

NATIONAL ASSOCIATION OF BUSINESS ECONOMISTS ATLANTA CHAPTER

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Georgia Department of Economic Development

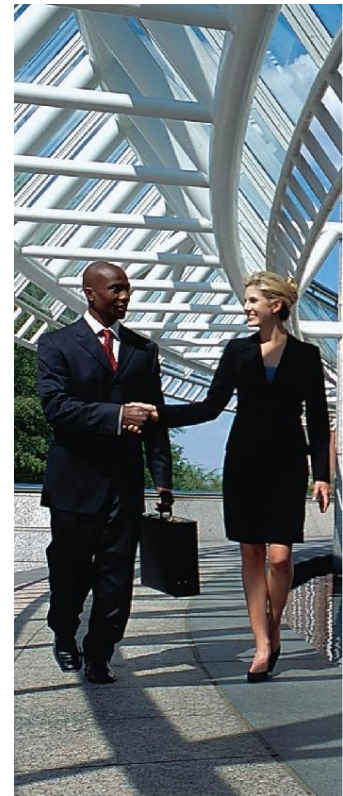
GEORGIA DEPARTMENT OF ECONOMIC DEVELOPMENT:

- ▶ **WHO WE ARE:** The Georgia Department of Economic Development (GDEcD) is the marketing and sales arm of the State of Georgia
- ▶ **WHAT WE DO:** Strategically deliver economic development throughout the state by:
 - ▶ Attracting new business investment
 - ▶ Supporting the expansion of existing industry and small businesses
 - ▶ Locating new markets for Georgia products
 - ▶ Attracting tourists from within and outside the state
 - ▶ Promoting Georgia as a desirable location for entertainment businesses and projects

GDECD:

GLOBAL COMMERCE DIVISION

- ▶ The Global Commerce division assists businesses by coordinating:
 - ▶ Site Location Services
 - ▶ Market Research
 - ▶ Business Incentives Analysis
 - ▶ Employee Training
 - ▶ Innovation and R&D Services
 - ▶ Export Assistance
 - ▶ International Office Assistance



GLOBAL COMMERCE: TEAM FOCUSED / INDUSTRY SPECIFIC

- ▶ Aerospace, Defense & Advanced Manufacturing
- ▶ Logistics, Energy, Agribusiness, & Food Processing
- ▶ Health Sciences & Advanced Technologies
- ▶ Corporate Solutions
- ▶ International Investment
- ▶ Existing Industry and Regional Recruitment
- ▶ International Trade
- ▶ Centers of Innovation



GLOBAL COMMERCE: STATEWIDE CONNECTIONS

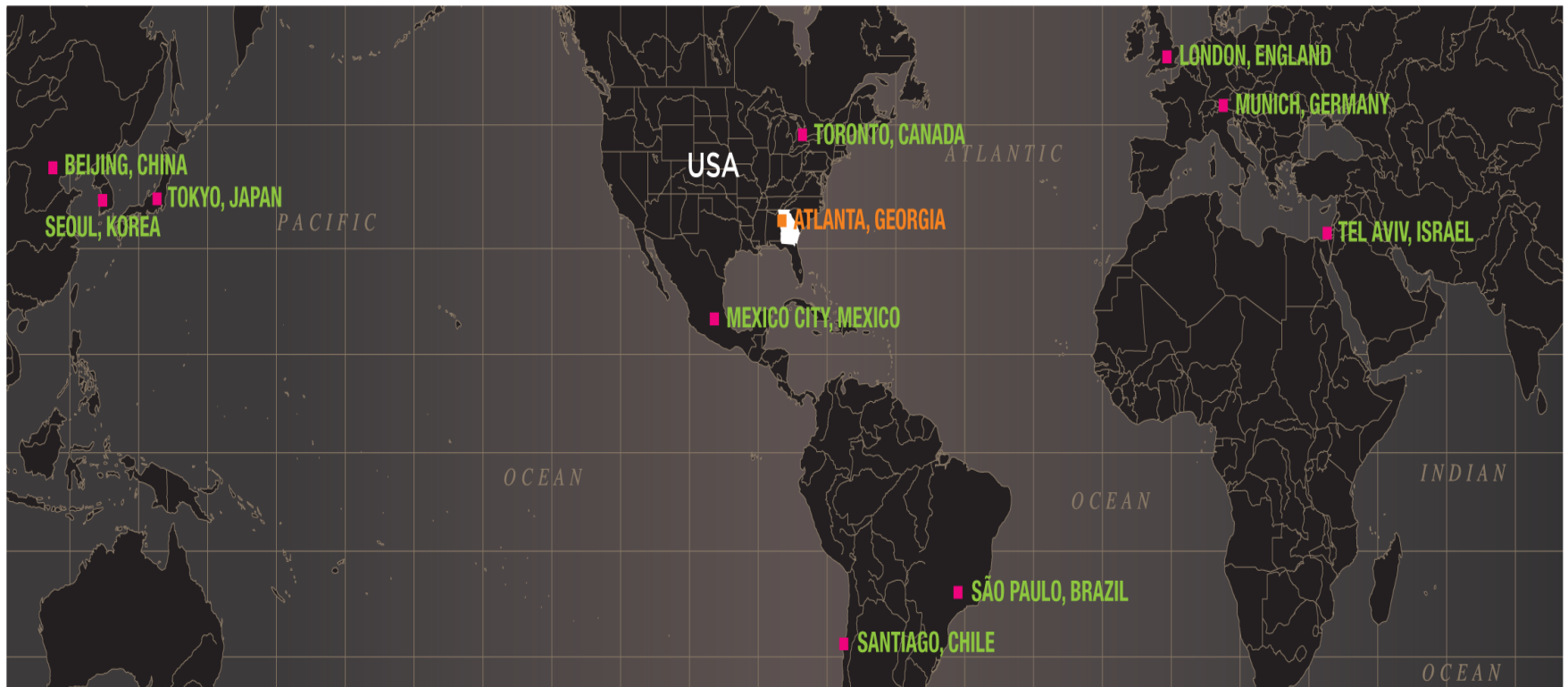


Regional Project Managers

- Work with existing companies on expansion projects
- Recruit new companies targeted for their region
- Provide regional expertise and local connections

GLOBAL COMMERCE: INTERNATIONAL OFFICES

10 International Offices



28TH ANNUAL CORPORATE SURVEY

Expect the economy to achieve
a more continuous growth track:

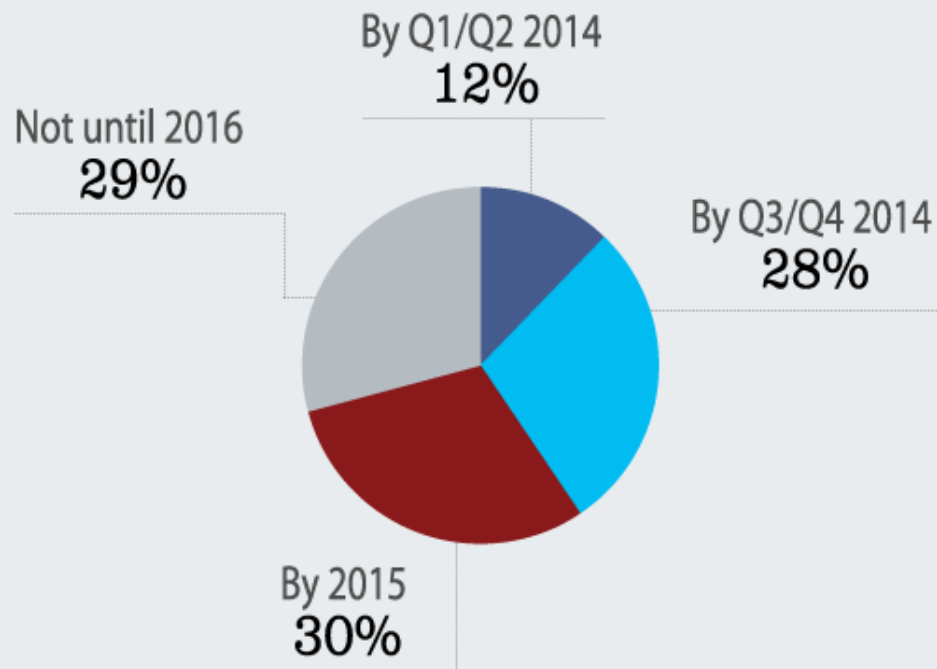


Figure 11

28TH ANNUAL CORPORATE SURVEY

Types of new domestic facilities to be opened
(as a percentage of total number to be opened):

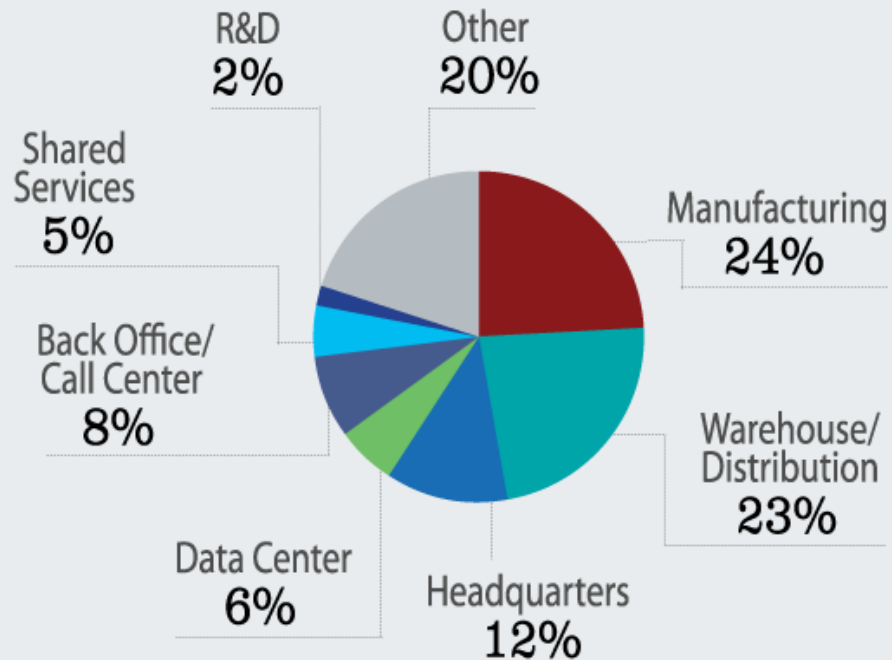


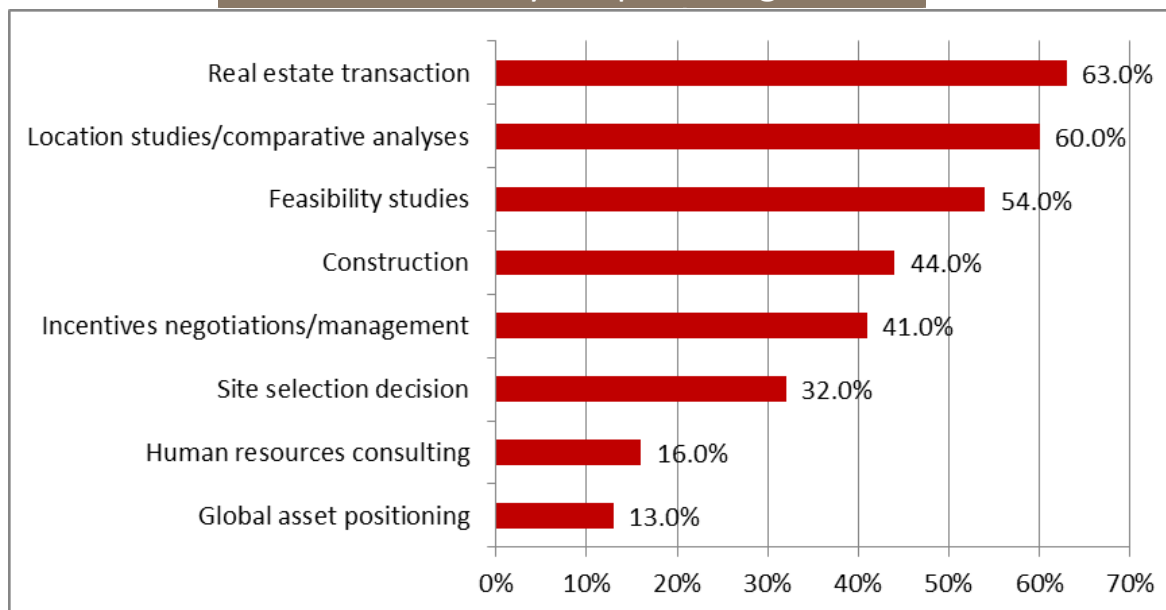
Figure 15

28TH ANNUAL CORPORATE SURVEY

Use of outside site selection or business consultants making a location decision:

Yes	43%
No	57%

If consultants outside the company are used, services they are providing:



Combined Ratings

CORPORATE SURVEY 2013*

Site selection factors

2013

2012

Ranking

1. Availability of skilled labor	95.1	89.4 (3) **
2. Highway accessibility	93.5	90.1 (2)
3. Labor costs	90.8	90.8 (1)
4. Occupancy or construction costs	87.4	82.8 (5)
5. Availability of advanced ICT services	84.6	85.1 (4)
6. Available buildings	83.3	78.4 (8)
7. Corporate tax rate	82.4	79.3 (7)
8. State and local incentives	81.9	71.1 (13)
9. Low union profile	81.4	73.5 (10)
10. Energy availability and costs	80.8	81.3 (6)
11. Tax exemptions	80.6	75.4 (9)
11T. Right-to-work state	80.6	72.6 (11)
13. Available land	80.3	59.0 (18)
14. Expedited or "fast-track" permitting	76.3	67.2 (15)
15. Proximity to major markets	75.6	72.2 (12)
16. Availability of long-term financing	74.8	63.1 (17)
17. Environmental regulations	71.7	71.1 (13T)

28TH ANNUAL CORPORATE SURVEY

Importance of the existence of an available building in the site search:

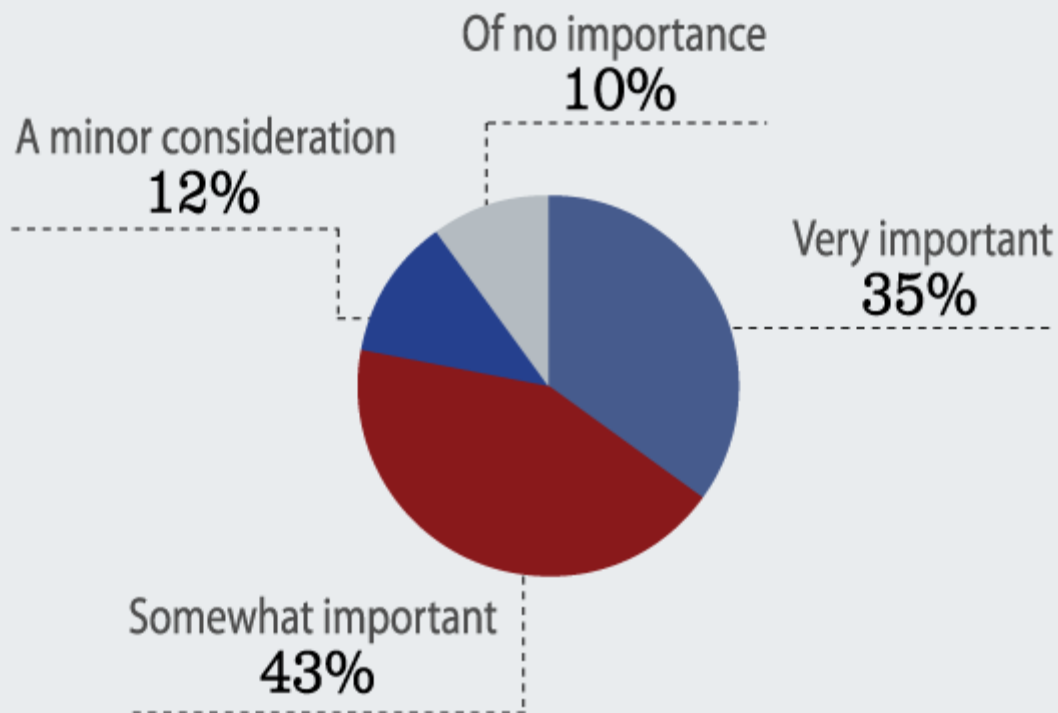


Figure 47

28TH ANNUAL CORPORATE SURVEY

Importance of the existence of a shovel-ready/
pre-certified site:

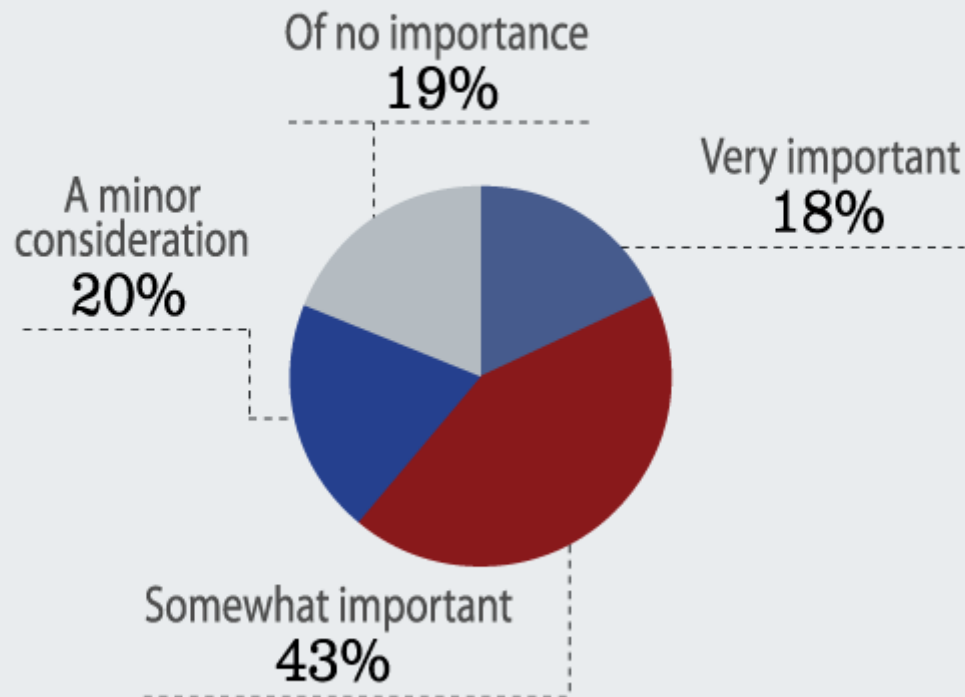


Figure 48



GEORGIA READY FOR ACCELERATED DEVELOPMENT (GRAD) SITES



	Name	County	Total Site Size (Acres)	Interstate	Railroad
1	University Parkway/Stan Coley Property	Bartow	196-78.25	17 miles	No
2	Highland 75	Bartow	1-707	0.9 miles	No
3	Softex Industrial Park	Bibb	5-275	3.1 miles	Yes
4	Brooks County Industrial Park	Brooks	2-201	14 miles	Yes
5	Interstate Centre	Bryan	5-800	At Site	No
6	Gateway Regional Industrial Park II	Bulloch	41 & 122	4.88 miles	Yes
7	Villages of Kingland	Camden	5-575	2 miles	Yes
8	Temple Industrial Park Phase II	Carroll	5-15	At site	No
9	Cherokee 75	Cherokee	1-400	1 mile	No
10	South Cook Industrial Park	Cook	5-2000	Adjacent	Yes
11	Pecan Grove Industrial Park	Dougherty	1-340	40 miles	No
12	Governor Insull Site	Etowah	5-81	10 miles	Yes
13	Gateway Industrial Centre	Hall	588	5.5 miles	Yes
14	Middle Georgia Corporate Center	Houston	10-900	Adjacent	No
15	Jefferson Distribution Center	Jackson	4.41-82.50	At Site	No
16	Tradeport East	Liberty	1-295	0.6 miles	No
17	Tradeport West	Liberty	5-272	2.2 miles	Yes
18	Buster Sanford Industrial Park	Lowndes	1-242	4.6 miles	Yes
19	Miller Business Park	Lowndes	5-140	4.5 miles	No
20	West Side Industrial Park	Lowndes	1-90	0.7 miles	No
21	Stone Industrial Park	McDuffie	420	0.25 miles	No
22	Tidewater Industrial Complex	McIntosh	130	At Site	No
23	Meridian 75	Monroe	8.65-258	Adjacent	No
24	Muscogee Technology Park	Muscogee	4-200	6 miles	Yes
25	Gedertown North Business Park, Phase 2	Polk	220	24 miles	No
26	Stanton Springs	Newton	5-1456	At site	No
27	Augusta Corporate Park	Richmond	5-1714	9 miles	Yes
28	Screven County Industrial Park	Screven	5-390	40 miles	No
29	Hayestown-Brady Industrial Park (Highway 17 Site)	Stephens	1-350	7 miles	No
30	Toombs County Corporate Center, Lyons	Toombs	5-75	12 miles	No
31	Central Georgia Business and Technology Park	Upson	1-182	26 miles	Yes
32	Carbondale Business Park	Whitfield	3-50	Adjacent	No
33	Worth County Industrial Park	Worth	60 & 70	21 miles	Yes



Baxter International



Caterpillar Inc.



Starbucks



voestalpine

LET'S BREAK GROUND TOGETHER

Baxter International, Caterpillar, Starbucks and voestalpine have all taken advantage of the due diligence behind the Georgia Ready for Accelerated Development (GRAD) Sites Program.

- ✓ Ownership security
- ✓ Zoning designation
- ✓ Road and rail accessibility
- ✓ Utilities service
- ✓ Wetlands and stream delineation

Learn more about our shovel-ready sites at Georgia.org.

We SPEAK Business



Georgia Department of Economic Development



28TH ANNUAL CORPORATE SURVEY

Impact of high energy costs:

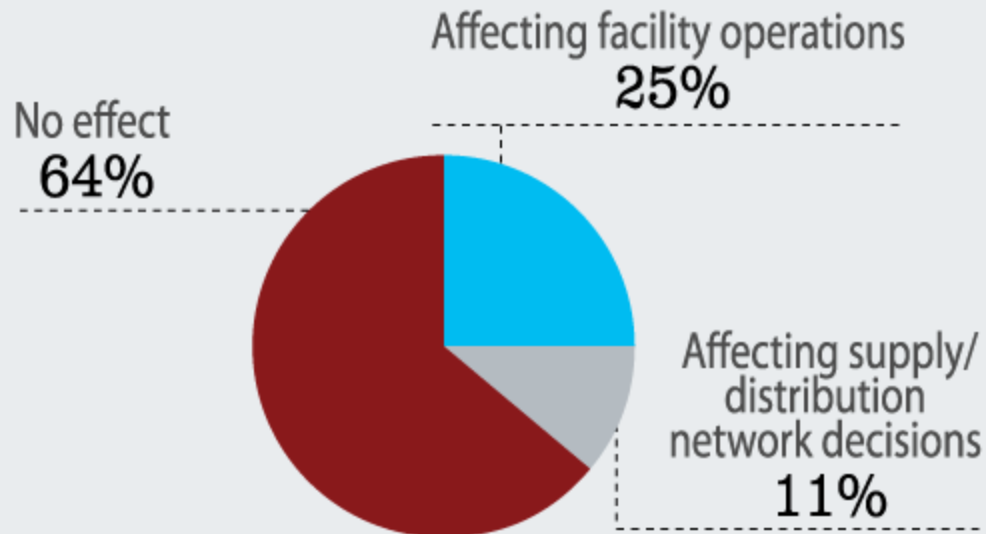
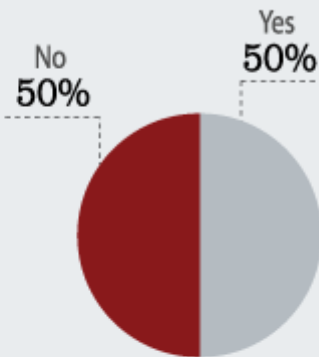


Figure 37

28TH ANNUAL CORPORATE SURVEY

New unconventional sources of energy (e.g., through fracking) will drive down energy costs:



If so, any effect on location decisions:

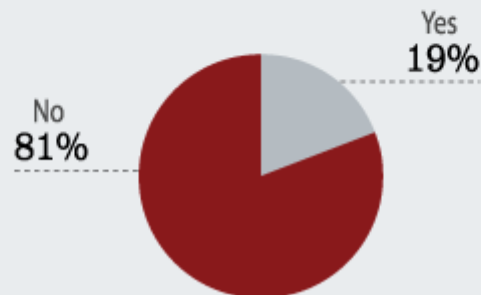
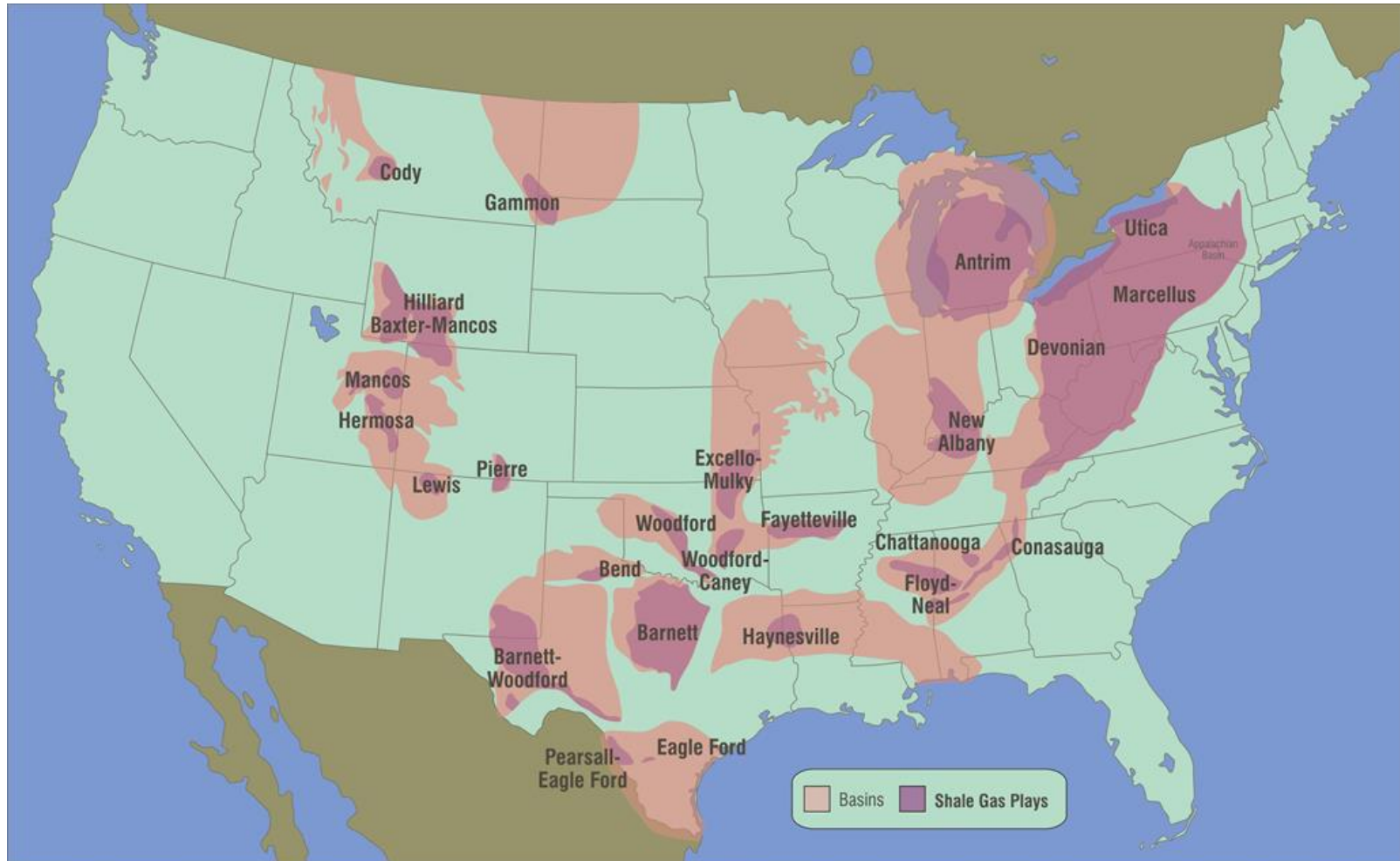


Figure 38

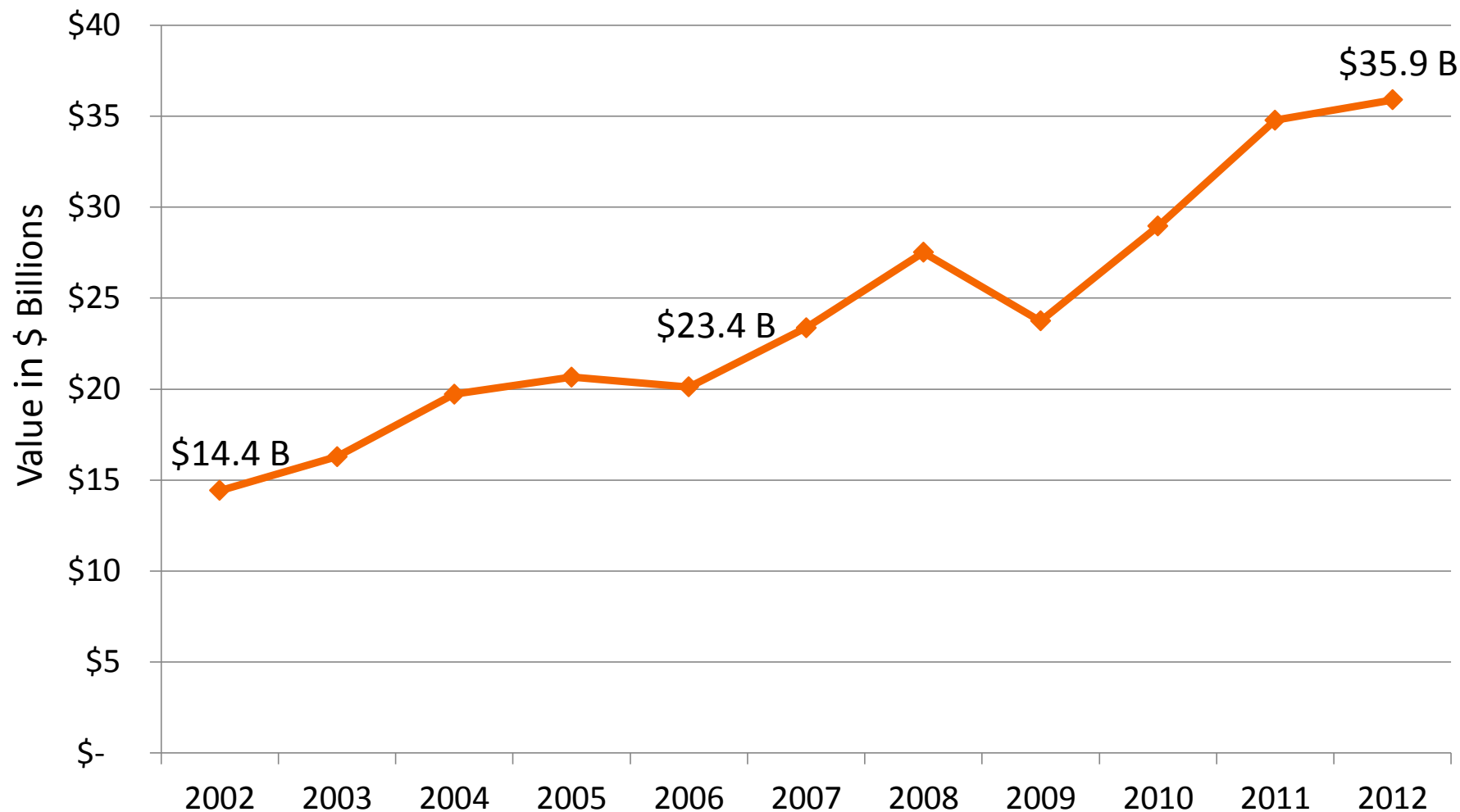
Shale Gas Plays - Lower 48 States



Source: Energy Information Administration

GLOBAL ACCESS:

GEORGIA'S EXPORT GROWTH 2002-2012



28TH ANNUAL CORPORATE SURVEY

Importance of incentives to a project moving forward in a particular location:

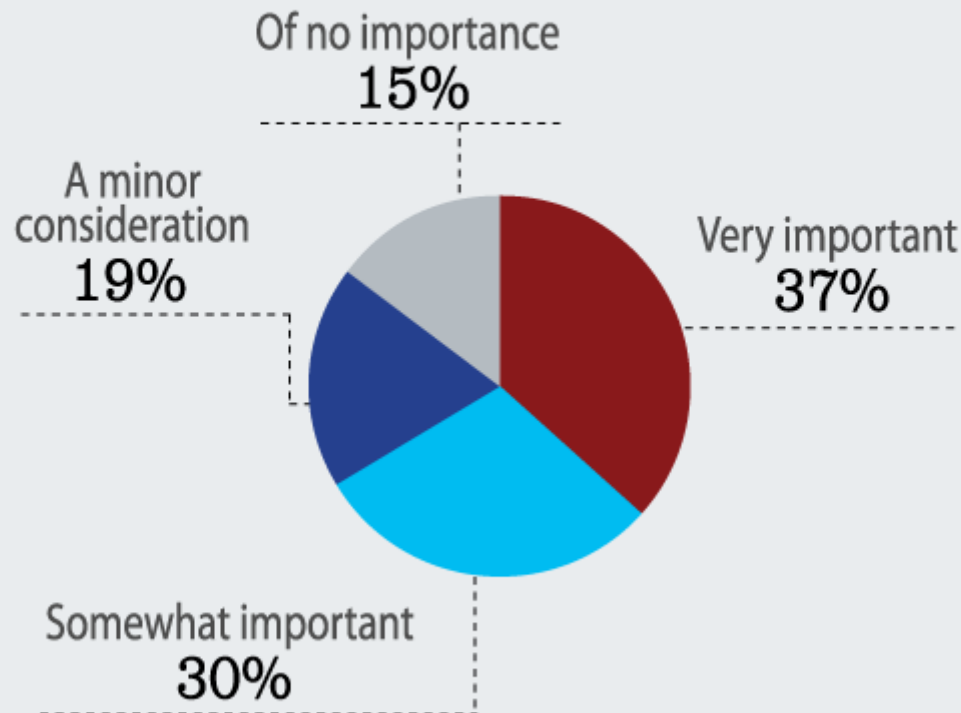
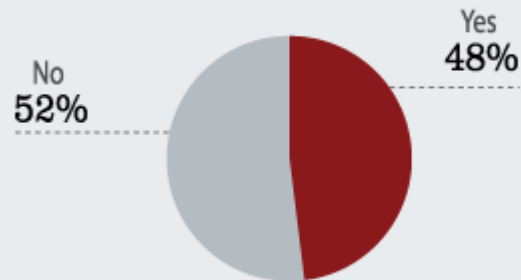


Figure 42

28TH ANNUAL CORPORATE SURVEY

Company has received and utilized incentives in the past:



If so, percentage of the incentives initially estimated value company secured (or expects to secure):

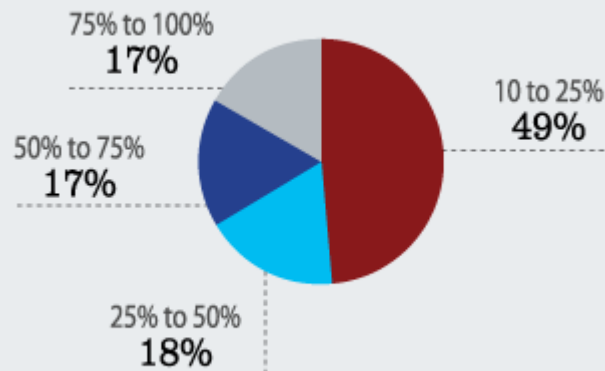


Figure 43

28TH ANNUAL CORPORATE SURVEY

Company's dependence on contract workers or contingent labor:

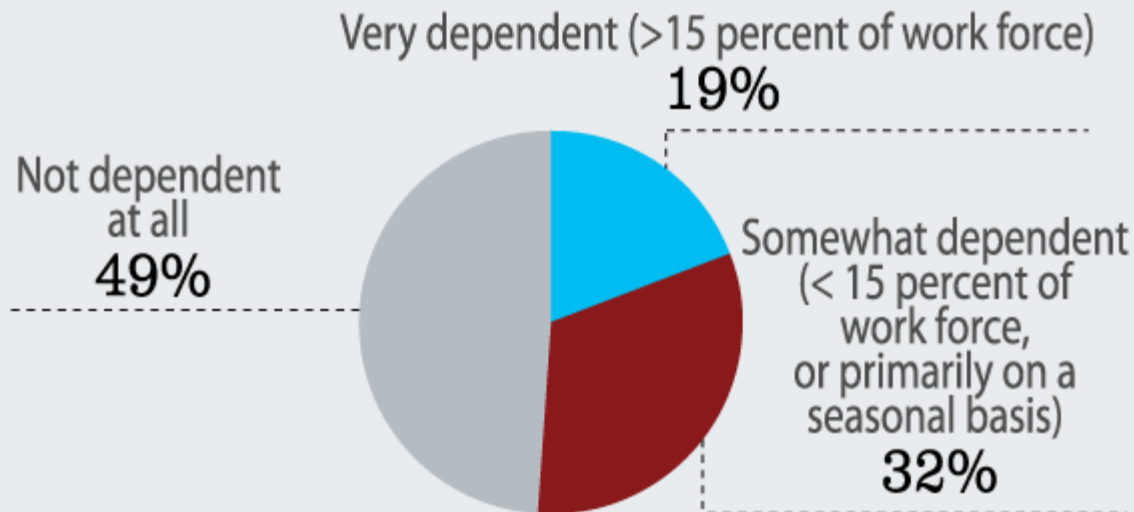
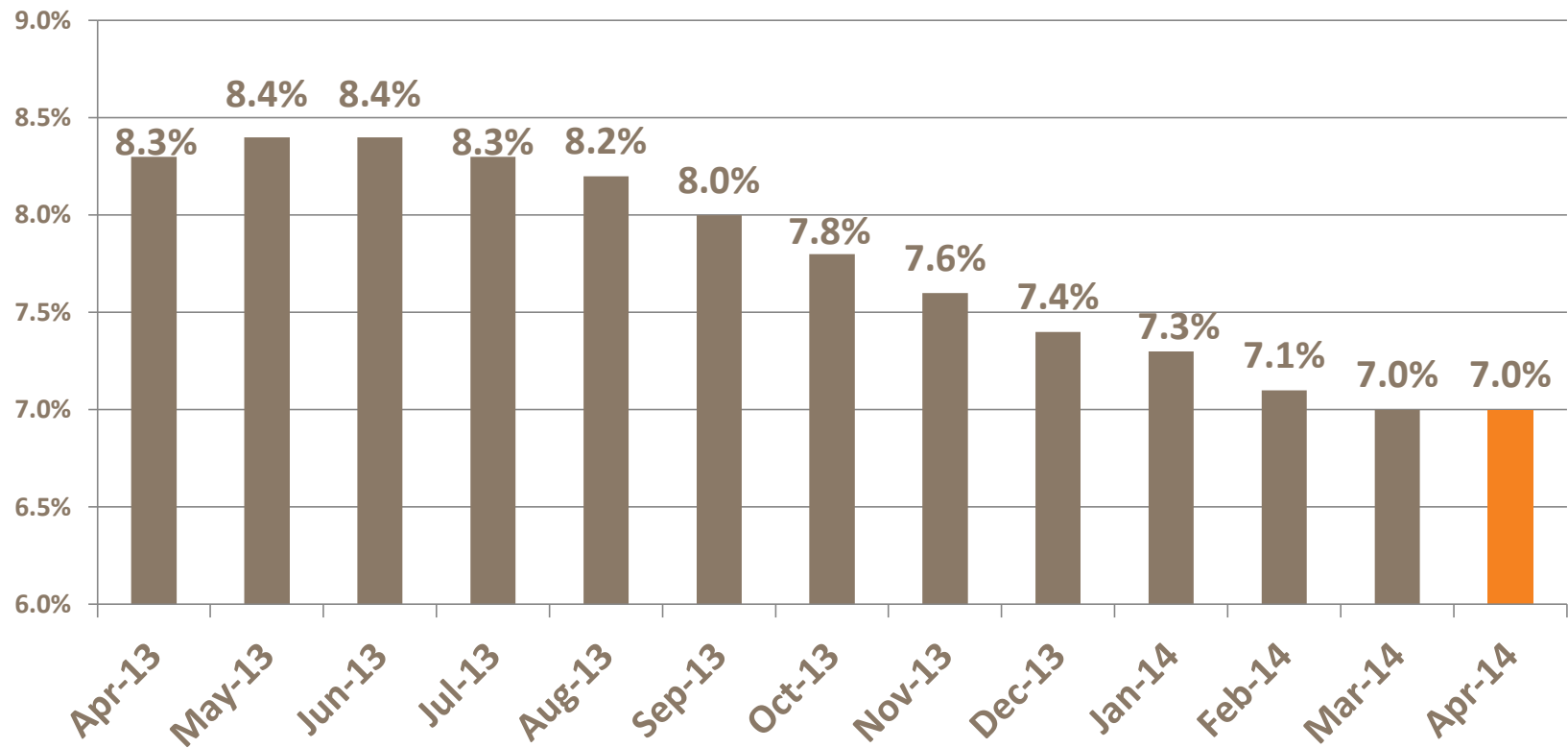


Figure 35

GEORGIA'S 7.0% UNEMPLOYMENT RATE (APR '14)



GEORGIA AHEAD IN BUSINESS

