than 750 people, Rivian has development centers in Plymouth, Michigan; San Jose, California; Irvine, California; and Surrey, England; along with the 2.6-million-sq.-ft. (241,540-sq.-m.) manufacturing plant in Normal. Rivian says it will launch the R1T and R1S in the U.S. in late 2020, with introduction to other global geographies starting in 2021.

The company hopes to create as many as 1,000 jobs at the Normal plant, which employed 1,100 when Mitsubishi pulled the plug.

— Adam Bruns



Backed by a fresh round of capital from an equity investment round led by Amazon, Rivian says EVs based on its "skateboard" platform will be produced at its manufacturing plant in Normal, Illinois, with customer deliveries expected to start in late 2020.

Photo courtesy of Rivian

— founder of Pritzker Group in 1996 and founder of Chicago's legendary business incubator 1871 — said he'd be the state's best chief marketing officer. What's the elevator pitch from the man who's heard his share of them?

"What businesses are looking for is great talent, and a great supply of talent over a long period of time," he says. "Illinois has some of the most educated and experienced workers in the nation. The University of Illinois-Champaign is one of the top five engineering schools in the country, and produces more engineers than the other four of the top five every year. We have other great universities in southern Illinois and at our 'directional' universities, not to mention Northwestern, DePaul and the University of Chicago."

A less-touted factor is the ability to find middle management, he says, as well as skilled labor aided by currently expanding vocational training, apprenticeship programs and community college training activity.

"It's important that our colleges, universities and community colleges are matching programs and skills development with the jobs of today and tomorrow," says Pritzker. "We have these tremendous educational institutions that are in some ways our best assets in the state."

He doesn't want to see the talent those schools are producing siphoned away, and thinks there is an opportunity inherent in the desires of Illinois students, many of whom want to stay in or return to the Midwest.

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“We have the greatest diaspora of engineering talent of any state in the United States, and the greatest number that return,” he says. A recent study conducted with LinkedIn showed promise. “Many of them like the lifestyle and standard of living they can have in the Midwest. It’s the best place to raise a family, and many who leave and started a family say to themselves, ‘I’d rather go home.’”

Learn & Churn

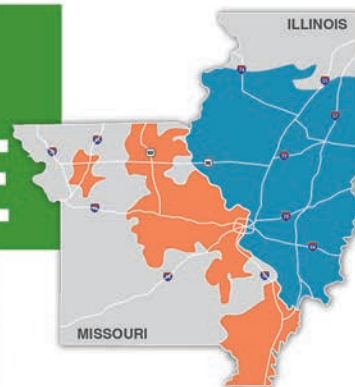
“At every level, for companies looking for talent, we’ve got it,” Pritzker says. “We also have a burgeoning technology community, both startups and later-stage companies. I founded the number one university-based incubator in the world, 1871, in 2012. Also, at the Chicago World Business Council, I

was chairman of Chicago Next, the tech and entrepreneurship committee, and helped launch the incubator called Matter, for healthcare startups.”

Other accelerators and incubators include The Digital Manufacturing and Design Innovation Institute (DMDII), located in a former window factory on Goose Island in Chicago. The Institute just celebrated its fifth anniversary with the news that the Department of Defense would invest \$10 million this year and at least \$20 million over the next five years to promote advanced digital manufacturing R&D.

The Institute has attracted more than 300 partners, including Dow Chemical, Lockheed Martin, Rolls-Royce, Siemens, and McKinsey & Company. Since its founding in 2014, DMDII has invested approximately \$90 million in more than 60 applied research projects nationwide, including work across the state at the U.S. Army’s Rock Island

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Arsenal, the nation's largest government-owned weapons manufacturer, assessing the use of 3D modeling in manufacturing in order to get equipment to warfighters faster.

"Since our founding, the opportunity and urgency to lead the charge to digitize U.S. manufacturing has only grown," said Caralynn Nowinski Collens, CEO of UI LABS, DMDII's parent organization, when the funding was announced in February at an event attended by Gov. Pritzker.

"Manufacturing is a critical part of the Illinois economy and we must maintain America's competitive edge," said U.S. Senator Dick Durbin. "UI LABS helps our state and our nation achieve success on both fronts."

Since he went into business as a venture capitalist more than 20 years ago, Gov. Pritzker has been involved in building

the entrepreneurial and tech economy in the state.

"I've been involved in helping to create incentives for new businesses to get started — the angel tax credit for example — and promoting tech from our universities," he says, in addition to helping create many organizations such as the Illinois Venture Capital Association, the first big tech accelerator called TechStars Chicago and the seed fund for what is now known as Chicago Ventures.

"I've been very involved in helping to grow the ecosystem for startups," he says, and naturally that has involved getting to know people, places and companies around the world. Asked what he thinks of linking to one of the world's top entrepreneurial economies in Israel, he says, "As it happens, I've spent a reasonable amount of time in Israel, I know the authors of 'Startup Nation,' and

Left: The University of Illinois at Urbana-Champaign's master plan for the University of Illinois Research Park and EnterpriseWorks incubator, adopted in September, aims to double the park's size.

Image courtesy of University of Illinois Research Park



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INCENTIVES



I think there are some great opportunities Israel has taken advantage of. What Israel has done is a lot of what Chicago and Illinois has done or can do. We may be located in the center of the country, and people think technology only happens on the coasts, but the reality is there is a great deal of industrial technology and financial trading technology vital to Midwestern industries.”

Compelling evidence of Chicago-Israel connectivity came in January, when Yisum, the tech transfer unit of the Hebrew University in Jerusalem, announced the opening of three centers of international cooperation in Chicago; Asunción, Paraguay; and Shenzhen, China, to facilitate regional commercialization of technologies from the university. In Chicago, Yisum will participate in the Discovery Partners Institute, led by the University of Illinois System, its three universities and other partners, with an initial focus on entrepreneurship, biosciences, computer science including AI, big data and cybersecurity, as well as food and ag technologies.

Keep it Moving

Pritzker says it’s a bit early in his tenure to be making specific trade mission plans. But traveling in state is a hot topic.

“That includes making sure we have the rail systems and interchanges in places like Decatur, and maybe bringing a port to Cairo in far southern Illinois. I’ll shortly introduce a capital bill for the state to make sure we’re maintaining our position as the supply chain hub of the nation. We have to have the capability to move goods into and out of the state. The more we can move, the better our economy does.”

Movement of data will help too, which is why internet infrastructure expansion is on his punch list too.

“We’re working with broadband providers even now, making sure we are bringing broadband across the state, to places that have a lot of incredible talent like Carbondale or Edwardsville or Peoria. We have an opportunity to attract businesses to Chicago as well as downstate Illinois, as we strengthen our internet infrastructure across the state.”

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Money Talk

Governor Pritzker says his team is looking to attract business and “I’m here to talk to any business.” Chances are one of the things those companies will want to talk about is stability.

It’s been on the minds of Illinois companies and citizens for some time, as the state’s fiscal condition is among the worst in the nation and the state has been shedding population.

“From the moment I won the election in November, I’ve been working across the aisle with Republicans as well as Democrats to make sure we’re all focused on raising up the business climate in Illinois and putting us on a strong fiscal footing,” he says. “I’ve spoken three times over the last 24 hours with Republicans, and that hasn’t happened much in the last four years or even the last 20.”

Pritzker in late February unveiled his budget plan. Among its planks is something many have been championing for years: a

fair tax. “A fair tax will change the arc of Illinois’ finances forever,” Pritzker said. Other facets of the plan include legalizing and regulating adult-use cannabis; legalizing and taxing sports betting; and taxing insurance companies to cover Medicaid costs. (See budget speech sidebar, p. 188.)

“It took a lot of years to get into the situation we’re in,” he says, “and it will take a few to get out of it. I ran on stabilizing and fixing the challenges we face, I won on that, and I’d say we have a mandate for that. People should have faith — I’m a business person and somebody who cares deeply about the state. We will grow our economy and attract businesses as well as help working families around the state.”

But first those families have to be willing to stick around. When asked about population decrease, Pritzker immediately connects it to what he says has been the underfunding of



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* Photo by Randy Benzie

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GOVERNOR PRITZKER OUTLINES HOW TO FIX ILLINOIS

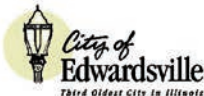
*Excerpts from Illinois Governor J.B. Pritzker's Budget Speech,
February 20, 2019:*

- “We must stop slashing programs that build future prosperity – if we cut skills training and college affordability, we curb near-term economic growth, lower our prospects for future revenue, and drive businesses away ... I’ve proposed a 5-percent increase for public universities and community colleges, as well as an increase in the Monetary Award Program by \$50 million to help more than 15,000 more low- and moderate-income students attend college next year. We will do more every year to come. I’m also proposing \$35 million for the second-year costs of the AIM HIGH merit scholarship program for high achieving students — so we can keep our best and brightest in Illinois.”
- “A fair tax is what three quarters of states with income taxes have. We can accomplish this with a more competitive rate structure than Wisconsin and Iowa, both of which are outpacing Illinois in job creation and economic growth.”
- “Programs that don’t work need to be eliminated. And we need to explore new ways to address old problems. Efficiently saving tax dollars, though, isn’t enough to lift Illinois out of our fiscal mess. We must also grow jobs. We can do that by fostering a business environment in Illinois that will attract talent and entrepreneurs from all over the country.”
- “I want downstate Republicans and Democrats to work together with me on a Downstate Revitalization Plan to encourage the creation of new businesses and jobs and foster the growth of existing ones in struggling communities so they can thrive.”
- “If we do it this year and become the first state in the Midwest to move on this initiative, we can realize more than \$200 million from sports betting fees and taxes in FY 2020.”

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universities over several years, and the limited amount of Monetary Award Program (MAP) grants, available to students attending qualified colleges in Illinois who demonstrate financial need, regardless of grade point average.

“When you’re a 17- or 18-year-old and thinking about whether you’re going to go to a university in Illinois that’s supposed to provide you a MAP grant — but you don’t know if you’re going to get it [due to lack of appropriated funds] — versus another university that’s positioned in another state that doesn’t seem to be unstable, you’re going to choose the stable over the unstable,” he says. “It’s very important to me that we establish the MAP grant as something not subject to partisan rancor, but stable and available to students across the state. When students get up and leave, 70 percent don’t come back, and sometimes families go with them.”

In his budget address in February, he addressed these linkages directly:

“Illinois is faced with a \$3.2-billion budget deficit and a \$15-billion debt from unpaid bills,” he said. “Last year alone, the state paid out more than \$700 million in late payment penalties. That’s enough to cover free four-year university tuition for more than 12,000 students. We are dealing with a fundamental structural deficit that has existed for quite some time and spanned the administrations of several governors. And it won’t be solved until we rethink our spending priorities and some basic revenue issues facing the state. During a time of unprecedented economic growth across the country, we lost four valuable years because of an ideological battle. That stops now.”

Show Us Your Plans

In February, with input from more than 400 stakeholders, the Pritzker administration published 11 transition committee reports, covering such areas as growing the ag economy, restoring quality to the state’s infrastructure, addressing power generation and energy, and job creation and opportunity (view them at www2.illinois.gov/sites/gov/Pages/Transition). For that last topic, the report offered a candid self-assessment of where a state with natural competitive advantages is not necessarily realizing them:

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Chicago already has a \$12 minimum wage, it's going to \$13, and businesses are thriving.”

— J.B. Pritzker, Governor of Illinois

wide range of industries, from agriculture and manufacturing to professional services and health care, have a robust presence in Illinois. Industry in Illinois benefits from a qualified workforce: 33 percent of residents have a bachelor's degree or higher relative to the national average of 30 percent ...

“Yet despite its advantages, Illinois' economy has been underperforming: Both GDP growth, 0.5 percent per year, and labor productivity growth, 0.4 percent per year, between 2007 and 2017 lag behind national averages in the same

time frame, 1.5 and 0.8 percent, respectively. There are a number of challenges that may be driving this issue. For example, Illinois has experienced the highest levels of outbound domestic migration in the U.S., particularly among young people — the state ranked 49th in millennial population growth from 2010 to 2017 at a rate of -2.3 percent. From an employment standpoint, there is a lack of qualified candidates for available roles in middle- and high-skill occupations, e.g. health care services, computer/software, firstline supervisors of service workers, truck drivers.

“In addition, young companies across the nation are some of the most important job creators. However, Illinois lags most states across the innovation funnel,” the report said, from R&D funding (35th in university R&D) to the rate of new entrepreneurs, where Illinois ranked No. 19 among large states. “Complicating the issue, Illinois is home to high economic inequality across regions and populations. It is the U.S. state with the 10th highest economic inequality.

“Path forward: A principled approach to support workers and businesses. It will take a concerted effort and a holistic approach to address the full scope of challenges and revitalize the state's economy.” ▼

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From Idle to Active

Places once thought fossils — including two fossil-fuel power plants — welcome renewal from investors.

by ADAM BRUNS

adam.bruns@siteselection.com



A 1955 ad in this publication from Public Service Electric and Gas Co. (PSEG) in Newark depicted the crook in the Delaware River where New Jersey and Pennsylvania meet not far from New York as “industrial elbow room,” complete with an illustration of a flexing arm and clenched fist.

Today’s crowded industrial landscape in the region doesn’t afford much wiggle room at all. With 14.9 million sq. ft. (1.38 million sq. m.) of occupancy gains in 2018, New Jersey has now exceeded 10 million sq. ft. (929,000 sq. m.) in annual absorption for five years in a row, for a total of more than 67 million sq. ft. (6.2 million sq. m.), Cushman & Wakefield reported.

Creative redevelopment is just as robust, allowing some companies to flex and grow even in a tight marketplace.

In January, PSEG Power announced the sale of the sites of its retired Hudson Generating Station in Jersey City/Secaucus and Mercer Generating Station in Hamilton Township — two coal-burning power plants built in the 1960s and retired in 2017. But rather than convert to gas-fired power plants as so many electricity generation plants across the country are doing, these sites are destined for a full makeover.

The purchaser — Chicago-based Hilco Redevelopment Partners (HRP) — plans to

redevelop the sites as industrial parks to serve the growing need for regional warehouse distribution hubs in central and northern New Jersey.

National Trend

How many coal-burning power plant sites are in the national redevelopment mix? “Nationwide we tracked around 20 coal power plant retirements in the U.S.,” says Dan French, CEO of Brownfield Listings. He expects around two dozen more this year. “Natural gas is simply here to stay, thanks to U.S. superabundance. Eventually, even the coal plants being converted to natural gas will need retiring and we’ll go through another round of redevelopment,” he says, noting the viability of alternative uses such as habitat, recreation or “brightfields,” i.e. sites conducive to solar power development. “The ones in good locations will have more reuse options, like any brownfield, but most coal-fired power plants are not in locations where the highest and best use is obvious, easy or immediately available. It takes work. Fortunately, we’ve got more real, capable redevelopers than we’ve ever had.”

Other locations throughout the region are being redeveloped, repurposed and re-occupied to avoid that dreaded “obsolete” tag.

In Greater Philadelphia, Somerset Properties spent more than \$10 million redeveloping a

Macy’s and New York-Presbyterian committed to filling the remaining space at The JACX, Tishman Speyer’s 1.2 million-sq.-ft. creative office development currently under construction in the Queens Plaza district of Long Island City, New York.

Photo by Jesse David Harris courtesy of Tishman Speyer

property in Fort Washington, Pennsylvania, including the conversion of former warehouse space to loft office space. In January, residential developer Toll Brothers committed to a new corporate headquarters there through a long-term lease arranged by CBRE. Toll Brothers is expected to relocate its approximately 900 employees from their current space in Horsham, Pennsylvania, in the fall of 2019.

Crepini, a maker of crepes and other bread and wrap alternatives, has outgrown its space at the Brooklyn Meat Market, so is increasing its production capacity by 500 percent with a relocation to iPark, the name given to the former IBM campus in East Fishkill, New York, in the Mid-Hudson Valley. The facility in Dutchess County will bring an estimated 108 new jobs.

On Staten Island, a \$40-million loan through the federal EB-5 Immigrant Investor program has been repaid in full and on time by CanAm Enterprises. The funds went toward the first phase of construction of the Gulfport Marine Terminal, which has created 1,671 jobs within the geographic boundaries of the New York

Metropolitan Regional Center area defined by the EB-5 program. Subsequent phases are underway with nearly 2 million sq. ft. (185,800 sq. m.) of industrial logistics space completed.

The Gulfport Marine Terminal is being built on a 674-acre (273-hectare) tract of vacant land located on the Arthur Kill waterfront. The overall property's history includes a large tank farm and the ill-fated attempt to develop New York's first NASCAR race track. A 1-million-sq.-ft. (929,000-sq.-m.) building occupied by Ikea opened in August 2018, and an 850,000-sq.-ft. (78,965-sq.-m.) robotics-enhanced fulfillment center for Amazon opened in September 2018, marking the first Amazon fulfillment center Amazon in New York City (its HQ2 pulled out of town five months later). Both companies are now the largest employers in the borough.

"I am genuinely proud of the Gulfport Marine Terminal project — it shows that EB-5 is a great source of funding for industrial facilities that positively impact the surrounding areas, creating many direct and indirect jobs," said Tom Rosenfeld, CanAm's president and CEO. ▼

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CBRE



by RON STARNER
ron.starner@siteselection.com

How do you compete in business if you're not the biggest kid on the block? In the case of smaller and more agile tech firms, you do it by outsmarting the heavyweights.

When Michael Burton's rapidly growing Lev needed an outpost in the eastern half of the U.S., he chose Indianapolis. A Salesforce consulting firm with offices in Arizona and Texas, Lev announced on January 24 that it would hire 70 people to add to its 60-person workforce in Indiana's capital city. The firm also signed a lease for about 17,000 sq. ft. (1,580 sq. m.) in Regions Tower, where the company will have room for up to 200 workers.

Salesforce Tower, located a short walk from Lev's growing office in Regions Tower, is where Salesforce aims to invest some \$40 million over the next 10 years, and grow its own headcount to 800 by 2021.

"I was the first Indy-based Lev employee, and since 2016, we have worked out of five different temporary offices," Burton said. "It's exciting to finally move into our Indy home and to continue to fulfill our promise to add up to 175 jobs in Indianapolis. We have a great team in place, and I'm looking forward to adding more experience to that team."

Lev is not alone. All around Indiana, there's ample evidence that small business is big business. On February 1, the Indiana Economic Development Corp. announced that 2018 was a record-breaking year for small business growth in the state. The Indiana Small Business Development Center and the Indiana Procurement Technical Assistance Center helped launch 318 small businesses and secure \$86.3 million in government contracts for Indiana businesses, respectively, in 2018. Together, the Indiana SBDC and Indiana PTAC helped small businesses create 1,554 new jobs statewide.

"With more than 508,000 companies employing 1.2 million Hoosiers, small businesses play a critical role in maintaining long-term economic growth in Indiana and supporting good jobs in our communities," said Elaine Bedel, president of IEDC.

These include companies like Heliponix, an Evansville-based ag-bioscience startup which developed and commercialized an indoor plant-growing system called GroPod while its founders were at Purdue University. The firm used the

Southwest Indiana SBDC to prepare its business plan and financial projections along with a successful loan application through the Vectren Foundation loan program established by the Indiana utility.

Giving it the Old College Try

Purdue is a big player in small business growth throughout Indiana. On January 10, the West Lafayette-based school announced that it had achieved a milestone in startup creation in 2018 with 223 startups, more than \$350 million in funding and investments generated, and more than 300 new jobs.

“Purdue has a 150-year history of producing world-class research,” Purdue University President Mitch Daniels said. “Five years ago, we set out to establish an equally strong commercialization ecosystem to ramp up the translation of this research into the market and into real-world solutions. These efforts are clearly beginning to bear fruit, and to encourage us that these gains

are just a beginning.”

Why do so many small ventures choose Indiana as their home base? For example, small tech firms like FreightRover and Socio recently joined Lev in expanding in Indianapolis. Burton helped answer this question when he sat down for an interview with the Indy Chamber. When Lev needs to expand, he said, “We look at

two things — be close to Salesforce and be close to talent. With the many great universities here — Purdue, Indiana, among others — this is a no-brainer for us.”

Even though Lev only entered the market three years ago, Indy already ranks as the firm’s fastest-growing location. “This is outpacing our growth at our offices in Arizona and Texas,” he said. “We get help in getting training grants. That allows us to bring in people who are recent college grads and train them. We get them up to speed faster.”

Maureen Donohue Krauss, chief economic development officer for the Indy Chamber, says there are several reasons why small-to-medium-

sized firms like Lev succeed in the Indy region. “We have the right culture for the small and medium-sized companies,” she says. “There is a great support climate for entrepreneurial growth here. When ExactTarget sold to Salesforce a few years ago for \$2.5 billion, the principals stayed here and now they are growing smaller firms in this region. Scott Dorsey stayed here and started a venture fund to grow other tech firms here. It is pretty easy to succeed in Indy.”

Still, no one would choose a place without capable workers, and that’s where Indy excels, notes Krauss.

“When we were selected as one of the 20 finalists for Amazon HQ2 last year, that gave us a bump,” she says. “Others may have been surprised, but we weren’t. We graduate an incredible amount of talent that they need — whether that be from Notre Dame, Purdue, Indiana, Butler or others. The reality is that we are very appealing to Amazon and other tech companies. The second largest Salesforce talent in the world is based here now.”

Venture Capitalists Fulfill Hoosier Dreams

Add to that success the fact that Infosys, an Indian outsourcing tech company, plans to add 2,000 jobs by 2021, and you can see why Indy joined Chicago and Columbus, Ohio, as the only three Midwestern cities to make Amazon’s cut of 20 finalist cities.

The Indianapolis-Carmel-Anderson MSA now ranks as the No. 8 metropolitan area in the nation in overall economic strength, according to the updated 2019 POLICOM index — up from No. 49 just four years ago.

Even without landing Amazon, the Indy region recorded its best year ever for jobs and capital investment in 2018, securing 10,548 new jobs and \$2.4 billion in investment.

There’s plenty of evidence supporting a tech renaissance. ClearObject CEO John McDonald, for instance, announced in January that he had secured new owners for his Fishers-based company that specializes in Internet of Things integration. “If cash is oxygen,” he said, “we just strapped on a big oxygen tank.”

And McDonald is far from alone. Pitchbook and the National Venture Capital Association report that Indiana garnered 93 venture capital deals last year, good for a total of \$368 million.

Small ventures, it would seem, are big business in Indiana. ▼

When we were selected as one of the 20 finalists for Amazon HQ2 last year, that gave us a bump. Others may have been surprised, but we weren’t.”

— Maureen Donohue Krauss, *Chief Economic Development Officer, Indy Chamber*



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Hungry for a juicy story line, some of the nation's top scribes are suggesting that Larry Hogan is the Republican answer to Donald Trump. Larry who?

On the phone, Hogan can seem like a factory foreman with intimate knowledge of every nook and cranny of his plant. He is, in fact, the recently re-elected conservative governor of committedly liberal Maryland.

"The president's team is watching the 62-year-old Maryland pol like a hawk," blared Politico in January. "I don't know why people keep talking about that," Hogan laments to Site Selection.

Either way, there's no denying that tax-cutting Hogan, *sans* drama, has been a boon to Maryland's business climate. And he's showing that yes, we can all get along. The following are excerpts from Gov. Hogan's February conversation with Site Selection Senior Editor Gary Daughters.

Site Selection: You've been credited with making Maryland more business friendly. What steps have you taken to accomplish that?

Gov. Hogan: It's really the reason I ran for governor. I was a small businessman who was really frustrated with the direction our state was heading. In 2013, our overall economic performance ranked 49th out of 50 states. We had had 43 consecutive tax hikes that resulted in us losing 8,000 businesses and 100,000 jobs. I

by GARY DAUGHTERS
gary.daughters@siteselection.com

decided to run to do something about that, and that's what my entire, singular focus has been about for four years. We've completely turned it around. We've cut taxes, tolls, fees and regulations and been unabashedly pro-business. We've focused on it like a laser beam, and we've had one of the greatest turnarounds in America. We've cut taxes by \$1.2 billion, cut several hundred fees and over 800 job-killing regulations. It's now a great place to do business. We've dramatically changed the regulatory problem, and we've been chipping away at the taxes, although not as much as we would've liked. We're going to continue to try to make progress on all those things in the second term. We're proposing another half-billion dollars in tax relief with eight different pieces of legislation, and we're going to keep focused on growing jobs.

In recent years the state has provided sizable retention packages to both Marriott and Northrop Grumman. Your offer to Amazon for HQ2 was the biggest in the country at \$8.5 billion. Do you worry you are setting a standard that you might be expected to maintain?

Hogan: Well, look, philosophically, I would prefer to not ever have to do these kinds of incentive packages. My preference would be to lower taxes enough and to have us be such an attractive



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Governor Larry Hogan

place that all businesses would want to locate here. Unfortunately, this is the way the rules are, and we were competing against states that were offering incentive packages, so we had to deal with the cards that we were dealt. And we aggressively competed.

Maryland has high land costs, wages and taxes, all of which help add up to high business costs. Do you see those challenges as structural?

Hogan: The reason why we have high land costs is we have the best location in America. We're close to one-third of the country's population, we're surrounding the nation's capital and we're at the heart of the East Coast. We have one of the top ports on the East Coast and in America. We've got the number one airport in the Washington region. We have the highest median household income and one of the most highly educated workforces in America. People are willing to pay for that.

You are a popular Republican governor in a state that's more than two-to-one Democratic. How do you account for that, and is there anything that Washington can learn?

Hogan: Well, we're only about 30 miles down the road from Washington, but it seems like we're a million miles away in some respects. Maryland is only 26 percent Republican. I just became the second Republican in the entire 242-year history of our state to be re-elected. We've done things in a very bipartisan way. I've tried to reach across the aisle and come up with real, bipartisan, common-sense solutions and just focused on results and solving problems rather than trying to attack things in a partisan way. We've been able to find a middle ground. I think most people are really frustrated with Washington, with both sides of the aisle. They aren't getting anything done in Washington, frankly. I think they could pay a little more attention to what's going on right down the road here in Annapolis. ▼

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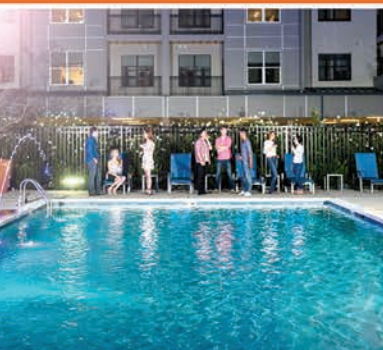
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INTELLIGENCE REPORT



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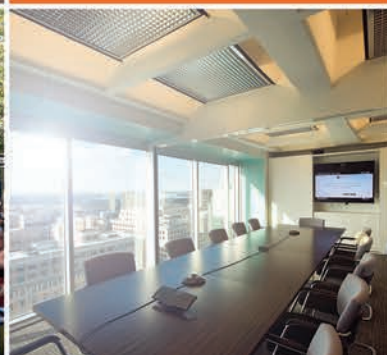


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In January Chemours reopened its newly renovated corporate headquarters in The DuPont Building, a 106-year-old registered historic landmark in downtown Wilmington.

Image courtesy of Chemours



A defense and space exploration safety technology firm's CEO. A three-term congressman who now serves as Delaware's 74th governor. A globally respected university leader. The president of a UAE-based port conglomerate. A construction executive with decades of experience.

All of the above spoke to Site Selection in order to help us deliver the clearest possible picture of Delaware's business climate. Their voices may sound like an echo chamber. But they're not following a script. They're just finding common ground.

"Because of our state's size, everybody has access to everybody else," non-profit coding boot camp Zip Code Wilmington co-founder Ben duPont (yes, he's related) told Site Selection Editor in Chief Mark Arend last year. "It's less partisan than other states. You can't be super partisan because you wouldn't get anything done."

Even when a company is consolidating, positive things happen when people want to get things done. Delaware won out over Pennsylvania when Astra and Zeneca needed an HQ location after merging in 2000, but staff numbers dwindled to around 1,500. "We had double the space we needed," Cory Matthews, head of real estate and asset strategy for

AstraZeneca, says of the four-building campus. His team's solution was a sale-leaseback strategy that has become a win-win for all parties. Now the remaining office has been "completely reinvented," he says, and a once-gated corporate campus is opening up into a mixed-use development now being shepherded through approvals by Delle Donne & Associates. "It's really a win-win," he says.

Rejuvenation like that is why many choose to stay put. After considering other potential locations, DuPont spinoff Chemours chose Wilmington.

"This is a place that our team can be proud to call home," said Chemours President and CEO Mark Vergnano at the newly reopened HQ in January. "Our renovated office is a perfect metaphor for Chemours — a company grounded in its legacy, but transforming into an agile, innovative, and collaborative enterprise with a bias for action and growth."

That metaphor works for Delaware too.

Adam Bruns, Managing Editor



Material Matters

One unique company's growth path shows the way forward for Delaware.

In the little town of Frederica, just south of Dover, sits the home base of one of the most compelling companies you've likely never heard of. ILC Dover — which started as International Latex Corporation in 1947 — develops, engineers and manufactures packaging and containment systems for the world's biggest pharma companies; rapid-deployment “tunnel plugs” for flood protection in subways; spacesuits for astronauts stretching back through all of NASA's Apollo missions; an airbag landing system for the 1997 Mars Pathfinder mission; and even the skin on commercial and military airships.

No wonder the company's slogan is “Beyond Boundaries.” But ILC likes the friendly confines of Delaware just fine.

“ILC Dover ended up in Frederica when one of the original owners ran out of space in the Dover facility, found this piece of farmland down here, and began building our current headquarters campus,” says CEO Fran DiNuzzo. Today

it's up to seven buildings, five of which are an interconnected blend of office space, engineering and manufacturing space of various types.

The demand for the company's pharma product lines is great enough that ILC will soon open a new facility in Ireland a couple miles from its first one there that will supply nearly all of Europe and a good portion of the Asia Pacific because “it's logistically easier to ship there from Europe than from the East Coast,” DiNuzzo explains. (Delaware officials might choose to marshal some data around that question.)

In addition to sales offices around the world, the company also maintains an engineering and business office near Johnson Space Center in Houston; a production facility in Juarez, Mexico; and an engineering and test facility in Rossens, Switzerland. But Delaware is the company's beating heart. For one thing, there's a whole bunch of square footage.

“Replicating this would be very expensive,” DiNuzzo says. “The attraction for us in Delaware

ILC Dover's amazing array of products has included spacesuits for NASA.
Photo courtesy of ILC Dover



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is it's a relatively easy place to do business. The small size is really valuable. I can call the governor, senators or congresswoman for help or to talk about something impactful like space technology ... I'm sure a company my size in larger states would have a hard time getting that audience."

He can call the universities too.

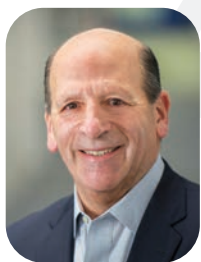
"We have a couple of research collaborations going on right now with the University of Delaware," he says. "They are strong in materials science, which is critical to what we are doing." ILC also participates in the school's "Spin In" program, launched in 2012, where small teams of undergrads spin in to work for companies on ideas, with the frequent result that they eventually spin out into new startups.

DiNuzzo says ILC also continues to work with Delaware State University via internships and with their business school, and with

"The tax situation is reasonable, and regulations are not burdensome, so as we need to do things here in terms of expansion and so forth, the state and local governments work with us while protecting their constituencies as needed," says DiNuzzo.

Today the Frederica campus is home to between 425 and 475 employees at any one time, among between 625 and 700 globally. "From a production labor perspective, I'd say we're still on an upswing in hiring right now," he says, and with increasing interest in some of ILC's commercial businesses, he's been building his engineering team over the past 18 months.

DiNuzzo likes what he sees in the formation of the Delaware Prosperity Partnership, the state's encouragement and development of entrepreneurial spaces, and growing partnership between land-grant universities and schools such as Del Tech. He says it's just another example of



We're 30 minutes from the beach and 45 minutes from Wilmington. You can buy a beach place and live in your retirement home while you're still working."

— Fran DiNuzzo, CEO, ILC Dover

Delaware Technical Community College (Del Tech) on workforce development, particularly in the technical trades. "They're always helping to articulate their curriculum to better meet the needs." Del Tech has four campuses in Wilmington, Dover, Georgetown and Stanton.

DiNuzzo says ILC continues to be attractive as an employer.

"We're a great alternative with very good and well-paying jobs and good benefits, in an area where the alternatives for some people are farming or the service industry. From a professional perspective, it's an affordable place to live, the school systems have improved in the last 10 or so years, and we're 30 minutes from the beach and 45 minutes from Wilmington. You can buy a beach place and live in your retirement home while you're still working."

'The Delaware Way'

DiNuzzo is not the only one who likes the central location next door to Philadelphia and midway between New York and D.C. But is it easy to navigate the state's bureaucracy?

the "Delaware Way."

"It's not unusual for parties to get together, collaborate and figure out how to figure it out," he says, contrasting the experience with his time working for HP in California and in Wilmington. "It's like moving mountains out there to do simple things. There were a lot of restrictions, rules and regulations that teams in California had to follow, and we had freedom here in Delaware to make good business decisions without those restrictions."

Where might the next business growth decision take the company?

"At the rate of growth of our pharmaceutical business, we'd hope to have our facility here and the Irish facility filled up in three years, and be looking for where our next production facility would be, whether expansion of existing, or in the Asia Pacific," DiNuzzo says. "We have a couple of businesses in our lighter-than-air, large-scale inflatables being looked at for a variety of different industries by our partners. If they come to fruition, we'd be looking for additional space, and most likely it would be here." ▼



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Photo of
Port of Wilmington
courtesy of Gulftainer

View From the Bridge:

A Conversation with the CEO of Gulftainer Group

Gulftainer, the UAE-based port management and 3PL logistics company with operations in six countries, describes CEO Peter Richards as a leader who runs a tight ship. It is not a metaphor.

The executive board member of Gulftainer, in addition to having 32 years of experience managing ports and container terminals, is a qualified Master Mariner with 12 years of seagoing experience. He is also CEO of Gulftainer's US arm, GT USA, which in September 2018 signed an historic agreement with the State of Delaware to operate the Port of Wilmington for 50 years and to build a massive new container terminal there. The deal is the largest investment ever by a private UAE company in the United States. GT USA will make annual royalty payments to the State of Delaware reaching an estimated \$13 million over the next decade.

Before the Delaware deal, the company signed a concession with the Canaveral Port Authority in Florida, marking its first venture in the United States.

Site Selection caught up with Richards in the Middle East in February.

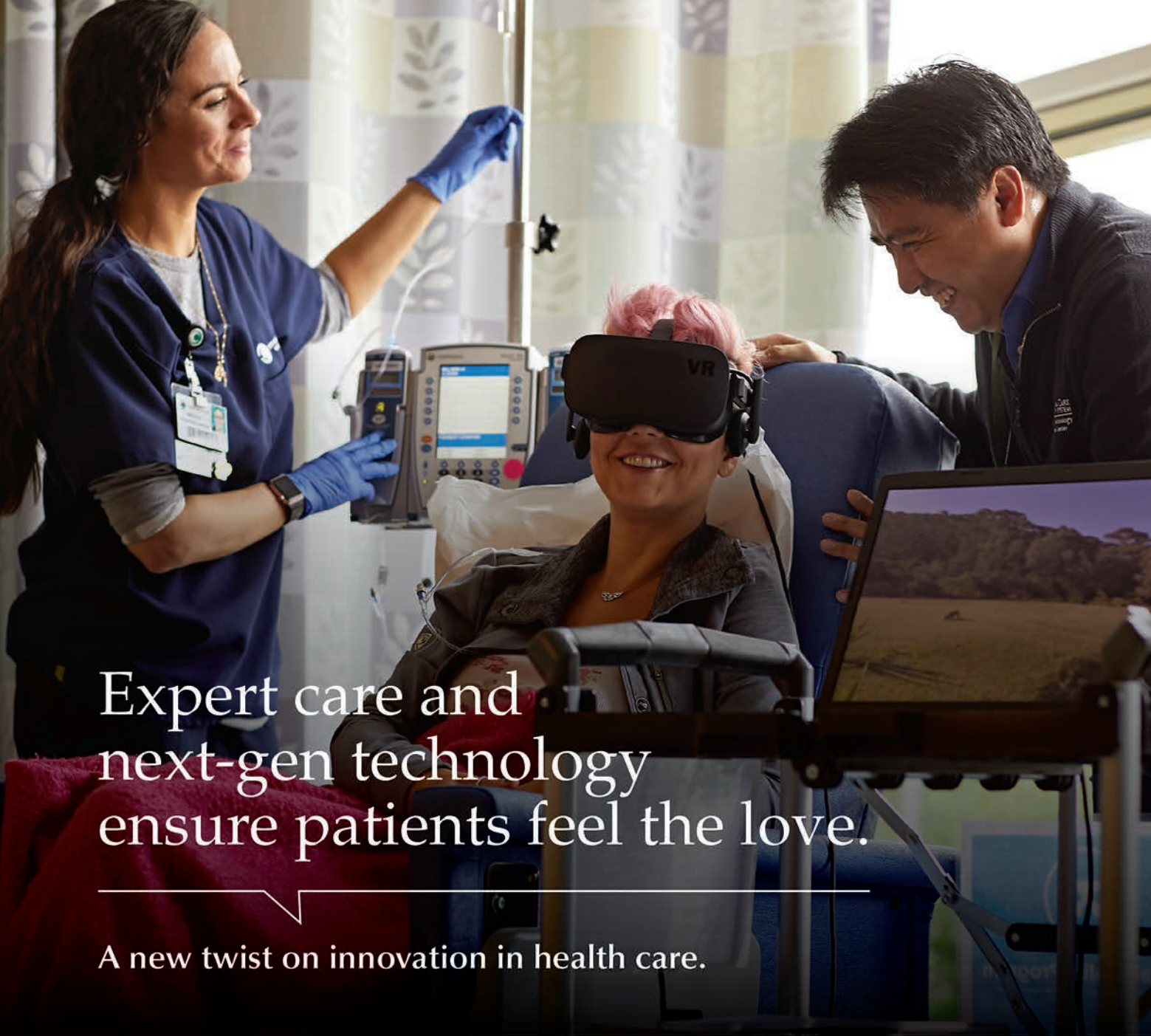
Site Selection: Describe Gulftainer's strategic approach to selecting port locations globally where the company wants to invest.

Peter Richards: What sets GT apart is that we look where we can partner and add value. We look where we can change practices, processes and procedures and make a difference. We get excited about projects where we can see we can make an impact quickly, and we saw that same excitement by the State in Delaware to develop their port facilities.

The State of Delaware is and has been proactive and eager to increase the throughput of the current port with additional container and other cargoes. The upgrade to the Port of Wilmington and the new dedicated container facility is expected to make a major impact in the improvement of the local economy of Delaware by increasing the amount of cargo flowing through the Port of Wilmington.

Walk us through the process that culminated in the choice of the Port of Wilmington.

Richards: Gulftainer had been reviewing potential ports of interest in the United States to support their growth strategy for several years. With the successful 35-year concession at Port Canaveral,



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Chemotherapy is an important tool in the fight against cancer, but chemotherapy treatments are hard on the body and soul. To ease the burden on cancer patients undergoing chemo, nurses at Christiana Care's Helen F. Graham Cancer Center & Research Institute and IT professionals at Christiana Care's Center for Health & Technology Innovation collaborated to develop a novel solution.

By adapting leading-edge virtual reality technology for use in a clinical environment, the Christiana Care team created a way for cancer patients to escape the infusion

suite and be transported to a sunny beach, a tranquil forest and other places that bring them peace and joy. The virtual reality experience has proven to decrease the anxiety that comes with receiving chemotherapy.

As a result of this innovation, Christiana Care was recognized with the prestigious 2018 Magnet® Prize from the American Nurses Credentialing Center (ANCC), an organization that promotes excellence in nursing and health care globally.

Gulftainer saw that as a successful mechanism to build their brand in the U.S. Wilmington was already on Gulftainer's list of ports with promise due to its strategic geography, diverse portfolio and strong labor environment. When the State of Delaware decided to enter a P3 [public-private partnership], Gulftainer applied. The initial letter of interest from the state brought back 90 potential suitors. The state then winnowed it down to about 25 or so, with Gulftainer still in the mix. After several reviews, the list was narrowed down to six. At this point, all interested parties had to put together a formal and specific proposal. Gulftainer was one of the top two entries. Significant vetting of the candidates at the federal, state, and municipal level occurred. After months of reviews, audits, including a CFIUS [Committee on Foreign Investment in the U.S.] review, agreement by

able to teach these skills not only to help GT staff to grow and develop, but hope that it will evolve to become a center of excellence to train people for other roles within the supply chain industry to continue to generate high-paying, sustainable jobs for the Delaware community and beyond.

How would you describe the general business climate in Delaware?

Richards: Wilmington and the State have been very collaborative. The geography — with immediate access to interstate transit without having to disturb residential areas, the rail service already established in Wilmington, and its location on the Delaware River — makes it a true “gem” of a Port. The permitting and regulatory requirements in Delaware are serious and need to be addressed



“We want to restore the Port as an important national cargo gateway, doubling cargoes, doubling revenue to the State, investing hundreds of millions of dollars and adding thousands of workers over the next decade.”

— Peter Richards, CEO, Gulftainer Group and GT USA, March 2018

labor to support, and unanimous voting by both houses of the Delaware legislature, Gulftainer was awarded the 50-year concession. This process took well over a year formally, with many more months of preparation before the formal bid. It was a thorough and somewhat taxing process in terms of dedication, but worth it.

The commitment to a training facility for logistics/port workers stands out as part of the deal. Is this the first time you've made such a commitment?

Richards: This isn't something that GT is just doing in Wilmington. We wholeheartedly believe in training — and continuous training — to allow people to develop throughout their careers in the company, and we do this in facilities around the world. We use local workers wherever we go, and in Delaware there is a lot of scope to modernize systems. We see enormous potential in the local workforce to upskill and lead the Port of Wilmington into a sustained technological transformation to achieve operational savings, operational excellence and cost leadership.

We want the new GT training academy to be

in a methodical and deliberate manner. We have the benefit of a cooperative state government that is willing to assist us in answering correctly all requirements. In addition, due to the state owning the land itself, they have a vested interest in getting it right the first time as well. This enables us to have frank discussions about how to proceed to meet all requirements without slowing progress.

What distinguishes the Port of Wilmington in terms of future opportunities in the crowded field of growing ports on the U.S. East and Gulf Coasts?

Richards: Its location. Being the first port on the Delaware River offers us a competitive advantage in that region. In addition, the advent of the 45-foot dredge so that larger, 14,500-TEU vessels can travel to our space allows us the benefit to service diverse customers that now utilize the enlarged Panama Canal as the throughway to the U.S. East Coast. Our connectivity to the U.S. interstate structure, our rail access and our lack of vehicle congestion also enable us to service a large swath of customers without the delays currently being noted in other U.S. East Coast ports. ▼



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A conversation with University of Delaware President Dennis Assanis

Bancroft Construction President and CEO Gregory Sawka says his company has been doing work for and with the University of Delaware for 40 years. Himself an MBA graduate from the university, he's seen the school evolve. Today, he says, "They're at a fantastic inflection point," and not only because of the school's Science, Technology and Advanced Research (STAR) Campus that has seen research-driven investments from the likes of Chemours. He says it begins with growth-oriented leadership, and that begins with Dr. Dennis Assanis, who was inaugurated as president of the university in late 2016.

"He sees the value of the partnerships the university can form with business and the community," Sawka says.

In a recent exchange with Site Selection Managing Editor Adam Bruns, Athens native Assanis said he looks to such institutions as his alma mater MIT, Stanford and the universities

in North Carolina's Research Triangle as models for how to be a catalyst for area economic development. The school's cross-disciplinary approach contributes to that ambition. UD's multidisciplinary programs include the new Data Science Institute, Biden Institute and biopharma initiative.

The following is an excerpt of our conversation with President Assanis.

Site Selection Managing Editor Adam Bruns:
Share a recent example of you and your UD colleagues having played a role in helping a company choose to land or expand in Delaware.

University of Delaware President Dennis Assanis:

There are many such examples. A good one is Chemours coming to UD's Science, Technology and Advanced Research (STAR) Campus. A DuPont spin-off, Chemours is based in Delaware and makes chemicals used in retail products and



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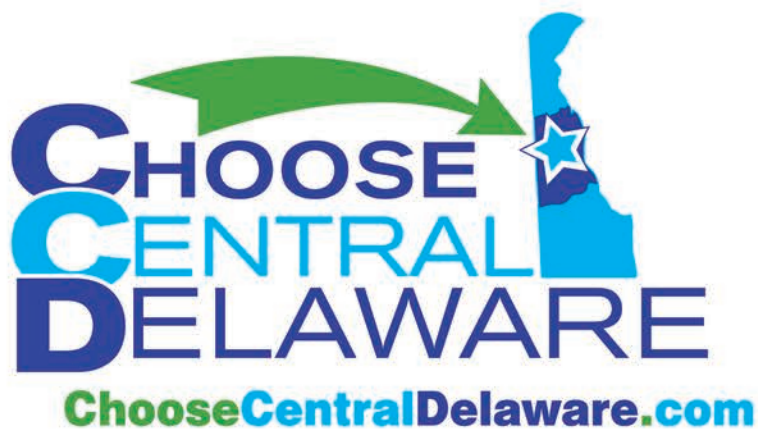
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industry. A few years ago, Chemours was looking for a new site for its research and development operation, and they considered several other states, including Connecticut and Pennsylvania. My team and I met with Chemours leadership to discuss and show them the unquestionable potential of locating at the STAR Campus, and they quickly realized that this was not only the best opportunity, but the most unique one. They'd have world-class access to UD students, researchers and a pipeline of innovation expertise and resources, as well as their own customers at a developing transportation hub strategically located in the mid-Atlantic region.

So right now, Chemours is building their \$150-million, 312,000-square-foot Discovery Hub on the STAR Campus. This is next to another facility that the University is building, the Ammon Pinizzotto Biopharmaceutical Innovation Center, which will house the headquarters of the National Institute of Innovation in Manufacturing Biopharmaceuticals (NIIMBL) as well as UD programs in

facing today. From engineering better medicines to advancing health informatics, from providing clean water to meeting our energy needs in an environmentally responsible and sustainable manner, and from securing cyberspace to advancing personalized and lifelong learning, UD is educating the workforce of the future to meet the needs of the state and the world. We are a particularly strong partner to our environmental and energy companies, chemicals and food-processing industries, health care providers, financial technologies and service industries, and many more.

While I obviously cannot say enough about engineering both as an industry and a staple of expertise at UD, I think it is also important to note that possibilities are strengthened by the modern approach to interdisciplinary education that is an instructional paradigm that UD takes quite seriously. Engineering fundamentals and specializations are no longer learned or practiced in isolation. They are pursued and developed in combination with other areas such as health



We see the STAR Campus as a dynamic and growing ecosystem for Delaware that will fuel unprecedented opportunities in business, learning and discovery to help drive our economy forward.”

— University of Delaware President Dennis Assanis

biotechnology and life sciences. Both buildings will open in 2020.

Chemours' decision to locate at the STAR Campus will help keep 330 research-related jobs in Delaware. It will also provide internship and research opportunities for UD students, create a job pipeline for our graduates and present unique collaboration opportunities for UD researchers.

If anyone knows what a good engineering talent base looks like, you do. Where do you see particular opportunities for UD's strengths in engineering?

Assanis: The engineering disciplines are evolving very rapidly, in concert with other disciplines, to address the grand challenges that our world is

sciences, energy, arts, agriculture, materials sciences, and so much more. This translates into endless opportunities for talent development and training that will have real impact on companies and the future of our state's economy on several levels — from job creation to innovation to problem-solving in our society.

Universities used to train for employment at companies. Today everyone wants to run their own company. What is your perspective on the role the university needs to play in the entrepreneurial economy?

Assanis: We believe everyone can learn to think and work like an entrepreneur, which is not the same thing as starting a business. Having an

entrepreneurial mindset means that our students recognize challenges and opportunities, then work to develop sustainable solutions. Those are incredibly valuable skills whether they're actually starting a company or just working at one.

As an example, we recently expanded UD's Horn Entrepreneurship Program from an embedded initiative in our business school to a campus-wide experiential education opportunity. Students who are specifically concentrated in certain colleges or fields of study (e.g., engineering, business, agriculture, health care, etc.) can take advantage of an interdisciplinary, University-wide program focused on innovation and entrepreneurship. The agile culture of the University and its offerings are strategically adaptive to the modern student who is still exploring creative choices for a career path.

How does UD encourage a) faculty innovation, and b) industry partnerships?

Assanis: We created our Office of Economic Innovation and Partnerships more than a decade ago to develop productive, long-term relationships built on UD's inventions and intellectual property. Instead of focusing on one-time licensing transactions — which had limited benefit to the university and a company — we now have a more engaging and interactive process that results in sustainable partnerships.

A good example is our partnership with the Nuvve Corporation. A UD researcher invented technology that lets electric cars store energy and later feed it back to the power

grid, providing energy-balancing services as more wind and solar energy comes online. Instead of just licensing it to Nuvve, we have embarked on a broad partnership with the company, which allows us to stay involved in the research, development and commercialization of this transformational technology.

Another example is our partnership with BASF, which involves a biofungicide that was invented at UD. It was licensed, developed and commercialized with BASF for use in many of its agricultural products.

These kinds of partnerships promote collaborative research and helps UD stay at the forefront of these critical developments.

How has UD's policy evolved in defining economic development as part of its mission?

Assanis: UD is a land-grant university, so a big part of our mission is to use our knowledge, research and resources to serve the public good. Clearly, economic development helps us achieve that mission, and it has always been a priority for me. Right after I was chosen as president of UD — even before I started the position — DuPont announced it was cutting about 1,700 jobs in Delaware. It was immediately clear to me that UD needed to respond to this challenge and help create a more innovative and entrepreneurial culture in Delaware. That's how we were able to move so quickly to develop our biopharmaceutical initiative (including securing NIIMBL here) and attract Chemours to the STAR Campus. UD is very proud that we have a \$4.7-billion economic impact in the Northeast region, supporting more than 33,000 jobs. ▼

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Photo of downtown Wilmington courtesy of Delaware Prosperity Partnership

Downfield Vision

For more than 30 years, John Carney has been quarterbacking policies to boost the prosperity of his fellow Delawareans.

Delaware Governor John Carney knows how to win, starting back in 1973 when he quarterbacked the St. Mark's High School team to the state championship, and followed that with a successful academic and athletic campaign during his time at Dartmouth. During three terms in Congress he supported the revitalization of American manufacturing through the "Make It In America" agenda and was a lead sponsor of the centerpiece of the Jumpstart our Businesses (JOBS) Act that made it easier for small- and medium-sized businesses to grow and create jobs. In previous roles under former Gov. (and then Senator) Tom Carper and former Senator Joe Biden, he helped Delaware earn its first ever AAA bond rating, played a key role in the state's purchase of the Port of Wilmington, and



worked to cut taxes nine times.

His efforts to build a championship economic development team include passage in June 2017 of legislation creating the public-private Delaware Prosperity Partnership to focus on attracting early-stage and technology-focused companies, recruitment of large employers and expansion of international business opportunities. Recent legislative measures he's championed include the state's Pay for Success incentive program, new Career Pathways programs at the high school level and the agreement to sell the Port of Wilmington to Gulfstream, where the company will develop a major container-handling complex.

Following are excerpts of his recent conversation with Site Selection Managing Editor Adam Bruns from his office in the state capital of Dover.

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Site Selection Managing Editor Adam Bruns: Walk us through your recent experience working with company leaders to retain or expand operations in Delaware.

Delaware Governor John Carney: As a small state, there is not a tremendous number of examples. But the best example to illustrate the advantage of being in Delaware is if you're large DuPont, the foundation of our economy for 200-plus years, you get First State attention. In fall 2015, leading up to the merger with Dow, part of their business spun out into Chemours, whose headquarters and operations Governor Jack Markell and the legislature worked hard to retain. Their CEO was a speaker this week at the Delaware state chamber of commerce dinner, and talked about their success, solidifying their presence in the old DuPont building. Senator Christopher Coons, Governor Markell, myself and other leaders came together to work with them to help rationalize their operations in Delaware. Our interest was in maximizing their employment. Long story short, they consolidated operations at Chestnut Run outside Wilmington, and also made the decision to change their sole tenancy at the DuPont Experimental Station.

As part of the Chemours decisions taking place, they were looking at Pennsylvania or other states, and the state legislature changed our corporate income tax structure from a three-part mechanism to a single factor. It was important for us to do that, because most states have moved to that anyway. We also worked with DuPont and the University of Delaware on the Delaware Innovation Space, which is now a multi-tenant research facility. That station has been a center of research an innovation for over 100 years for DuPont, and it has a bright future.

When a company is making changes, we get to work as a team. A great example that also involves locally elected officials in Wilmington is that DowDuPont will spin out again this spring into three companies — an ag company called Corteva Agriscience that will be headquartered at Chestnut Run, a specialty product company which will carry the DuPont name, and then the Dow material science business in Midland, Michigan. As part of that transition, they

were required by the EU to sell off some of their research facilities, so they sold off some lab space outside Newark. FMC bought those labs — the Stine half of the Stine-Haskell Research Center — and they've already moved 50 jobs or so down from New Jersey, with talk of more to come. That is the best example of the kind of attention you get. [The EU-driven deal also retained 600 jobs at the Stine site. —Ed.]

You were involved in the original purchase of the port by the state years ago, and now have negotiated the port concession agreement with Gulftainer, which required running a gauntlet of milestones before the signing last fall. Describe what the deal means for the state.

Gov. Carney: Yes, I led the team in that [original] transaction to purchase the port by the state. [Delaware Secretary of State] Jeff Bullock was the lead this time around. We did an RFP, and he did a tremendous job. One of our competitive advantages on the river and on the East Coast has been our labor leadership through the International Longshoremen's Association. Those guys have been on our side. A complicated partnership involves commitments to make investments in the current port facility, and deepening of the river to 45 feet, as a draft of 38 feet limits some of the cargo that can come to the port. Part of the deal involves a commitment to invest several hundred million dollars to develop a new container terminal at the old DuPont facility in Edgemoor just up the river from the existing port. That's probably the biggest part of this transaction — development of the port and the logistics that go with it.

We have a former GM manufacturing plant not too far away, repurchased by local ownership at Harvey, Hanna & Associates from Wangxiang America. They've been taking pieces down and looking for opportunities to repurpose it — there's a big railhead there that runs up beside the old plant.

There is a deep-pocketed investment from our new port partner, a UAE company — they have an operation in Port Canaveral. We're very excited about the potential,

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Peter Richards, Group CEO of Gultainer; Delaware Gov. John Carney; H.E. Yousef Al Otaiba, Ambassador of the United Arab Emirates to the United States; and Badr Jafar, Chairman of Gultainer's Executive Board, at the ceremony marking the Port of Wilmington concession agreement signing.
Photo courtesy of Gultainer

particularly about blue-collar jobs. And it will take off some financial burden off of Delaware, which has had to make investments over the past 20 years — investment which can now go toward other infrastructure.

A lot of corporate America, and a number of their site consultants, seem to think you have to be a right-to-work state to be pro-business. How do you respond?

Gov. Carney: You can be pro-business without being right-to-work. We've always had a very productive workforce, unionized and non-unionized. The reason our port has been as successful as it is, particularly with the fresh fruit business, is because of that workforce ... I tell people to look at the whole package in terms of cost,



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location, the personal attention you get, and the ability to act quickly and consistently to address business needs.

Opportunity Zones are on everyone's mind. Describe what they and other types of programs are doing to incentivize corporate investment.

Gov. Carney: In Dover and other towns there are opportunities through the Opportunity Zones program created by the tax reform bill. We have 25 of them, and they run the gamut from the riverfront in Wilmington — already a hot area — to where an old steel mill was taken down at a parcel just on the border with Pennsylvania — that site is really ready to pop, and we're excited to have those additional incentives from federal legislation. There's lots of opportunity on the riverside for more industrial development, maybe in conjunction with the natural gas industry over in Pennsylvania.

On I-495 and 95, there are real opportunities for office development and small business parks. We have a federal investment in a commuter train facility that will accept trains back from Philadelphia. Then we have sites that are a bit more risky. We have some old, underutilized Main Street-type places in the lower part of our state. There's an old nylon plant in Seaford in Sussex County, currently owned by INVISTA, where we're working to get an employer. And there's a shopping center site on the edge of Seaford. We're excited about the range of opportunities, and some that are already very active.

In 2017 we passed legislation I promoted that would make amendments to the Critical Zone Act allowing development in 14 abandoned industrial sites along the coast. The law prior to that made it impossible to redevelop those abandoned sites, so they were not being cleaned up or redeveloped. One of the parcels is adjacent to the PBF refinery [in Delaware City].

After not making the short list, you threw your support behind Philadelphia's finalist offer for Amazon HQ2 last January. Describe how you like to reach across state lines and partner with counterparts in Pennsylvania, New Jersey and Maryland.

Gov. Carney: No question about it, we always have. We had our own HQ2 proposed site,

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and used some of the assets of the City of Philadelphia to justify it. We're all Eagles, 76ers, Phillies and Flyers fans. A big Boeing facility in Ridley Park is about halfway between Wilmington and Philadelphia, and there are several Delawareans among the 6,000 working there. When I was in Congress I worked closely with partners over the line. In workforce, we not only talk about Delaware universities, but St. Joe's and LaSalle and all the Pennsylvania schools. We're in their media market, and part of Select Greater Philadelphia.

With New Jersey, we're in partnership with the Delaware Memorial Bridge, though in a bit of a dispute with the toll right now. But it supports our New Castle airport and airports in south Jersey. Dassault Falcon gets support from it, and they're looking to potentially expand. We have land around the airport. The Delaware River Port Authority is very important to that airport and to

its being an economic driver.

The Maryland connection is really more downstate, although there are connections near the city of Newark and UD, mostly with Gore, with facilities in Delaware and Maryland. FMC and the Stine-Haskell labs are just barely in Delaware — there are research collaboratives with the U.S. Army base at Aberdeen. Further downstate, there are significant connections in the poultry industry. Perdue is a Salisbury-based company with a lot of operations and chicken houses in Delaware.

What are you doing to attract foreign direct investment?

Gov. Carney: Delaware World Trade Center is active making connections. Notwithstanding our current trade difficulties, if you're going to be involved anywhere, you have to be involved

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“When you’re an elected official in Delaware, it’s pretty much a personal experience with your constituents.”

— Governor John Carney

with China. There is a lot of interest from China. We’ve had good trade shows and meetings in the UK and Germany. We do a lot of marketing of our corporate franchise overseas, and we have good connections in Israel. We have a lot of expatriate Africans living here, interested in connections on the continent of Africa — I think increasingly there will be opportunities there, and with GulfTainer running the show, there will be more opportunities. We ship a lot of big Suburbans and vehicles like that to the Middle East. It will be interesting to see what happens as the Panama Canal opens to the larger ships, and we want to be in that mix. That’s part of the rationale behind the GulfTainer partnership in the first place.

What are you hearing from various business leaders about the good or bad effects of tariffs?

Gov. Carney: I hear three things. I hear mostly from the farmers — I hear from them frequently anyway.



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When you're an elected official in Delaware, it's pretty much a personal experience with your constituents. I also hear from people building things that prices have gone way up for steel and aluminum — they're getting hammered pretty bad. Construction prices have gone up pretty significantly. I'm hopeful. We met with one of the lead people from China in the ag sector, who's developed a good relationship with our secretary of agriculture, who was undersecretary of agriculture in the Obama administration. Our friends from Korteva were there, interested in getting approval of genetically modified feeds in China. This guy had to make that decision, and he wanted to know from us what we thought about tariffs. There's interest on both sides to get that thing resolved quickly, so the decision on Korteva's new seeds could be made, and a whole new Chinese market could open up to them, and stop the negative impact on soy prices around the world.

Milken Institute's 2018 State Technology and Science Index in December ranked Delaware No. 7, up from No. 10 last year, citing such factors as the new high-tech R&D tax credit for small companies, the per-capita startup rate, and growth in VC investment. Describe your perspective on the power of small tech firms, and the importance of linking them to larger companies.

Gov. Carney: It's very exciting to see a lot of these small companies. We do things to encourage their development by funding coworking space, and have seen a number start up, particularly in the fintech area. In science and technology, for the same reasons, we're looking at different ways to help companies as they decide to take the results of their research, start a company and then grow. The University of Delaware is more important in that respect than ever before. Historically we were always able to rely

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on the DuPont Company for R&D and to employ scientists. Many were commercialized by DuPont, and many were taken outside the company. Incyte — one of the companies at the Delaware Innovation Space — came out of DuPont pharma. They have about 500 people now, and they want to expand to almost double that.

We have a lot of people with advanced degrees. Some were left without positions in the Dow Dupont merger, and we're trying to help them land in research organizations like Adesis, which does contract research. We've always been a science and technology-based state, and we have a very high percentage of Delawareans, and people who live right over the line in Pennsylvania, in the sector ... The key thing is to create a place entrepreneurs want to be, a place that's fun and where there's cool stuff to do, like at the riverfront, where the Philadelphia 76ers brought their development league team and where we have a minor league ballpark. As a small city in a small state, we have to compete for that kind of talent, and punch above our weight.

You wrote an op-ed in October after helping launch the "It's Time" campaign in Wilmington to encourage renewal and redevelopment.

Describe how your team supports Delaware's cities as they compete to attract talent, global corporate investment and federal infrastructure investment.

Gov. Carney: Wilmington is a small city but the only real city we have. We are partnering with Wilmington to make the city cleaner and safer. There are interesting places to live and to be down on the riverfront. There are now well over 1,000 living in a development in what was an abandoned old shipbuilding area. We incentivized that development through our Downtown Development Districts program. One key is IT talent, with Bank of America, JPMorgan Chase, Capital One — they're basically technology companies disguised as banks. Zip Code Wilmington is a training program that does a tremendous job taking talented people in their 20s and training them. Coworking spaces are important. We make big investments with our federal dollars in transportation infrastructure, using the funding to create sites on the river. We're building a bridge from one side of the Christina River to the other, across from the minor league park, and a bike trail from the riverfront out to our old colonial capital of New Castle. That kind of fun stuff attracts young tech talent to an area. ▼

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The array of site certification available to regions today includes a number of groundbreaking programs. They can be led by utilities and railroads such as TVA, AEP, CSX, BNSF, Southern Company and Entergy. They are championed by states and provinces including Iowa, South Carolina, Ohio, Indiana, Tennessee, Missouri, Oregon, Wisconsin and Ontario. And they're vouchsafed by consultancies such as Austin Consulting and Olsson Associates whose expertise lends such programs credence when it comes to geotechnical, infrastructure and other checklist items.

Meanwhile, there's a well-known and

entirely different certification program that continues to build a global portfolio: the U.S. Green Building Council's LEED green building rating system. LEED buildings now number in the tens of thousands worldwide, with a number of various categories, and now the USGBC's program portfolio also includes programs addressing sites and communities. In some cases, it may behoove corporate end user, development and government leaders to have such certified green projects in close proximity to sites otherwise certified for immediate development.

Administered by Green Business Certification Inc. (GBCI), the Sustainable SITES Initiative (SITES®), a complement to LEED, is a comprehensive program for

Is your site environment- and wellness-ready too?

by ADAM BRUNS
adam.bruns@siteselection.com

Novus International's headquarters in St. Charles, Missouri, is one of 56 projects certified by the Sustainable SITES Initiative.

Photo courtesy of Novus

(Continued on page 228)

Seal-Rite Move Highlights Wisconsin's Thriving Manufacturing Industry

Wisconsin's broad and diverse manufacturing sector is welcoming a new member thanks to Seal-Rite Door's plan to relocate operations from Rockford, Illinois, to Beloit, Wisconsin.

Seal-Rite, a subsidiary of Palmer-Donavin Manufacturing Co., will open and operate a 105,000-square-foot site in phase two of Rock County's 28-acre Wisconsin Stateline Industrial Park, which was developed by Hendricks Commercial Properties and constructed by Corporate Contractors Inc. The park can accommodate multiple buildings, offering more than 400,000 square feet of industrial space with easy access and visibility to Interstate 39/90.

Seal-Rite Door plans to relocate operations from Rockford, Illinois, to Beloit, Wisconsin, and will open and operate a 105,000-square-foot site in the 28-acre Wisconsin Stateline Industrial Park.



The new \$16 million facility will give Seal-Rite the opportunity to implement the latest equipment, increase efficiency, improve overall production and position itself for future growth — capabilities that are unavailable at its current manufacturing site.

Exclusive product lines to be made in Wisconsin

The state-of-the-art plant will house the rapidly growing company's design and manufacturing operations for its high-performance residential doors, which includes the Therma-Tru line. Seal-Rite, established in 1981, is noted for its high-performance and custom door products. It was acquired in 2013 as a wholly owned subsidiary of Columbus, Ohio-based Palmer-Donavin Holdings Inc., an

employee-owned, leading wholesale distributor of residential building materials in the Midwest that was established in 1907.

In addition to Therma-Tru, Seal-Rite's exclusive product lines include SR Finishing System, GM Wood and Frontline, all of which are highly detailed and pre-finished by hand. Its Seal-Rite Finishing System includes 30 paint and 10 stain colors, as well as custom paint-color matching.

"We welcome Seal-Rite Door to Wisconsin and thank the company for its decision to expand its operations in our state," said Mark R. Hogan, secretary and CEO of the Wisconsin Economic Development Corporation (WEDC). "This is another example of companies from

around the country — and around the world — that are choosing to locate in Wisconsin because of our strong business climate and dedicated workforce."

Initial jobs expected to spur additional hiring

Seal-Rite has promised to bring 80 jobs to Wisconsin as part of the expansion plan, which was supported by a WEDC award of up to \$250,000 in state tax credits over the next three years. The actual amount of credits the company will receive is contingent upon the number of jobs created in Wisconsin during that period.

In addition to those initial jobs, a WEDC economic modeling study estimates the project could indirectly generate 81 additional

jobs in the region. Those 165 total new jobs are expected to generate about \$1.4 million in state income tax revenue over a five-year period. Since 2016, WEDC has awarded more than \$31 million in awards in Rock County, including \$10.8 million to area businesses for projects expected to create nearly 1,400 jobs.

"Our new location will benefit our business and the customers we serve, as well as provide us with the opportunity to expand our pre-finished door business using the latest technology to further enhance the quality of our products," said Ron Calhoun, president and CEO of Palmer-Donavin. "This is a significant milestone for the future of Seal-Rite, and we look forward to our success and continued growth in Beloit."

Community leaders hail relocation plans

"The City of Beloit is delighted that Seal-Rite Door has chosen Beloit to be its new home base for manufacturing in the Stateline area," said City Manager Lori Curtis Luther. "Seal-Rite Door is a welcome addition to Beloit's strong industrial base, and we appreciate the company's investment and commitment to creating jobs in our community."

"Strategic real estate investments, coupled with public-private sector partnerships and supply chain considerations, are the foundational elements that are continuously fueling the Janesville-Beloit economy," added James Otterstein, economic development manager with the Rock County Development Alliance.

"Seal-Rite's decision highlights the demand for high-quality, Class A industrial buildings in the area," noted Rob Gerbitz, president and CEO of Hendricks Commercial Properties. "We are delighted that reputable companies like Seal-Rite and Palmer-Donavin will be a part of our growing manufacturing community."

More information about Wisconsin's business development resources can be found at InWisconsin.com.

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IN A WORKER-FRIENDLY COMMUNITY?



In Wisconsin®, we can. When Canada's The Little Potato Company was looking to build its first facility in the U.S., DeForest, Wisconsin, was a natural fit. Using WEDC's Certified Sites Program, we helped them find a development-ready site in a place where they could find employees who shared their company's values of family and community. Just think what we could make happen for your business. See the whole story at WEDC.org/success-stories-lpc.



Beyond Expectations

Often mischaracterized as a fly-over state, Iowa has become one of the Midwest's top-ranked development hubs

By Debi Durham, Director, Iowa Economic Development Authority

Despite the misconceptions, our state's leadership and its workforce have been tirelessly dedicated to making Iowa what it is today — the #1 state in the nation as ranked by U.S. News & World Report (2018).

Though we're grateful for the honor, it's no accident. At all levels across the public and private sectors, Iowa remains committed to continuing its upward trend, fostering an environment where businesses can succeed within our borders and achieve sustained growth.

Why Iowa?

It's a great question and one those of us on the front lines of economic development in the state are always eager to answer. Though there are a variety of factors that make our state a best-in-class destination for businesses, a few are particularly noteworthy:

Pro-business regulatory environment: Businesses in Iowa have benefited from a low cost of doing business, tax incentives and continued support from a responsive state government.

Skilled and stable workforce: Public and private entities throughout the state have invested in offering apprenticeships, internships and other professional development opportunities to our labor force to close the skills gap.

Access and infrastructure: Iowa's central location provides a transportation infrastructure that can support a wide array of needs in an efficient and cost-effective manner.

Designating Development-Ready Sites

With the aforementioned components firmly in place, ensuring the availability of suitable and low-risk development sites across Iowa inspired the launch of Iowa's Certified Sites Program which offers more than 20 shovel-ready sites throughout the state.

The program mirrors a typical site location process, but due diligence is completed in advance to streamline the site selection process. Any issues identified during certification are mitigated, making the various categories of sites (including green business parks, mega sites and industrial sites) ready for immediate development. The program's success in connecting businesses to suitable sites is one reason that Iowa earned the #5 ranking in Site Selection Magazine's Top 10 States in Projects by Capita.

For a comprehensive list of available sites as well as more information about the program and surprising facts about Iowa, visit iowaeconomicdevelopment.com. We welcome anyone who would love to grow with us.

(Continued from page 225)

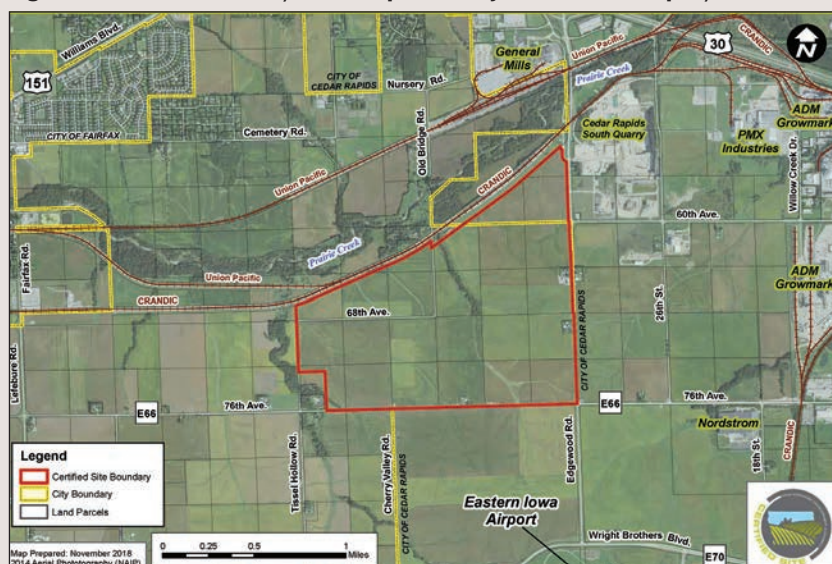
designing, developing and maintaining sustainable landscapes. The program was developed through collaboration by the American Society of Landscape Architects (ASLA), the Lady Bird Johnson Wildflower Center at The University of Texas at Austin and the U.S. Botanic Garden. GBCI acquired SITES in 2015.

"Using the SITES rating system," the USGBC explains, "projects are planned, designed and developed in a way that protects and enhances the benefits people derive from healthy, functioning landscapes through practices, such as carbon storage, crop pollination and flood mitigation."

SITES can be applied to just about any project, anywhere in the world, on sites with or without buildings — from corporate campuses to streetscapes to public parks. As of March 2018, nearly 120 projects and nearly 98 million gross sq. ft. of space across 35 states and eight countries had registered or certified with SITES. The latest website update features 56 certified projects, including animal health and nutrition company Novus International's headquarters in St. Charles, Missouri, outside St. Louis; the Tuthill corporate campus in Burr Ridge, Illinois (designed two years before LEED even existed); HELIX Environmental Planning's HQ in La Mesa, California; the "HP Inc." campus in Boise, Idaho (now occupied by state employees since the state's purchase of the property in 2016); and Green Wise's HQ in the Tama District of Tokyo (the first project outside of the United States to achieve SITES certification).

Another layer of certification joined the USGBC's universe in November, when the organization announced that the STAR Community Rating System, which offers certification for sustainable communities, will be fully integrated into USGBC's LEED for Cities and LEED for Communities programs. The 75 cities and communities that have achieved STAR certification (Columbia, South Carolina, most recently) and the 20 additional cities and communities that are

Big Cedar Industrial Center: 1,391 development-ready acres in Cedar Rapids, Iowa.



seeking STAR certification will now be part of the LEED network.

“Integrating the STAR Community Rating System into LEED for Cities and LEED for Communities, will bring us closer to our goal of advancing sustainable cities and communities around the world,” said Mahesh Ramanujam, president & CEO, USGBC. “We are helping cities develop responsible, sustainable and specific plans for energy, water, waste, transportation and many other factors that contribute to raising the standard of living for all people around the world.”

LEED Marches On

The USGBC in February announced its top 10 non-U.S. countries for LEED-certified space. Mainland China led the way with 1,494 projects encompassing more than 68 million gross square meters of space (732 million sq. ft.). No. 2 Canada had the most projects, at 3,254, accounting for 46.8 million sq. m. (503.7 million sq. ft.). They were followed by India, Brazil, South Korea and Turkey, in that order. LEED now has 96,275 registered and certified projects in more than 167 countries and territories.

The organization also announced its top 10 LEED states, based on LEED-certified square feet per person. Illinois was No. 1, followed by Massachusetts, New York, Washington and Texas. “Despite Washington, D.C. not appearing in the official Top 10 list because of its status as a federal territory, it has consistently led the nation and in 2018 certified 61.74 square feet of space per resident across 145 green building projects,” the USGBC stated. “The nation’s capital has a strong legacy of sustainability leadership and in 2017 was the first city in the world to be LEED-certified.”

Nine of the top 10 states are also home to LEED-certified cities and communities, including Chicago, Seattle, Austin, San Diego County and more. There are currently more than 137 registered and certified LEED cities and communities around the world, representing more than 50 million people.



Looking to build a new facility? Iowa’s Certified Site Program designates development-ready locations with site-related data and documentation assembled up front, and access to interactive infrastructure maps. Our construction fees, rental rates and overall costs of doing business are well below the national average. All this in the state ranked best by *U.S. News & World Report*. Iowa is ready for you.



iowaeconomicdevelopment.com/CertifiedSites



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www.InvestInOntario.com/CertifiedSite



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