

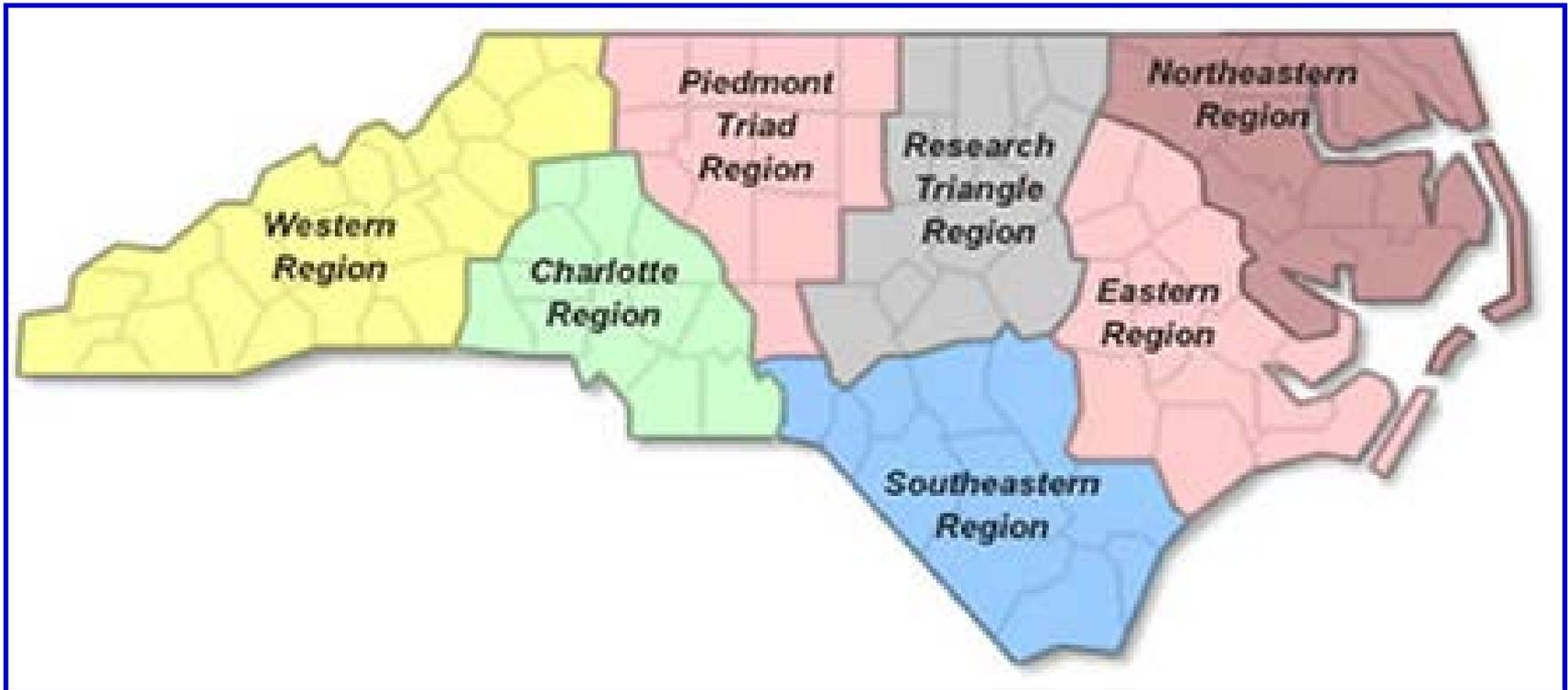
***EMPLOYMENT CENTERS
COMMON TRAITS OF SUCCESS***





Research Triangle

Raleigh-Durham-Chapel Hill, NC



Research Triangle

Raleigh-Durham-Chapel Hill, NC

- Public-Private Partnership with robust dedicated staff and website
- **15 county** region with **2.3 million people** covering **5,627 square miles**
- Founded 50 years ago, and in the last 5 years, claim to have helped create more than **100,000 jobs** in the region
- **69%** of new jobs created are in their **11 key industries**, which include:
 - ADVANCED MEDICAL CARE
 - AGRICULTURE BIOTECHNOLOGY
 - ANALYTICAL INSTRUMENTATION
 - BIOLOGICAL AGENTS AND INFECTIOUS DISEASES
 - CLEANTECH
 - DEFENSE TECHNOLOGIES
 - INFORMATICS
 - INTERACTIVE GAMING AND E-LEARNING
 - NANOSCALE TECHNOLOGIES
 - PERVASIVE COMPUTING
 - PHARMACEUTICALS





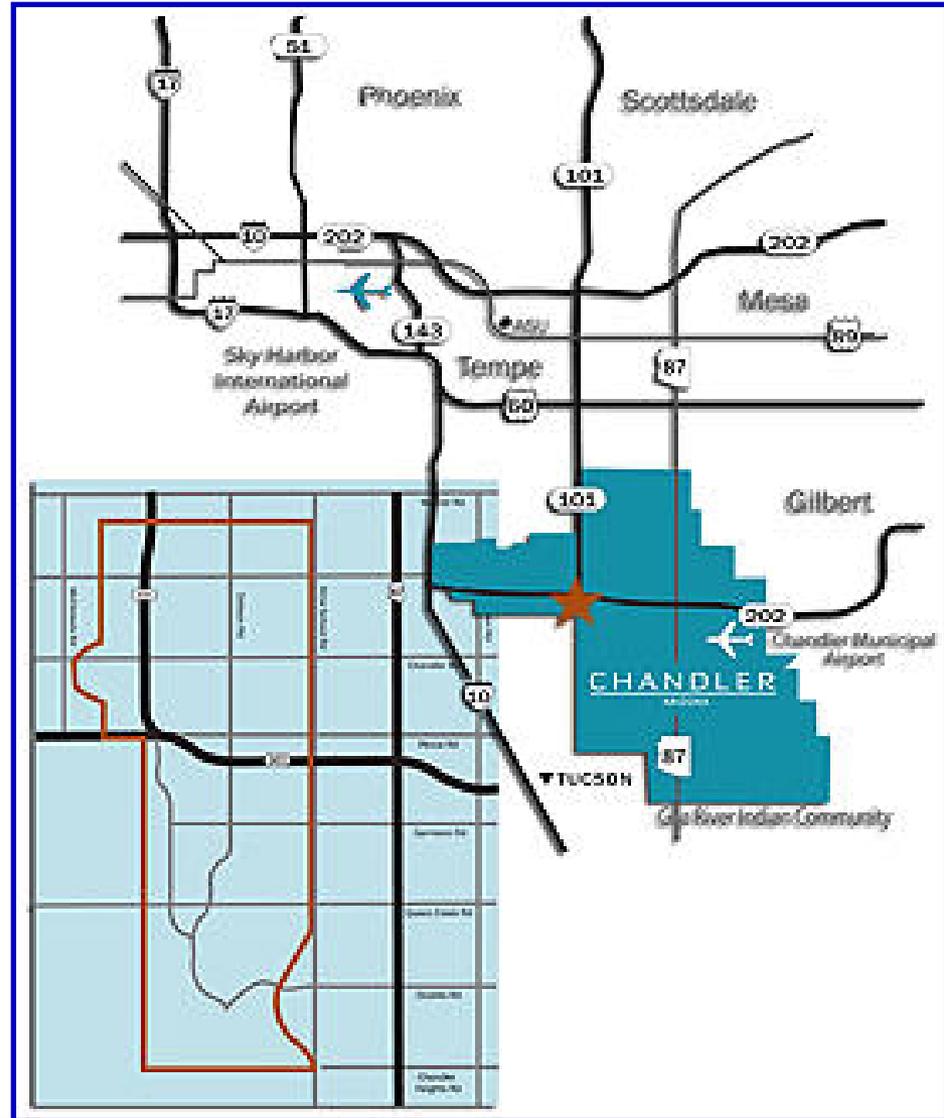
Research Triangle

Raleigh-Durham-Chapel Hill, NC

- **44% of population** has an Associates Degree or Higher (US Avg. is 36%)
- **164,000 students** in higher Ed system, graduating 32,000 every year
 - Highest Concentration of Engineering Degrees in US due to Duke University, NC State and UNC
 - Universities allow for a Global Reach with 850 global partnerships
 - \$3.25 billion in university research spending in 2012-13
- **~280 Startup Companies** in Region using University Technology
- **5,500+ businesses** in the region; major companies & employers include:
 - Affinergy, Cardinal Health, Agile Sciences, Applied Micro Products, GlaxoSmithKline, Merck & Co., Cisco, Duke Energy, Siemens, D3 Systems, EMC, IBM, Electronic Arts, RTI International, Deutsche Bank Global, HTC, Pfizer and many more
- Advanced Medical Care led the target industry clusters in new investments with **\$1.6 billion** in announced CapEx
- Education, Infrastructure, Quality of Life and an International Focus drive the Research Triangle



Price Road Corridor Chandler, AZ



Price Road Corridor

Chandler, AZ

- Began in 1985 when Motorola purchased 152 acres with Intel following shortly thereafter
- Loop 101 Extension to Pecos Rd. in 2000 was funded by Prop 303, and helped spur development
 - **20 businesses** before extension, and today there are more than **90 businesses** employing more than **40,000 people**
- Surrounding area has high education levels with **high household incomes** (\$100k+)
- Targeted Industries Include:
 - Advanced Business Services, Aerospace, High-Tech R&D/Manufacturing, Life Sciences & Sustainable Tech R&D/Manufacturing
- **Major Employers Include:** Bank of America, Freescale, Intel, Pearson, Rogers Corp. Toyota Financial, Microchip Tech., Amkor Tech, Orbital Sciences & more
- **Specialized Infrastructure:**
 - Air Products Nitrogen Pipeline
 - Redundant Power & Fiber
 - Industrial Power
 - High Capacity Wet Utilities





Price Road Corridor

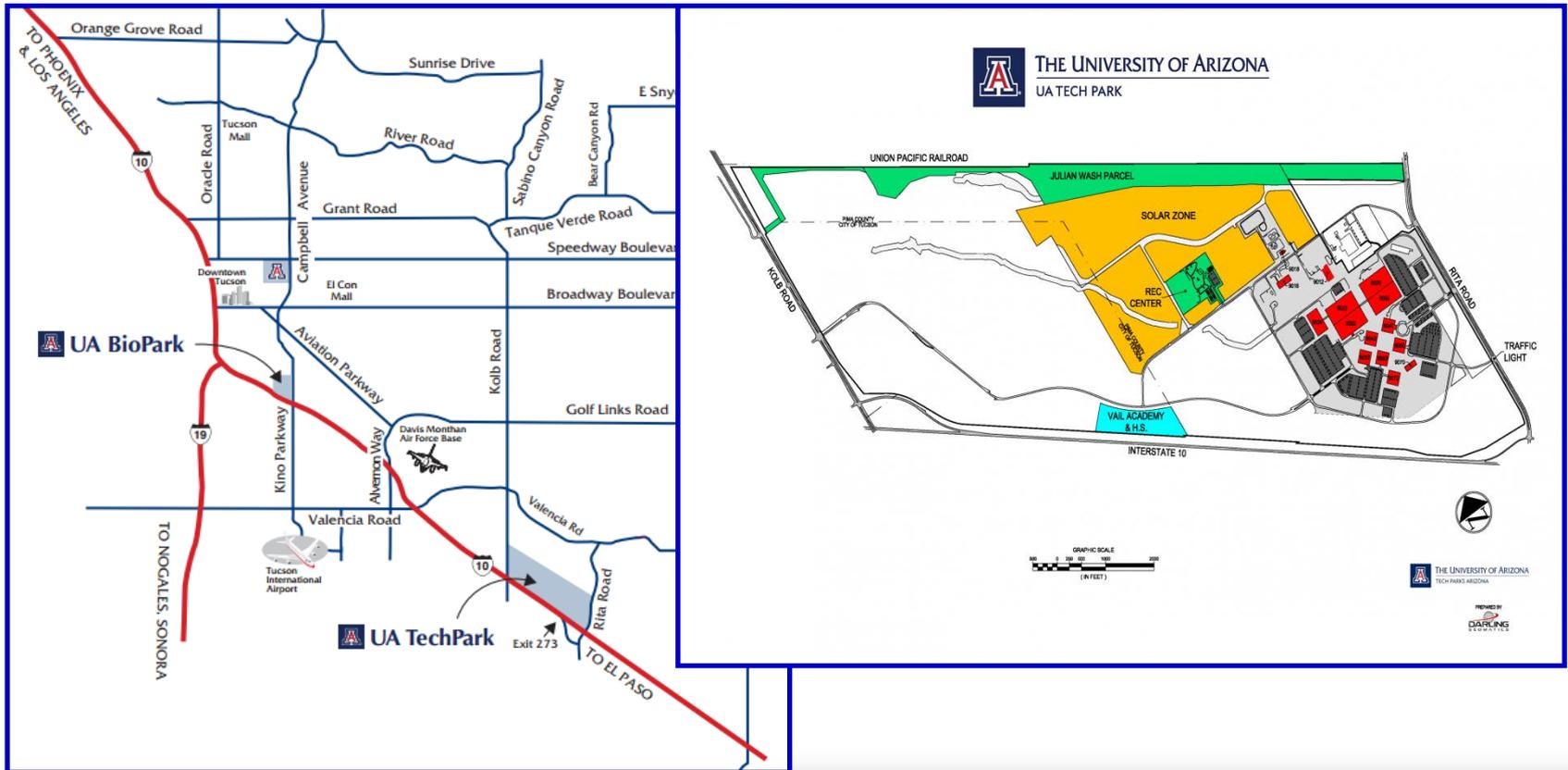
Chandler, AZ

- 275,000+ residents within a 10 minute drive time
- Relatively low median age of 32.5
- SRP is currently expanding a 230kv network including a new substation for the area that is expected to be complete in December 2015
 - <http://www.srpnet.com/electric/transmission/projects/priceroadcorridor/>
- The Corridor is approximately 50% “built out”
- Potential new project near the NWC of Loop 101 & Loop 202 Exchange for new mixed-used high density housing, retail and office project
 - Used to be the site of Elevation Chandler, which fell through in 2006



U of A Tech Park

Tucson, AZ



U of A Tech Park

Tucson, AZ

- U of A Tech Park is a **1,345** Acre Campus with ~2 Million SF of developed space
- Today has **45** companies with ~**6,000** employees
- Started in 1994 when U of A Purchased site from IBM, and had two tenants (IBM and Raytheon with 1,200 employees)
- Microsoft and Integrated Biomolecule Corp followed suit in 1996.
- The U of A Tech Park generated approximately **\$42.5 million** in tax revenue for state, county and city governments
- **Target Industries include:** Testing and R&D, Aerospace & Defense, Solar and Renewable Energy, and STEM Education & Workforce Development.
- Park provides domestic waste treatment & reclaimed water, central utility plant, zero-discharge sanitary, de-ionized water, chilled water and compressed air.
- Preliminary results for an economic impact study report that the Park is responsible for the creation of **14,686 jobs**, generated **\$77.3 million** in tax revenues, and had a **\$2.97 billion** total dollar impact.
- New 65 acre Bio Park will have 3.2M SF at build-out



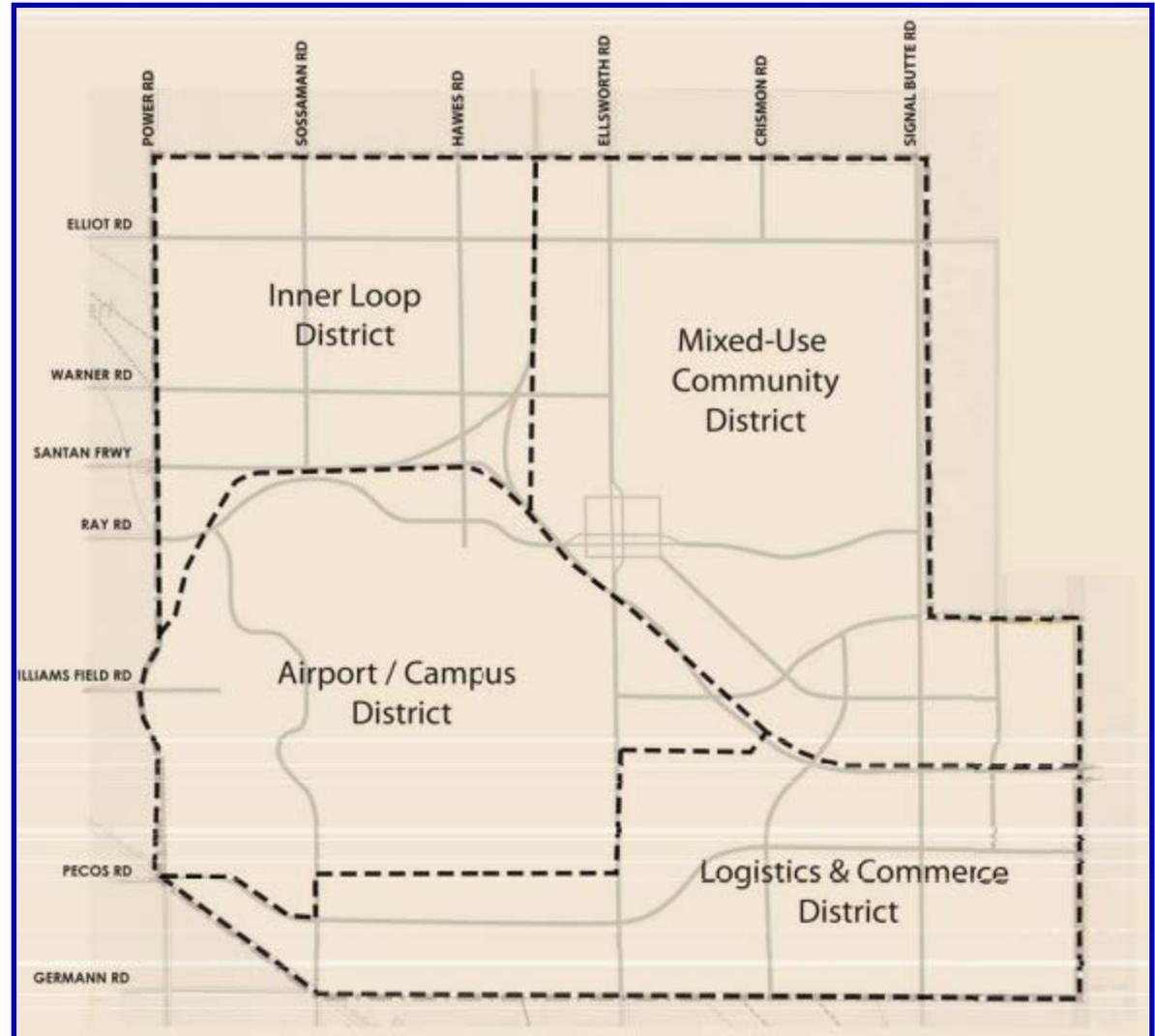
U of A Tech Park

Tucson, AZ

- Home to many high technology companies, the UA Tech Park houses 6 Fortune 500 companies: Citigroup, CH2MHill, IBM, Oracle, Optum RX (United Healthcare Group), and Raytheon.
- The Arizona Center for Innovation (AzCI) is a technology innovation center and business incubator located at the UA Tech Park.
- The Park is also home to Vail Academy and High School, a K-12 school, operated by the Vail School District and UA South an extension campus of the University of Arizona serving non-traditional students. Over 650 students from kindergarten through college attend class in the Park.
- Complete & Full History of the Tech Park can be found here
 - <https://techparks.arizona.edu/about-us/history>



Gateway y Area Mesa, AZ



Gateway Area

Mesa, AZ

- Approximately 40 square miles
- Relatively young employment (25 years) area that began during the early 1990s as cities and towns rapidly expanded city boundaries,
- Identified as a primary buffer and protection zone for the then recently decommissioned Williams Gateway Air Force Base
- In early 2000's EVP in cooperation with Mesa, Gilbert and QC invited Urban Land Institute to assess the area
- 2010 City embarked on a year long process to redefine the area as a mixture of uses that would become a self sustaining live, work, and recreate Employment Area for the city



Gateway Area

Mesa, AZ

- Gateway plays strong on the message of education with ASU Poly, Chandler Gilbert Community College, EVIT, and soon to break ground Grand Canyon University
- City leverages the ability to discuss with companies the ability to educate/train their current and future employees with adjacent educational institutions
- LaunchPoint is a technology innovation center and business incubator located adjacent to ASU POLY and Gateway Airport.
- Unique State incentive (Military Reuse Zone) enables Gateway Airport to create a very competitive business environment to aviation/aerospace companies



Gateway Area

Mesa, AZ

- Gateway Strategic Plan set a clear course on targeted industries, need to proactively invest in infrastructure, protect and promote the airport, and develop new approach to zoning/entitlements
- City has and continues to make it a high priority to invest in infrastructure and roads, and makes a concerted effort to protect the vision of the Area and the airport
- Home to many high technology companies, Apple, Fuji, MCG, Bridgestone, TRW, GTAT, Matheson Gas, CMC, Cessna, Embraer, and many others



Employment Corridor Commonalities

- Very close ties to large research institutions, or
- Typically anchored by one or several major employers
- Each corridor/area has been an employment corridor “in the making” for 20, 30 or even 50 years.
- Focus on unique infrastructure to draw unique users that need them (public/private utilities, transportation means/corridors, airports)
- Key industries are targeted, but can be tied to one another in some way
- Area places a high standard (use, wage, aesthetic of building)
- Enduring Political Support
- Robust & consistent marketing/branding efforts