



Texas Competitiveness

Tom Stellman, President & CEO

TIP Strategies

September 5, 2012

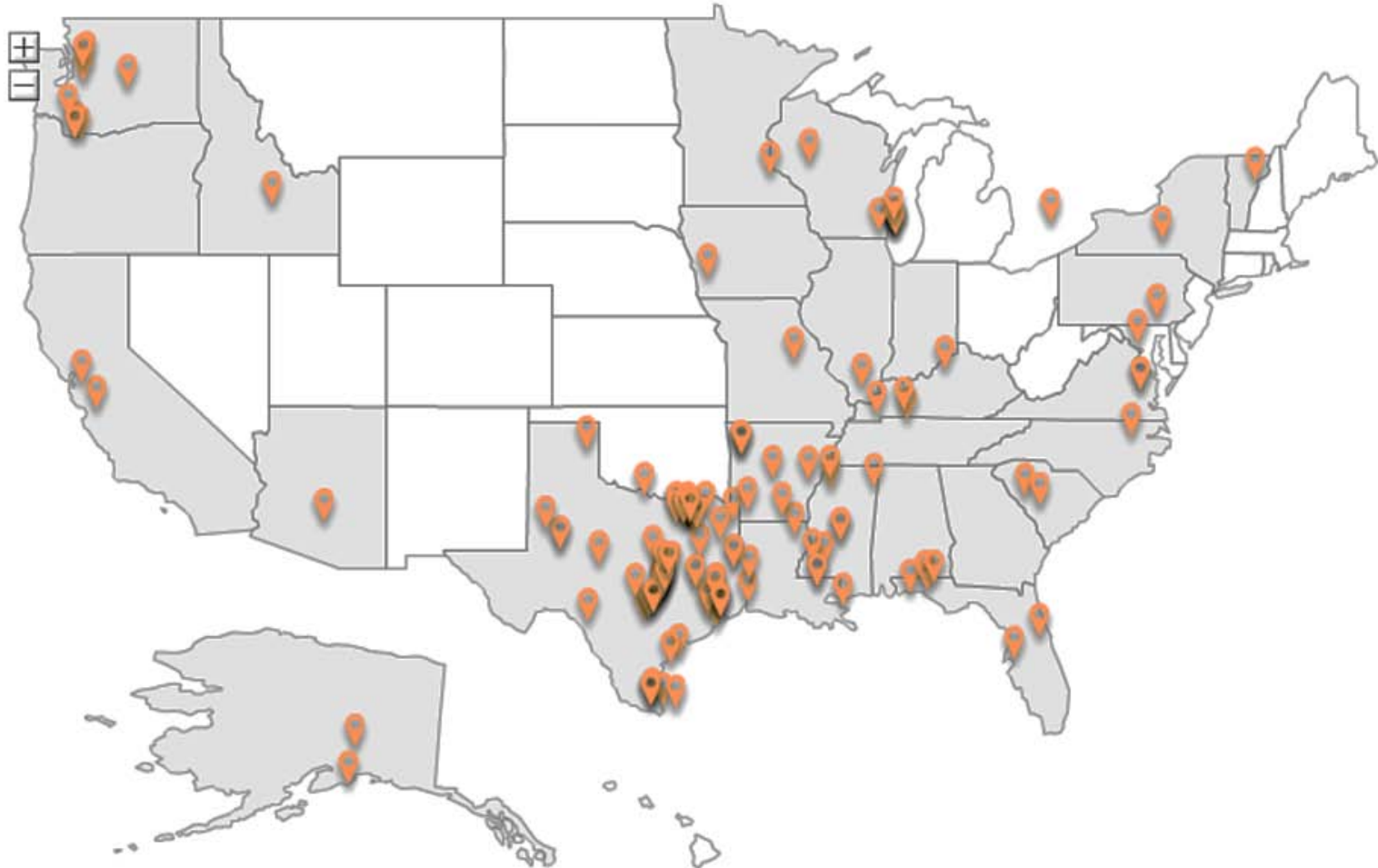
About us



- Founded in 1995
- Based in Austin, TX
- Expertise: economic & workforce development strategic planning

Our Work

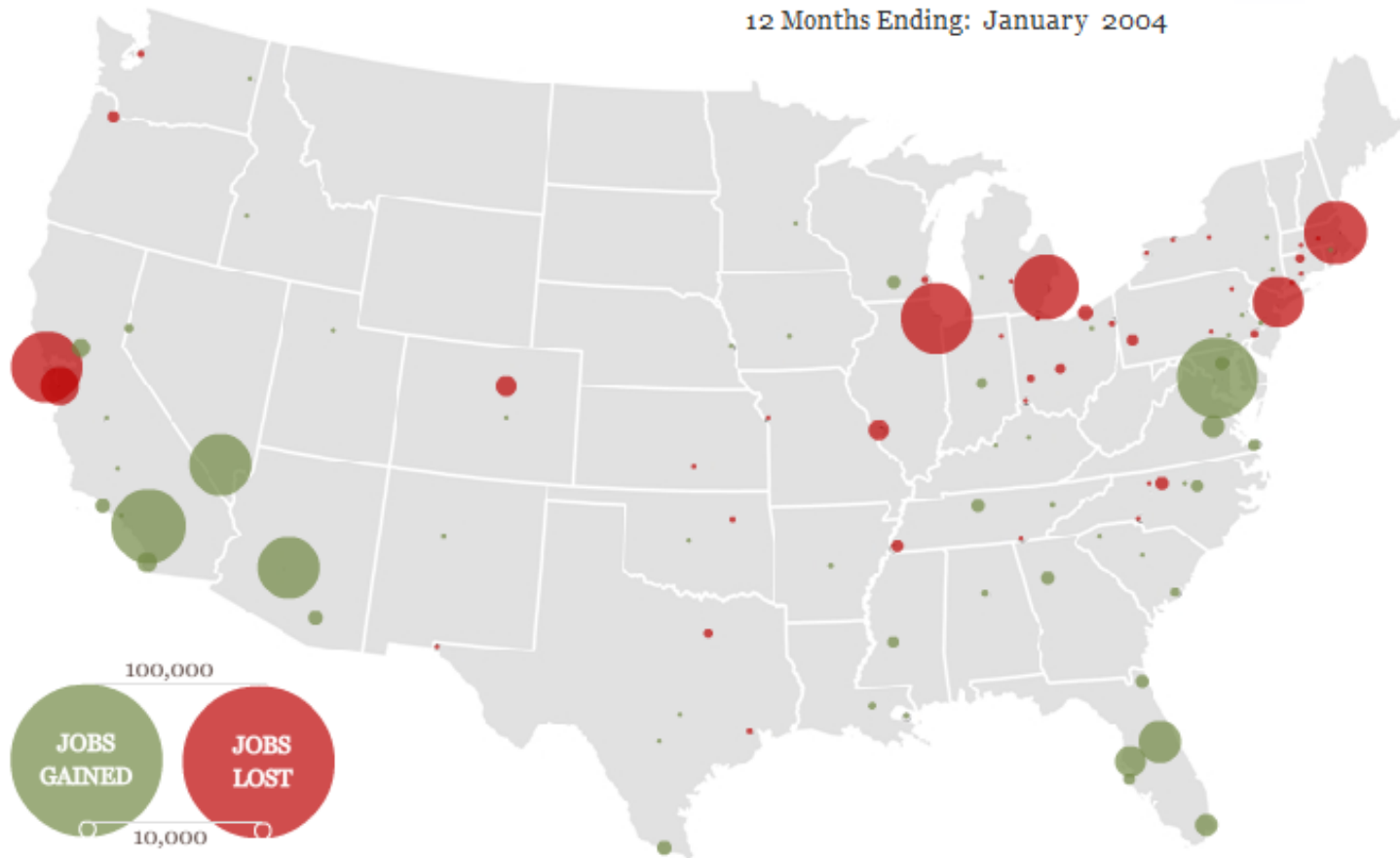
We have 17 years of experience in over 100 different communities.



The Geography of Jobs



Net Job Gains / Losses by Metropolitan Statistical Area,
12 Months Ending: January 2004

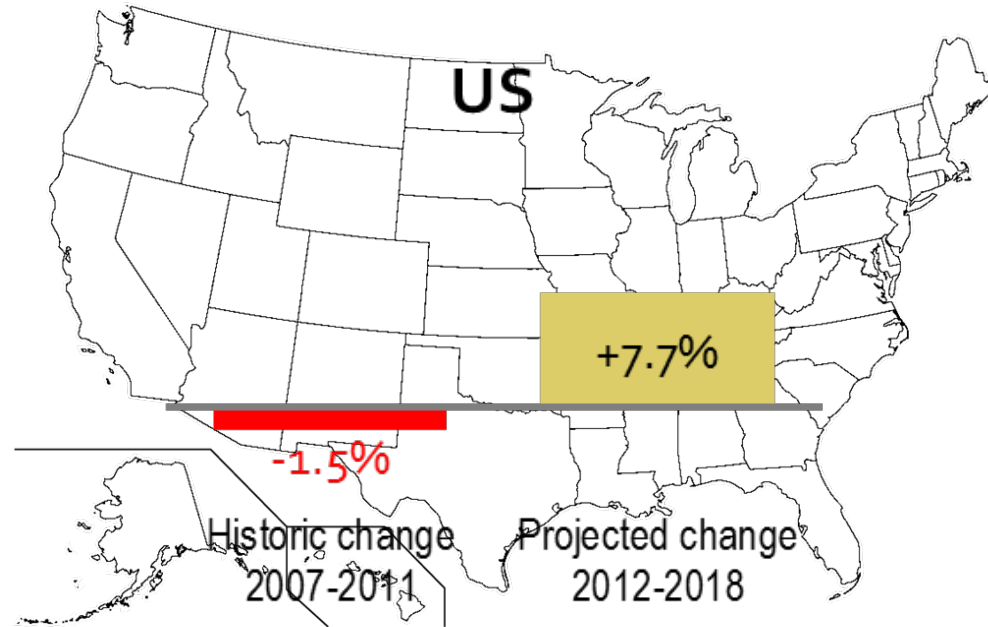
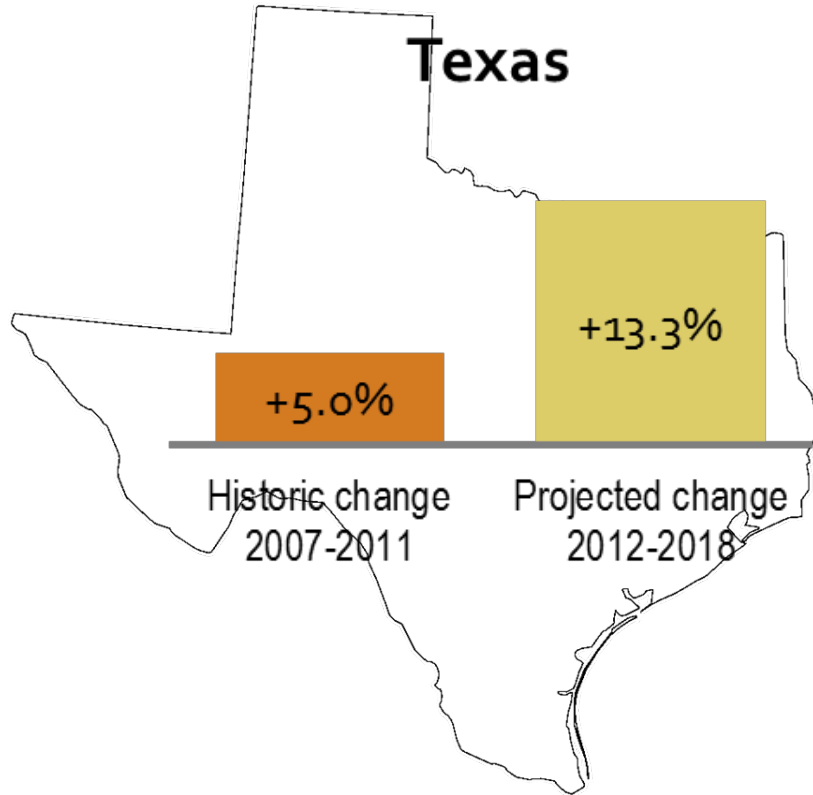


Note: Top 100 Metropolitan Statistical Areas in the contiguous United States based on number of jobs as of December 2008

Source: BLS and state labor agencies (via Moody's Analytics), TIP Strategies

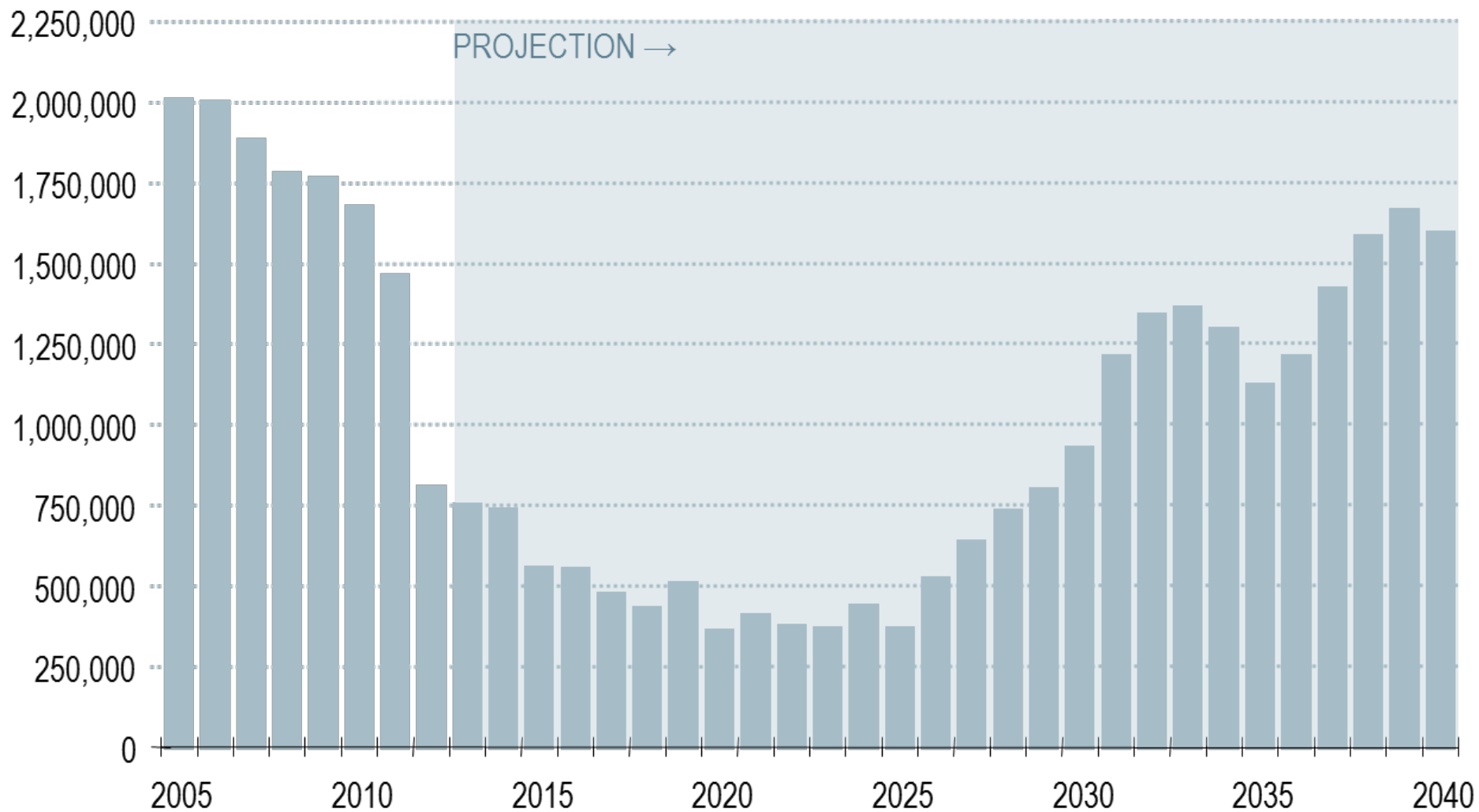
Total employment

Historic (2007-2011) and projected (2012-2018) change



GROWTH OF THE U.S. WORKING AGE POPULATION

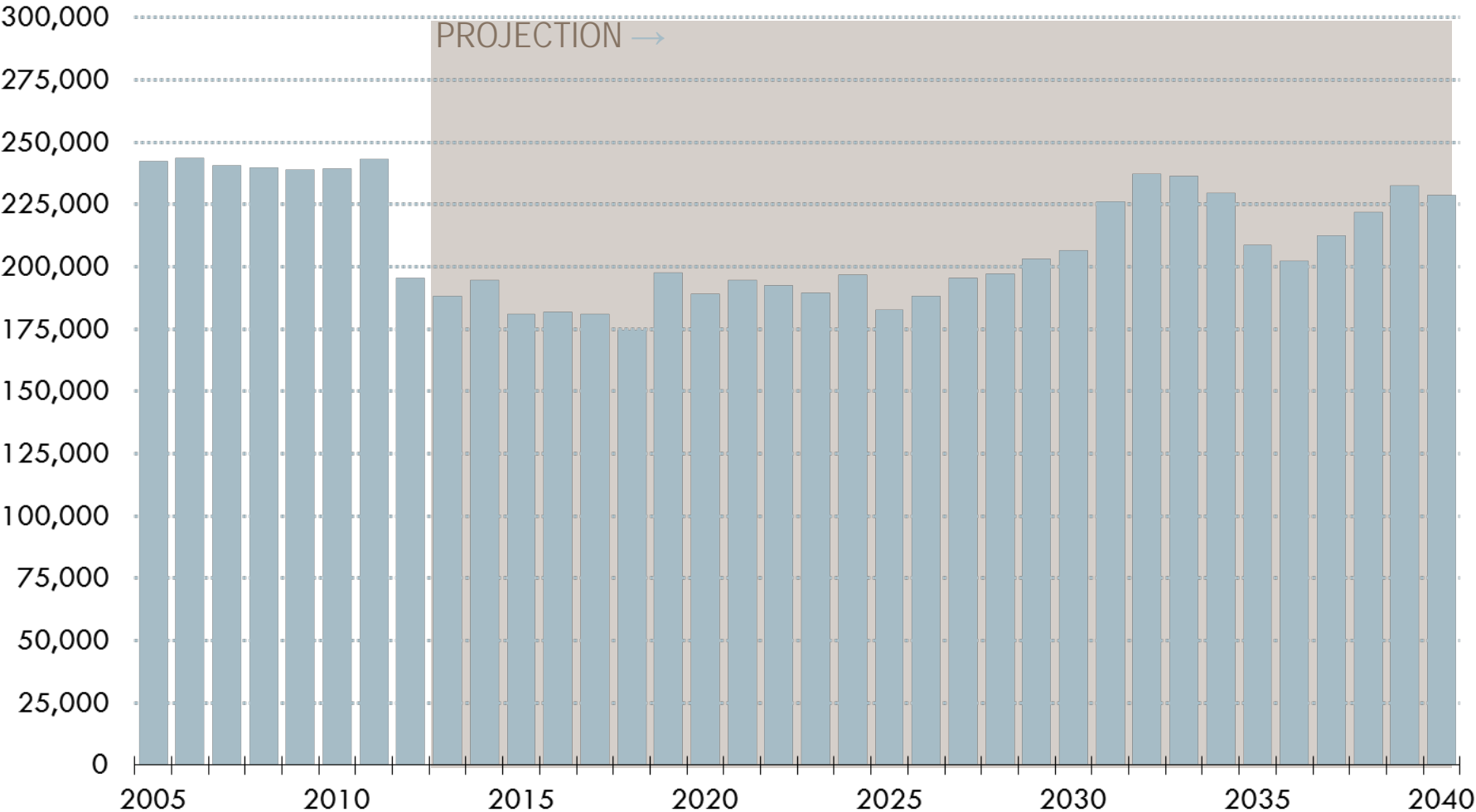
Projected net annual change for the US population age 18-64



Sources: TIP Strategies; U.S. Census Bureau

GROWTH OF THE TEXAS WORKING AGE POPULATION

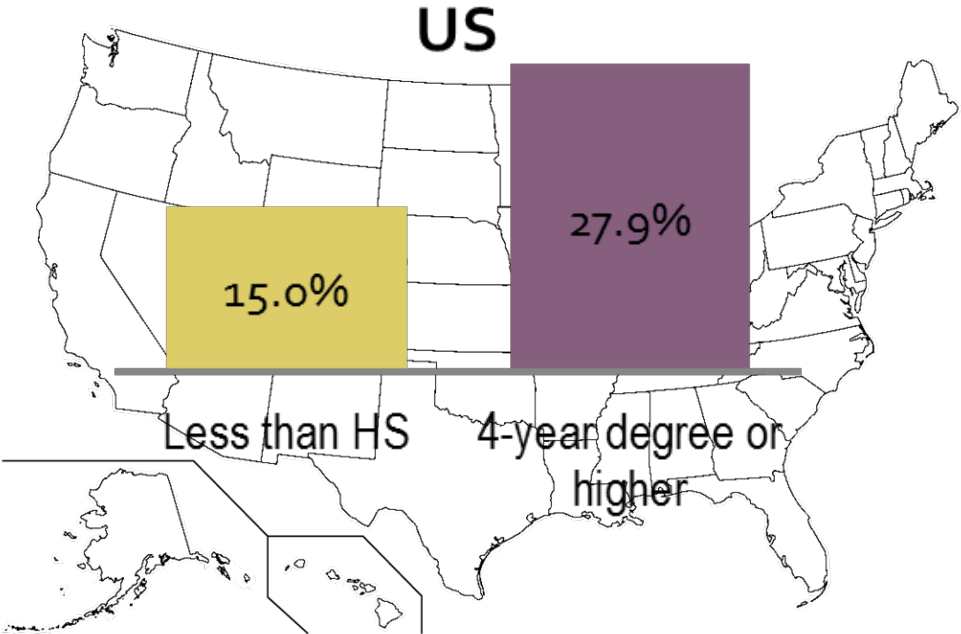
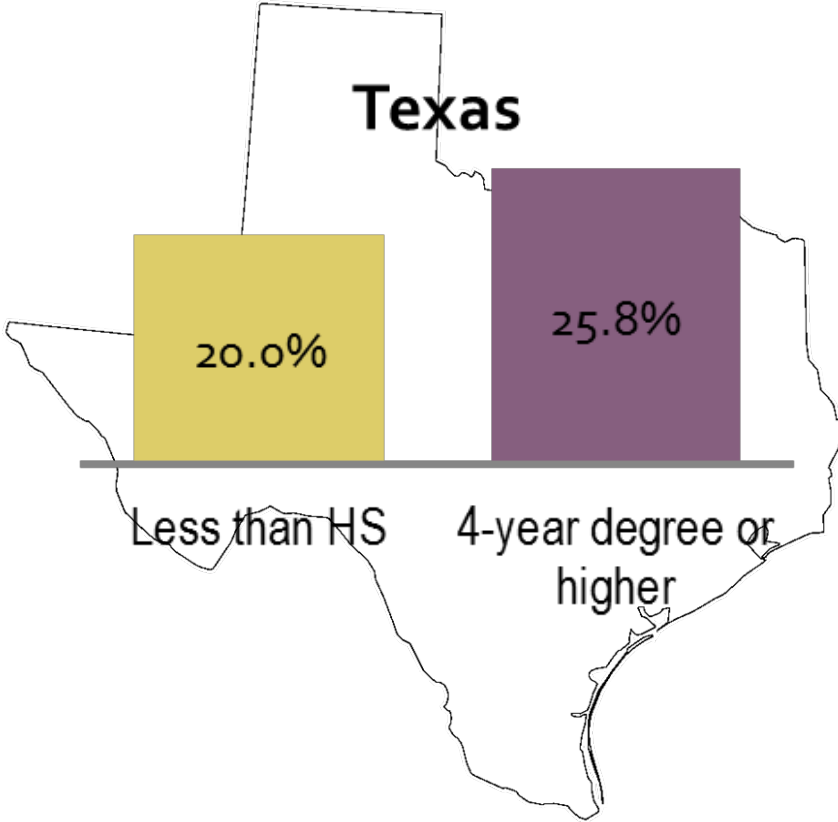
Projected net annual change for the Texas population age 18-64



Sources: TIP Strategies; Texas State Data Center (0.5 migration scenario)

Educational attainment

Share of the population 25 years and older



Source: U.S. Census Bureau, American Community Survey, 5-year estimates

Keeping Texas Competitive

- International competition

- Foreign investment projects driven by:

- Corporate strategy (market access, etc.)

- Exchange rates

- Talent

- U.S. states generally don't compete with other countries for foreign investment, they compete with other states

Keeping Texas Competitive

- Interstate competition
 - Tax base:
 - Income
 - Property
 - Sales
 - Other factors (regulatory climate, utility cost, labor climate, etc.)

Keeping Texas Competitive

- Balancing tools & infrastructure
 - Incentives
 - Other factors
 - regulatory climate
 - utility cost
 - labor climate
 - workforce skills

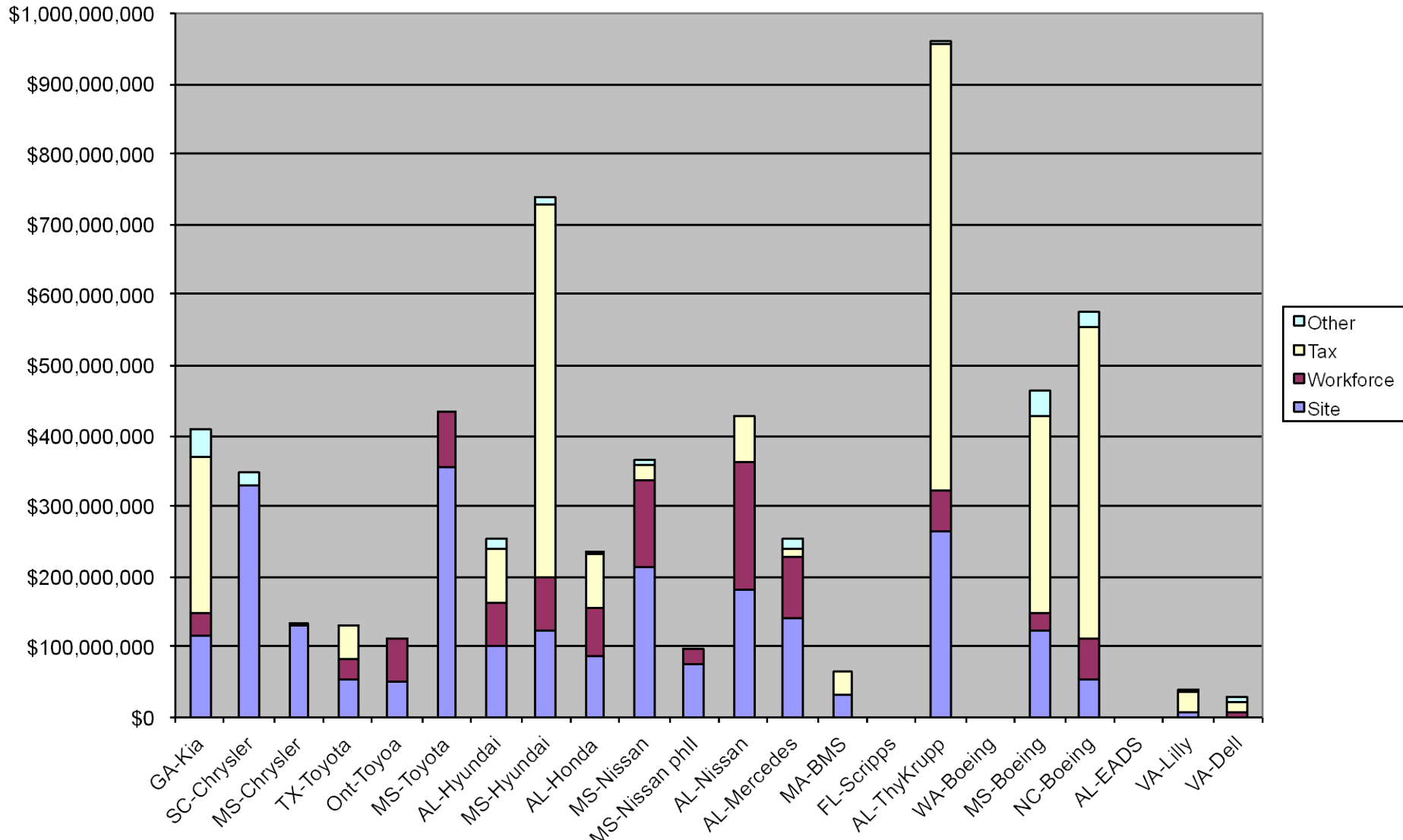
Hundreds of Megasites in U.S.

STATE

State	Nearest City or City	Site Name	Acreage	Notes	Contact
LA	Laurinburg	Laurinburg-Maxton Airport Ind. Park	2,000	Former Army Air Corps Base Training Facility, now zoned	Lifany McNeil, 919-733-4977
MI	Muskegon	Muskegon/Wastewater	2,400	regional disposal facility; targeting biomass, dairy,	Jim Edmondson, 231-724-3172
FL	Panama City	West Bay Sector	4,000	Adj. to new airport under construction; sector plan calls for	Rod Wilson, 850-231-6550
AL	Alabama	Alabama			
AL	Atlasta	Linestone Co. I-65/Hwy 31	2,010	possible dual rail; no zoning required; 2 private owners; fronts I-65 in Huntsville MSA; certified under the TVA-sponsored megasite program; \$30,200/acre, down from \$46K a year ago.	Tom Hill, 256-232-2336
AL	Pryor I-65		1,323	Possible interstate access for a mega project. Possible dual rail service from CSX & Norfolk Southern.	www.edpa.org
AL	Bay Minette	Copper Station Airport site	1,581	forested; \$25K/acre negotiable.	www.edpa.org
AL	Joe Hill Tract		2,457	no services to property yet; \$3,650/acre neg.	www.edpa.org
AL	Logan site		1,400	power and fiber optic to site; geotech report; CSX adjacent.	www.edpa.org
AL	Copper Station I-65 site		1,900	\$2.5M/acre; forest; utilities available; zoned light industrial	www.edpa.org
AL	Crossroads of America site		1,240	No zoning; 1 mi. from I-55/I-20 interchange; located in a state favored Geographic Area and within a Renewal Community; \$10,000/acre negotiable; AEG Railroad Co. spur Birmingham-Hoover MSA; ag zoning; \$8K/acre; 1 mi. to I-65	www.edpa.org
AL	Calera	Shelby Co. Megasite	1,539	large water capability; two AEs. Power substations on site;	www.edpa.org
AL	Childersburg	Childersburg Industrial Park	2,001	dual rail, but spur removed; sewer installed in portion of park; new access road coming in 2009; under public ownership; within an Enterprise Zone.	L. Calvin Miller, 256-246-8332
AL	Citronelle	County Rd. 411-65	1,900	forested; 14 mi. to I-65; Mobile MSA; \$6,500/acre neg.	www.edpa.org
AL	Creola	Creola Mobile River #1-65	1,000	Mobile MSA; forested site on last undeveloped high bluff north of Mobile; 1 mi. to I-65; red clay soil on much of property; sewer coming in 2009, but no natural gas; \$12K/acre neg.	www.edpa.org
AL	Decatur	Hwy. 201-65 North Site	1,483	Huntsville MSA; ag zoning; dual rail; gas more than 1 mi. from site; under 5 mi. to port on Tenn. River; \$9K/acre neg.	www.edpa.org
AL	Huntsville	Sewell Site	1,322	Ag zoning; NS rail and gas w/in 1 mi.; \$25K/acre neg.	Tom Hill, 256-232-2336
AL	Loxley	Golden Triangle	2,718	1 mile to I-10; all utilities in place; currently a Planned Unit Development but owners willing to rezone all to commercial/ind. at the request of a large user; \$25K/acre	Steve Fennell, 256-535-2008
AL	Magnolia North		15,114	forested site; 1.00 and Magnolia Farms; 5.5 miles of I-30 frontage; active AEG railroad; Perdida River frontage; existing private Interstate overpass; wetlands delineation and Phase 1 ESA available; \$30,400/acre neg.; subdivision possible.	www.edpa.org
AL	North Courtland	Hood Harris	1,000	Ag zoning; just west of Intl. Paper property; power, but no other utilities; Decatur MSA; NS rail w/in 1 mi.; on Tenn. River; no dock; \$15K/acre neg.	www.edpa.org
AL	Opyelka	NE Opyelka Industrial Park	1,092	partially cleared; dual electric; rail	Al Cook, 204-765-5114
AL	Trinity	Maldard Fox West	1,251	Decatur MSA; NS rail onto site; utilities not yet in place; all reports available; IDB owns 232 acres; \$30K/acre	www.edpa.org
AL	Winfield	Black Creek Megasite	1,800	Portions of site in cities of Winfield and Brilliant; NS and BNSF rail; all utilities in place, including dual electric (co-op); intersection of State Highway 129 and US 78 (Future I-22 Corridor); \$10K/acre; \$1K/acre lease.	www.edpa.org
AR	Arkansas	Arkansas			
AR	Carlisle	Carlisle I-40 Industrial Site	1,325	Entergy Select Site; 34 mi. to Little Rock; 100 mi. to Memphis	Russell Harris, 888.301.5861 or www.teamworkarkansas.com
AR	Helena/W. Helena		3,110	Hwy. 20; rail spur; slack water harbor; all utilities in place	Martin Chaffin, 601-328-8227
AR	Marion	Marion Site M-1	1,250	Entergy Select Site; UP intermodal adjacent; near I-40 and I-55, access river from Memphis; 4 college work force training consortium	Russell Harris, 888.301.5861 or
AR	Mississippi Co.	Entergy Site 34	2,000	Entergy Site; 34 mi. to Memphis; fronts I-55; BNSF line less than 1/2 mile to east, can be extended	Russell Harris, 888.301.5861
AR	Saline Co.	Saline County I-530 Site	2,046	Entergy Select Site; 15 miles to Little Rock airport	Russell Harris, 888.301.5861
AR	Victorville	Southern Calif. Logistics Airport	4,000	master planned for industrial and business park development; logistics hub integrating ground, rail and air; BNSF intermodal yard planned for 2010; served by municipal utility; Mojave Desert ADWD, with less stringent air quality standards due to geographic region's air quality	Collette Hanna, City of Victorville, 760-243-8244
CA	California	California			
CO	Colorado	Colorado			
CO	Fountain	Christian Ranch Industrial Park	2,800	I-25 access; rail adjacent	Lisa Cochran, 719-322-2056
CO	Fruita	Fruita Greenway Bus. Park	1,750	farmland; all utilities in place; dual rail, and three spurs; zoned industrial; 3 land owners; borders state park.	Clint Kinney, Fruita City Manager, 970-858-3663
CO	Victorville	Southern Calif. Logistics Airport	4,000	Colo. River, I-70; 15 mi. east of Utah state line	Don Barber, 904-630-3115
FL	Florida	Florida			
FL	Jacksonville	David Clemens Center	1,900	rail I-95 access; certified for 2010; served by municipal utility; Mojave Desert ADWD, with less stringent air quality standards due to geographic region's air quality	

"Super Sites 2010"
Site Selection
 Magazine, Jan 2010
 ~150 sites with 1,000
 acres or more

Canup & Associates Incentives Comparison



Data compiled from Canup & Associates projects and published data.
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THANK YOU

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