

**Economic Trends in
Metropolitan Washington
1994 - 1998**

July 14, 1999

**Metropolitan Washington Council of Governments
Department of Human Services, Planning, and Public Safety**



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TITLE: Economic Trends in Metropolitan Washington, 1994 - 1998

DATE: July 14, 1999

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Human Services, Planning and Public Safety
Metropolitan Washington Council of Governments

AGENCY: The Metropolitan Washington Council of Governments (COG) is the regional organization of the Washington area's major local governments and their elected officials. COG works toward solutions on such regional issues as growth, transportation, affordable housing, air pollution, water supply, water quality, and economic development. COG serves as the regional planning organization for metropolitan Washington.

REPORT ABSTRACT: This report provides information on the Washington, D.C. region's population, employment, federal spending, construction, retail sales, inflation, mortgage rates, and number of passengers served by the area's major airports.

PRICE: \$40

NUMBER OF PAGES: 44 + iv

PUBLICATION NUMBER: 99811

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Economic Trends in Metropolitan Washington, 1994 - 1998**SUMMARY**

Population - The region grew by more than 209,800 people between 1994 and 1998. The inner suburbs grew the most in terms of the absolute number of people, while the outer suburbs had the greatest percentage increase in population. The District of Columbia lost 44,000 people between 1994 and 1998. According to COG's Cooperative Forecasts, the number of people in the region will grow by more than 43 percent by the year 2020.

Employment - After increasing from 2.18 million jobs in 1993 to 2.21 million in 1994, the number of jobs in the area rose to 2.36 million in 1998. Losses of federal and state government jobs slowed overall employment growth, while the services industries remained the core of the region's job market.

Federal Spending - The federal government spent \$64.7 billion in the region in 1998, up from \$62.3 billion in 1997. For the second time, local federal procurement exceeded salaries and wages. The District of Columbia was home to \$24 billion of spending, Northern Virginia received \$23.2 billion, and suburban Maryland received \$17.4 billion.

Construction - Construction in the Washington region increased significantly in 1998. Developers broke ground on nearly 29.3 million square feet of commercial projects -- an increase of just more than 8.1 million from the 1997 total. This was the third greatest amount of new space started in any year since COG began monitoring commercial construction in the 1980's. Led by Fairfax County, local governments issued building permits for more than 30,871 new housing units, up from the 1997 figure.

New Home Sales, Mortgage Rates, and Housing Inflation - The number of new homes sold was nearly 22,000, or more than 3,000 higher than in 1997. After falling slightly during 1997, mortgage rates dropped in 1998, averaging approximately 7.1 percent for the year. Housing inflation, as measured by the housing component of the Consumer Price Index for All Urban Consumers (CPI-U), increased to 2.1 percent.

Inflation - Overall inflation in the Washington region adjusted to 1.3 percent in 1998, largely due to higher costs of housing and transportation. The region's inflation rate in 1998 was just below the national rate of 1.6 percent.

Income - Total personal income in the Washington region grew by an average of 5.5 percent per year between 1993 and 1997, leading to a 1997 total of \$146 billion. On a per capita basis, 1997 income varied greatly by jurisdiction, with a regional average of \$34,246.

Retail Sales - Retail sales in the region increased in both nominal and real terms between 1992 and 1996. After slipping from \$43.7 billion in 1994 to \$43.2 billion in 1995, retail sales rose to \$44.0 billion in 1996 (all figures in 1996 dollars).

Airline Passengers - More than 46 million passengers flew into or out of the Washington region's three major airports in 1998, a 16.4 percent increase from 1994.

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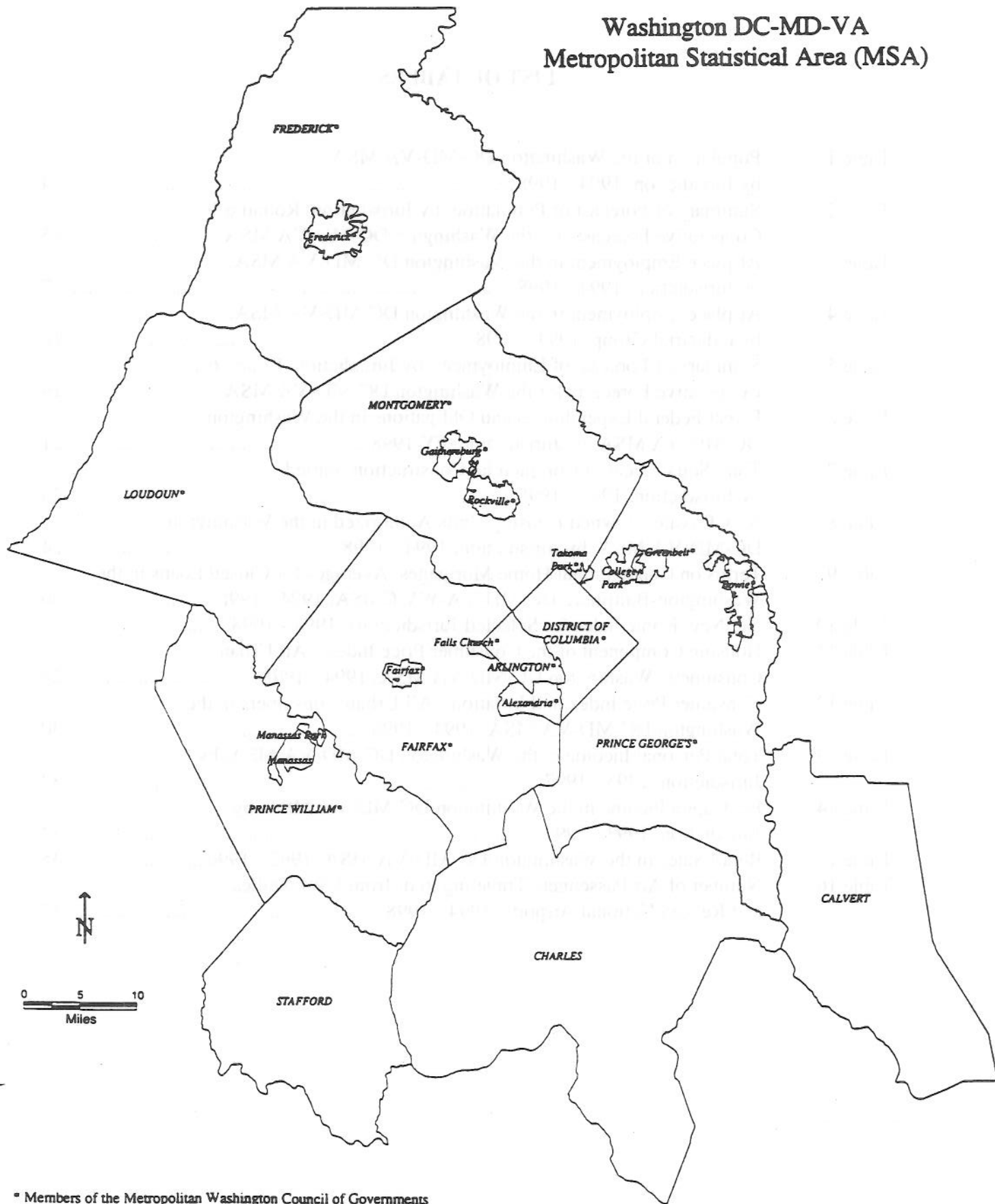
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Washington DC-MD-VA
Metropolitan Statistical Area (MSA)



* Members of the Metropolitan Washington Council of Governments
MSA as defined by the U.S. Office of Management and Budget, 1983.

Overview of Economic Trends in Metropolitan Washington, 1994 - 1998

INTRODUCTION

Economic Trends in Metropolitan Washington is an annual publication of the Metropolitan Washington Council of Governments. This year's report focuses on economic trends between the years 1994 and 1998, and is divided into sections covering population, employment, federal expenditures and obligations, construction, retail sales, mortgage rates and new home sales, personal income, inflation, and transportation.

Throughout the report, information is presented at different levels of geographic specificity. These levels and their components are outlined below.

The Membership of the Metropolitan Washington Council of Governments (Jurisdictions with an asterisk in the map)

Members of the Metropolitan Washington Council of Governments are the District of Columbia; Frederick County, Montgomery County, Prince George's County, and the Cities of Bowie, College Park, Frederick, Gaithersburg, Greenbelt, Rockville, and Takoma Park in Maryland; and Arlington County, Fairfax County, Loudoun County, Prince William County, and the Cities of Alexandria, Fairfax, and Falls Church in Virginia.

The Washington DC-MD-VA Metropolitan Statistical Area (MSA) (see map), as defined by the Office of Management and Budget in 1983, extends beyond the membership of the Council of Governments. It includes the District of Columbia; Calvert County, Charles County, Frederick County, Montgomery County, and Prince George's County in Maryland; and Arlington County, Fairfax County, Loudoun County, Prince William

County, Stafford County, and the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park in Virginia. Note that different data items are available for different levels of geographic specificity. See Appendix A for more details.

Central Jurisdictions

The central jurisdictions are defined as the District of Columbia, Arlington County, and the City of Alexandria.

Inner Suburbs

The inner suburbs are Montgomery County, Prince George's County, Fairfax County, and the Cities of Fairfax and Falls Church.

Outer Suburbs

The outer suburbs are defined as Calvert County, Charles County, Frederick County, Loudoun County, Prince William County, Stafford County, and the Cities of Manassas and Manassas Park.

Washington Primary Metropolitan Statistical Area (PMSA)

As a result of the 1990 Census, OMB has modified the definition of metropolitan areas for federal statistical purposes. Under the new definition, the Washington PMSA, the Baltimore PMSA, and the Hagerstown PMSA have been combined into a new Consolidated Metropolitan Statistical Area (CMSA). The individual PMSAs are now expanded and separately recognized as PMSAs. Unless otherwise noted, this report continues to use the 1983 OMB definition of the MSA.

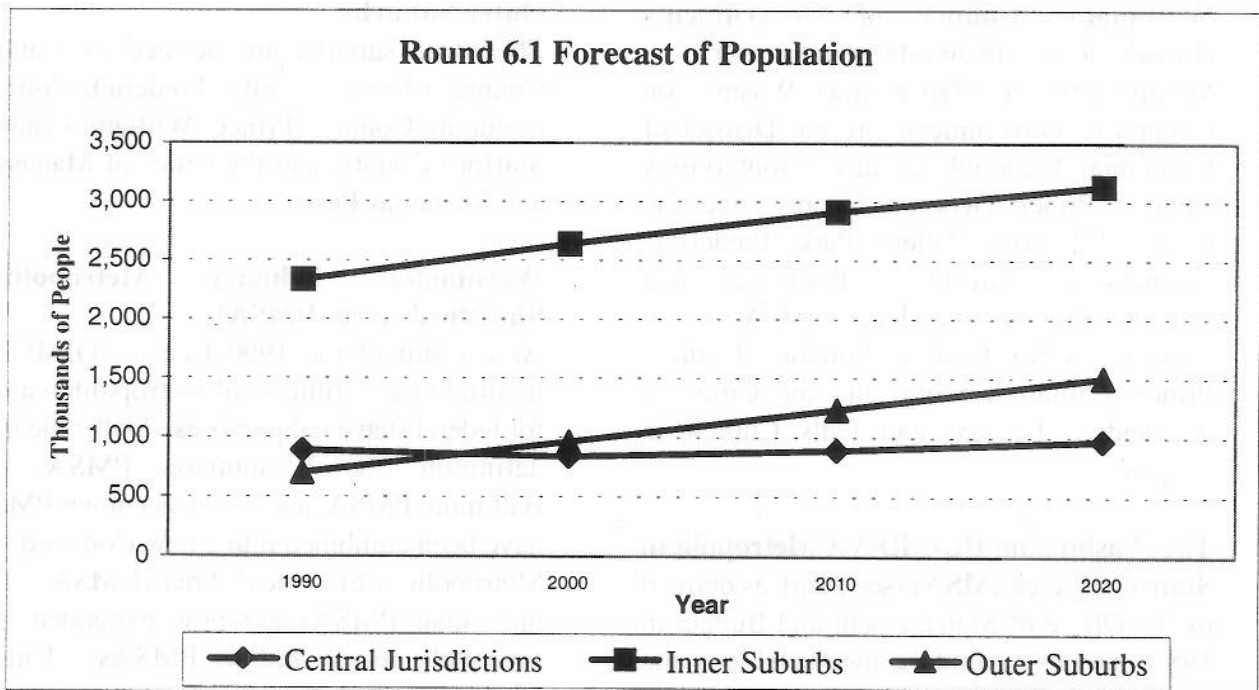
OVERVIEW

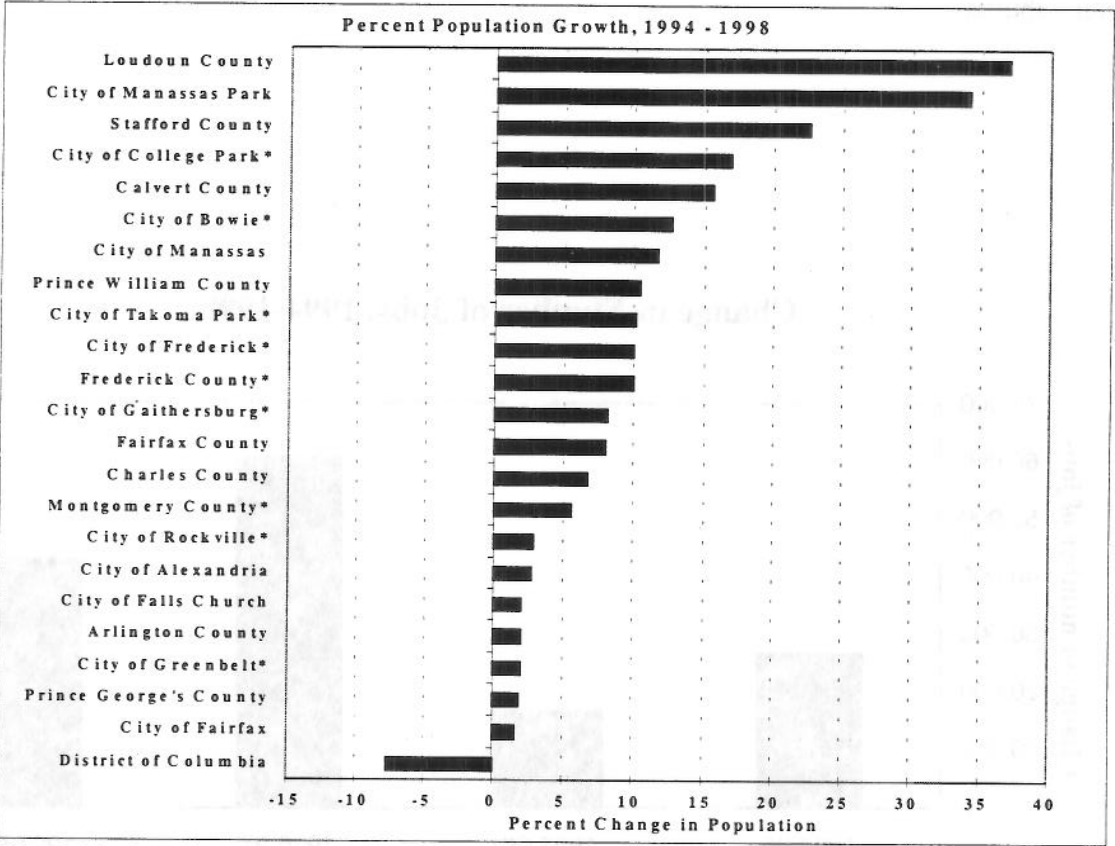
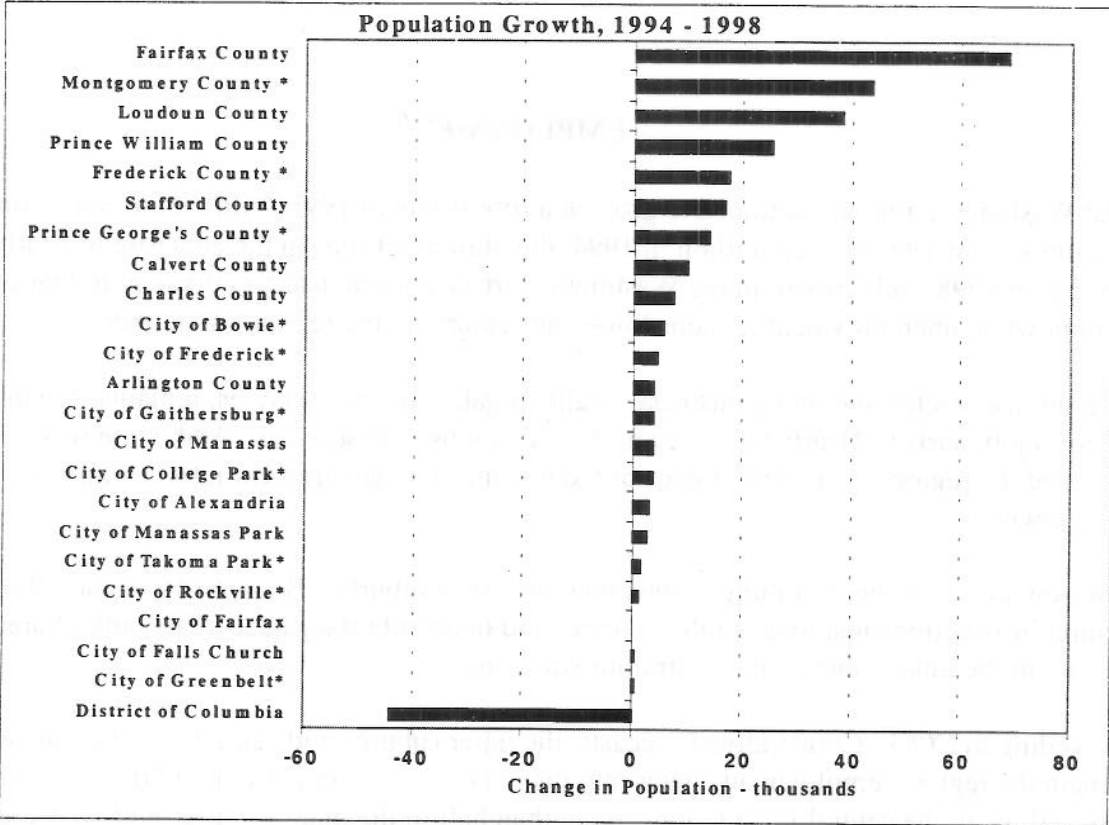
POPULATION

The region grew by more than 209,800 people between 1994 and 1998. The majority of this growth occurred in the region's outer suburbs, which increased by 15.0 percent or 120,900 people. The inner suburbs, with the addition of 126,100 people, grew by 5.1 percent. The region's central jurisdictions had a net loss of 37,200 people, or 4.3 percent, with population decline in the District offsetting increases in Arlington and Alexandria.

Despite the dramatic growth rate in the outer suburbs, the population remains anchored in the inner suburbs, where 60 percent of the region's population lives.

According to COG's Cooperative Forecasts, the inner suburbs will remain the most populous "ring" of the region well into the next century. COG forecasts that in the year 2020, the region will hold more than 5.6 million people (42.9 percent more than the 1990 population). A full 56 percent of the 2020 population is expected to live in the inner suburbs.





*Data for Maryland cities are also included in appropriate county totals.

OVERVIEW

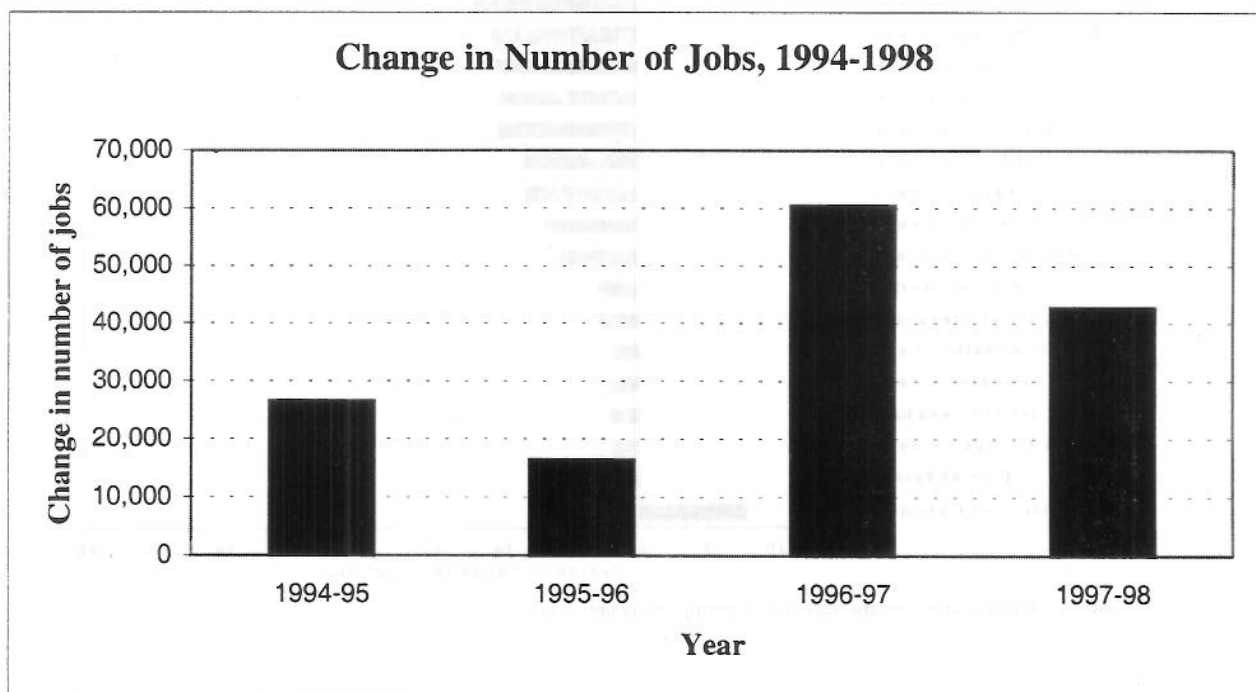
EMPLOYMENT

The Washington region continued to grow at a robust rate in 1998. After increasing from 2.18 million jobs in 1993 to 2.21 million in 1994, the number of jobs in the area rose to nearly 2.4 million in 1998. Job growth in the Washington area has been nearly equivalent to that of the nation, while unemployment remains low— particularly in the region's suburban jurisdictions.

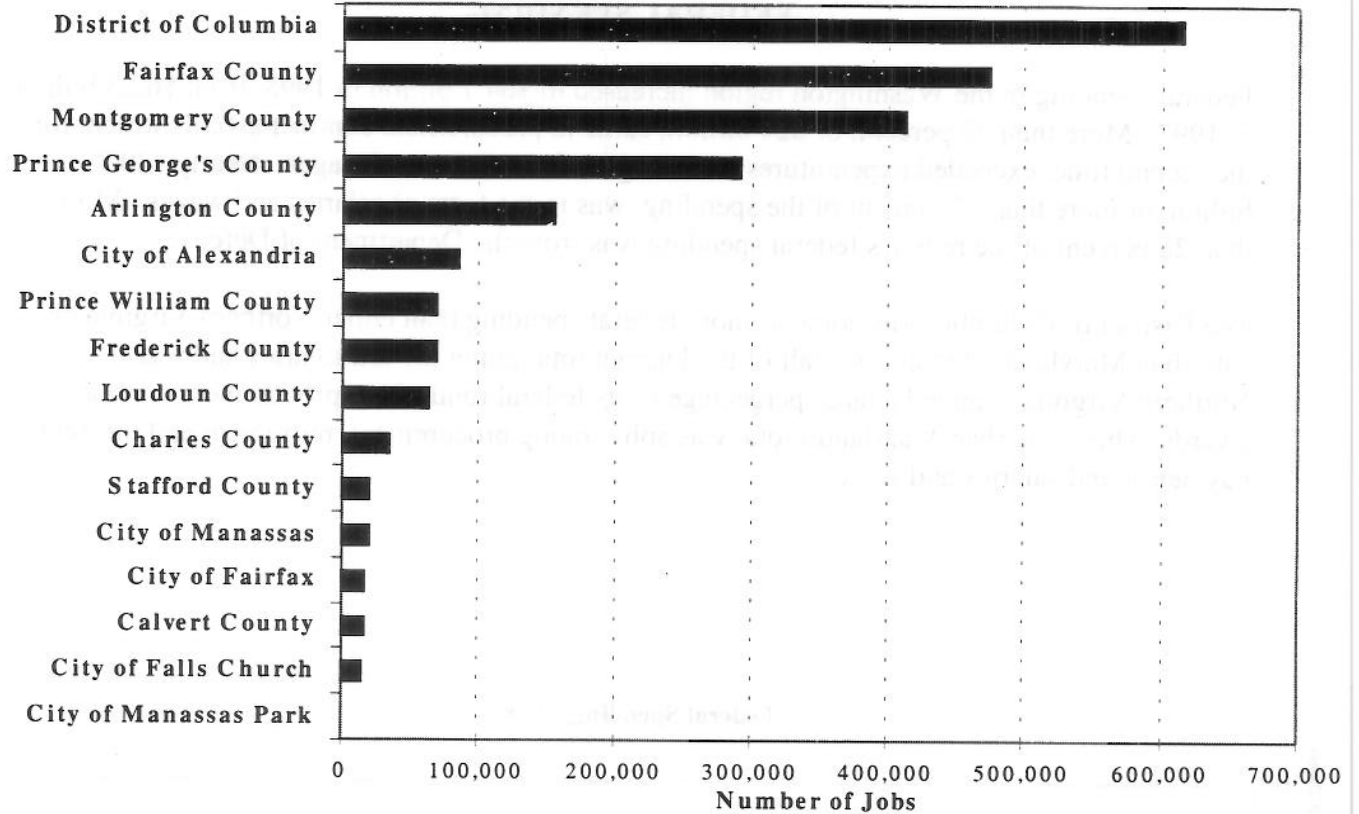
The services sector, including business, health, legal, and other services, remains the core of the region's job market. Nearly two of every five area jobs is in services. And while service jobs have led the region in recovery, losses of federal and state government jobs have limited overall job growth.

The new jobs have been coming to the inner and outer suburbs. Between 1994 and 1998, the central jurisdictions lost jobs, while the inner and outer suburbs gained. The bulk of area jobs remain in the inner suburbs and central jurisdictions.

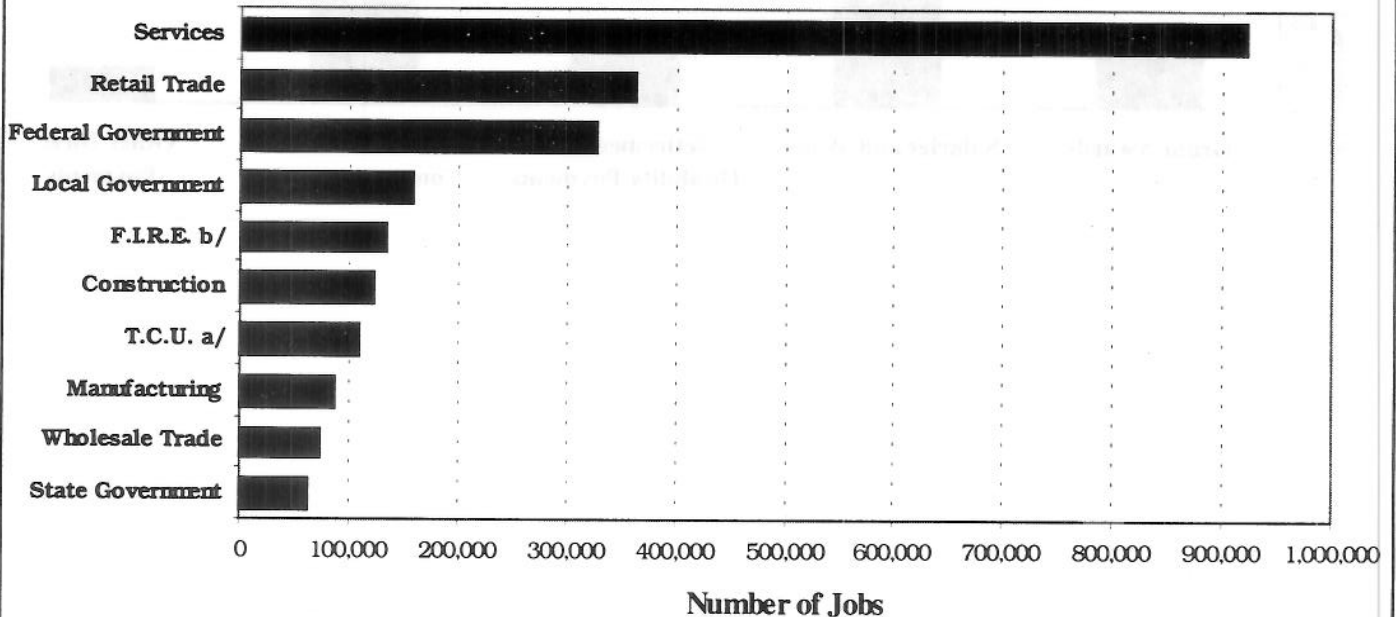
According to COG's Cooperative Forecasts, the inner suburbs and central jurisdictions will remain the region's employment center into the next century. In the year 2020, 34 percent of all jobs will be in the central jurisdictions, more than half in the inner suburbs, and 16 percent in the outer suburbs.



Number of Jobs, by Jurisdiction, 1998



Number of Jobs, by Sector, 1998



NOTE: 1998 Figures for Maryland and Virginia jurisdictions are estimates based on the first three quarters.

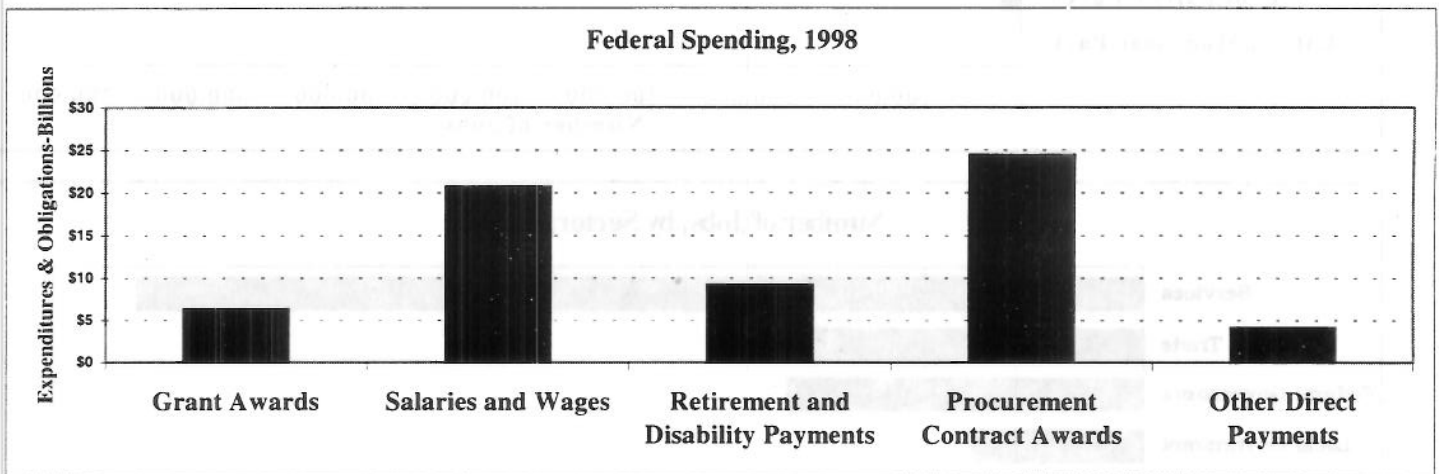
A/ T.C.U. stands for Transportation, Communications, and Public Utilities.

B/ F.I.R.E. stands for Finance, Insurance, and Real Estate.

FEDERAL SPENDING

Federal spending in the Washington region increased to \$64.7 billion in 1998, from \$62.3 billion in 1997. More than 38 percent, or \$24 billion, came in procurement contract awards which, for the second time, exceeded expenditures in the region for salaries and wages. Nearly \$20.7 billion, or more than 32 percent of the spending, was in the form of salaries and wages. More than 28 percent of the region's federal spending was from the Department of Defense.

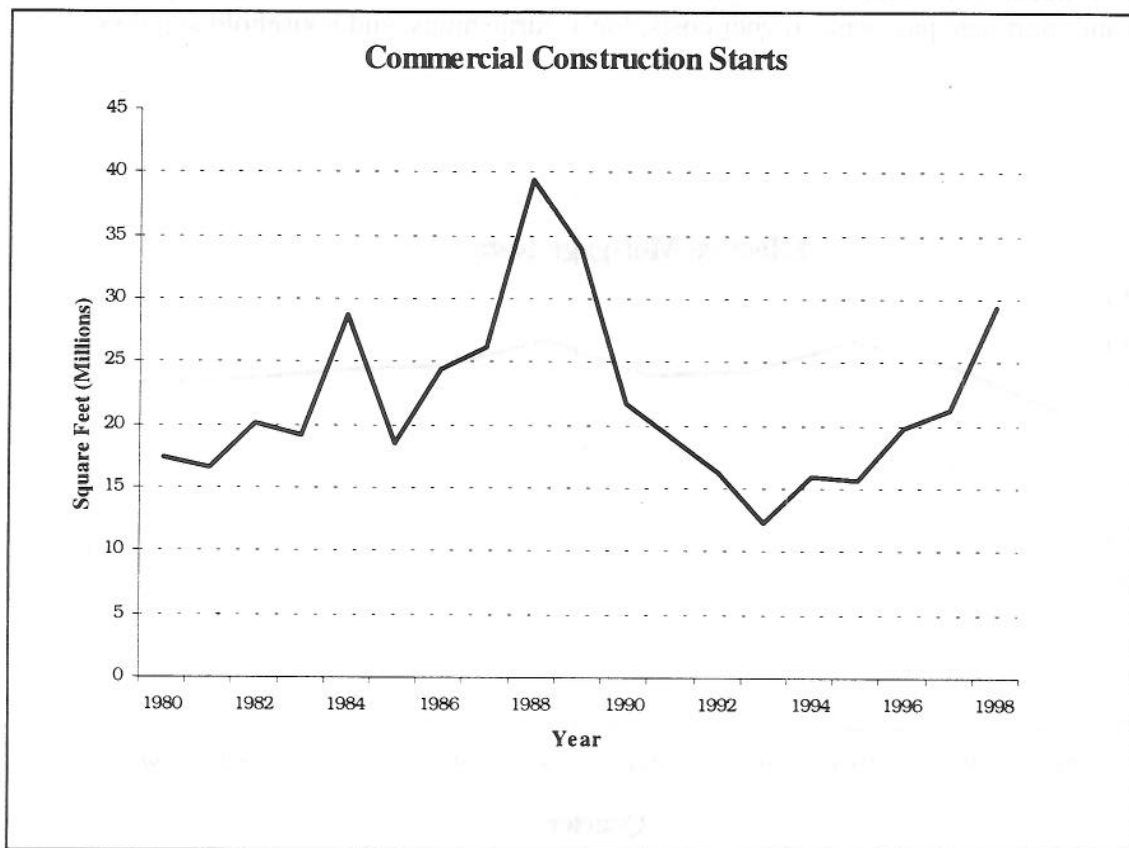
The District of Columbia was home to more federal spending than either Northern Virginia or suburban Maryland, with almost half of the District total going toward salaries and wages. Northern Virginia received a large percentage of its federal funds from procurement contract awards, while suburban Maryland's total was split among procurement, retirement and disability payments, and salaries and wages.



CONSTRUCTION

Construction in the metropolitan Washington region increased significantly during 1998, with developers breaking ground on nearly 29.3 million square feet of commercial space. This was the greatest amount of new commercial development started in the region in any year since 1989, and the third greatest amount of new space started in the region since COG began monitoring commercial construction in the early 1980's. Fairfax County saw the most new commercial construction with more than 6.7 million square feet, followed by Loudoun County with 5.2 million square feet.

The number of new privately owned housing units authorized in the region increased significantly from 26,231 in 1997 to 30,871 in 1998. Of the permits that were issued in 1998, fewer than half were in the inner suburbs.



NEW HOME SALES, MORTGAGE RATES, AND HOUSING INFLATION

Mortgage Rates

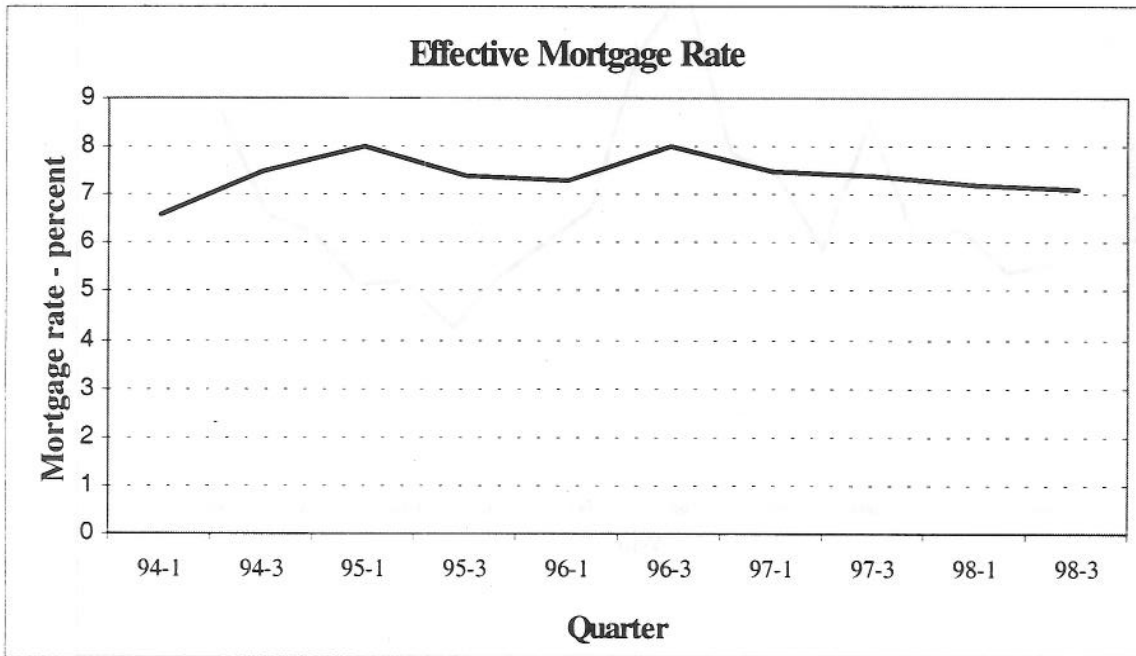
After falling slightly in 1997, mortgage rates continued to fall in 1998, from an average of 7.5 percent in 1997 to 7.1 percent in 1998.

New Homes Sold

The number of new homes sold in the region jumped dramatically, increasing from 19,386 in 1997 to 22,478 in 1998. Nearly all jurisdictions saw increases in the number of new homes sold.

Housing-related Inflation

Housing-related inflation in the region increased to 2.1 percent in 1998 from 0.7 percent in 1997. Nationally, housing inflation was 2.2 percent in 1998. This measure accounts for price changes in rents and mortgage payments, owner costs, fuels, furnishings, and household supplies.

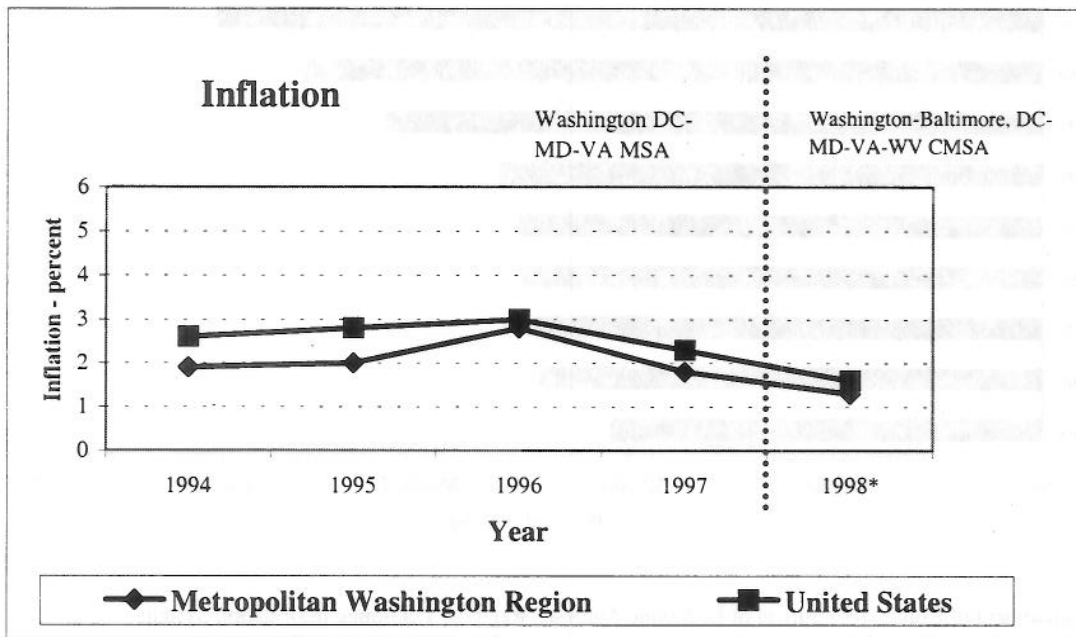


INFLATION

The national Consumer Price Index for All Urban Consumers (CPI-U) increased by only 1.6 percent between 1997 and 1998. Regionally, there was only a 1.3 percent increase. Behind the regional inflation rate were the following topical changes:

Entertainment	*
Medical care	2.3 %
Other goods and services	3.9 %
Transportation	-1.9 %
Food and beverages	1.5 %
Housing	2.1 %
Apparel and upkeep	0.8 %

*Data not available

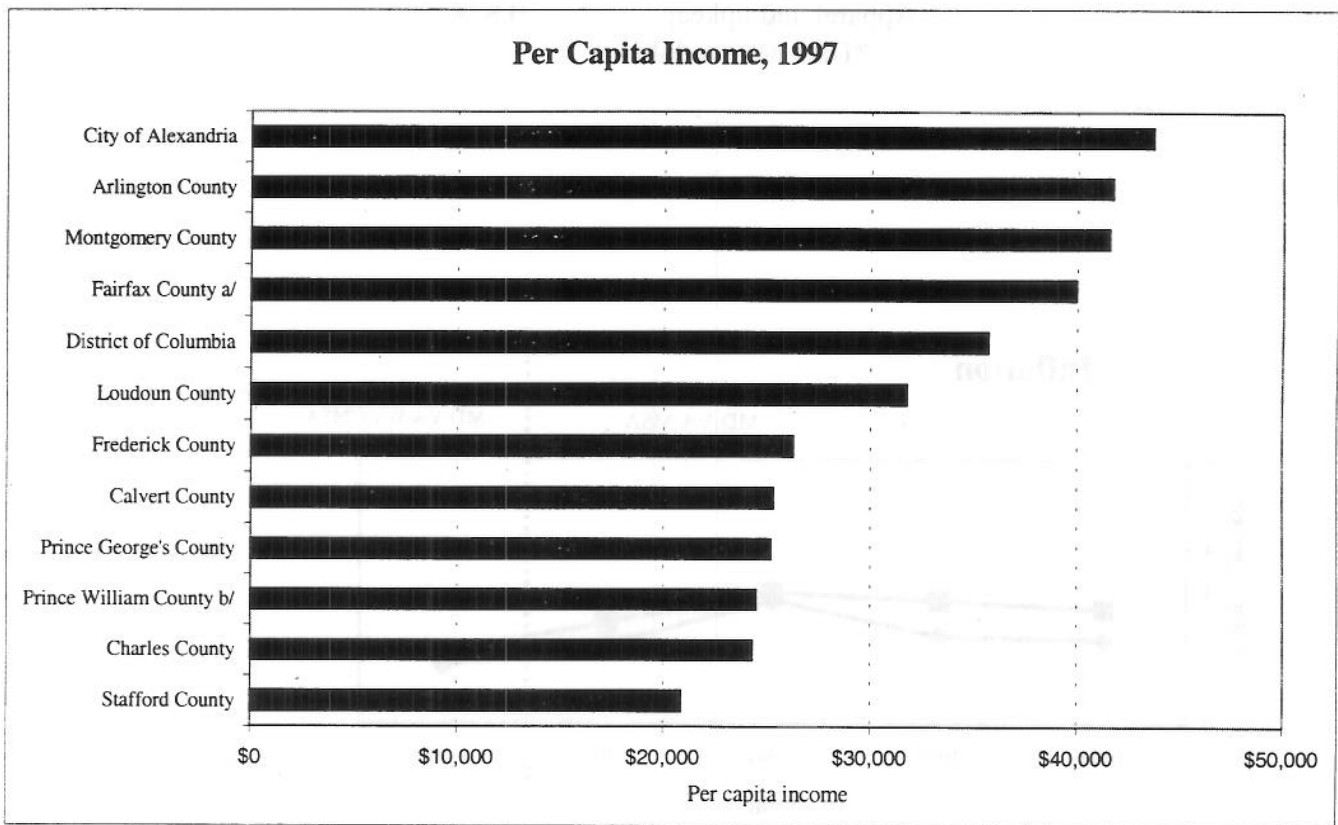


NOTE: CPI data for the Washington DC-MD-VA MSA was discontinued in November 1997. Beginning in 1998, the metropolitan Washington region became a component of the Washington-Baltimore, DC-MD-VA-WV CMSA.

INCOME

Total personal income in the Washington region grew by an average annual rate of 5.5 percent between 1993 and 1997, leading to a 1997 total of \$146 billion. Total income growth was fastest in the outer suburbs, where income increased by an average of 8.4 percent per year.

On a per capita basis, income varied greatly by jurisdiction. The City of Alexandria topped the region in per capita income at \$43,676. Stafford County had the lowest per capita income at \$20,860. The per capita income for the region was \$34,246 in 1997.



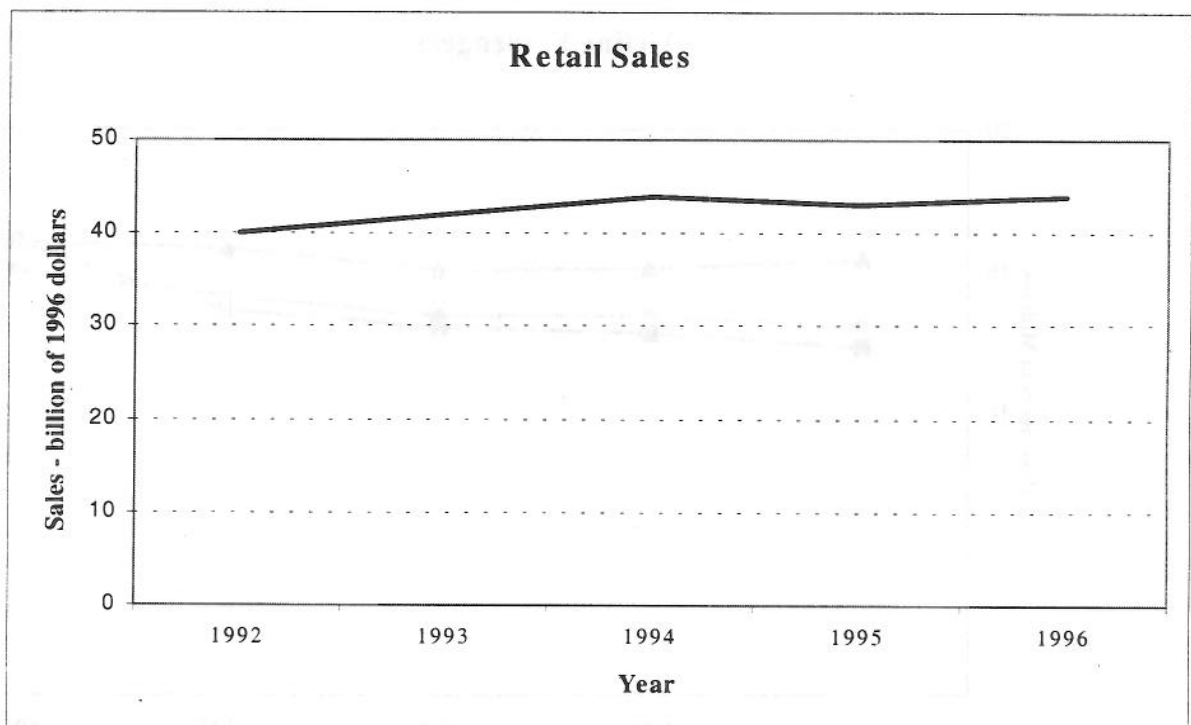
Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System. Data released May 1999. In 1997 BEA completed significant revisions to this data series for 1992 to 1996 period.

a/ Data for the cities of Fairfax and Falls Church is included in Fairfax County.

b/ Data for the cities of Manassas and Manassas Park is included in Prince William County.

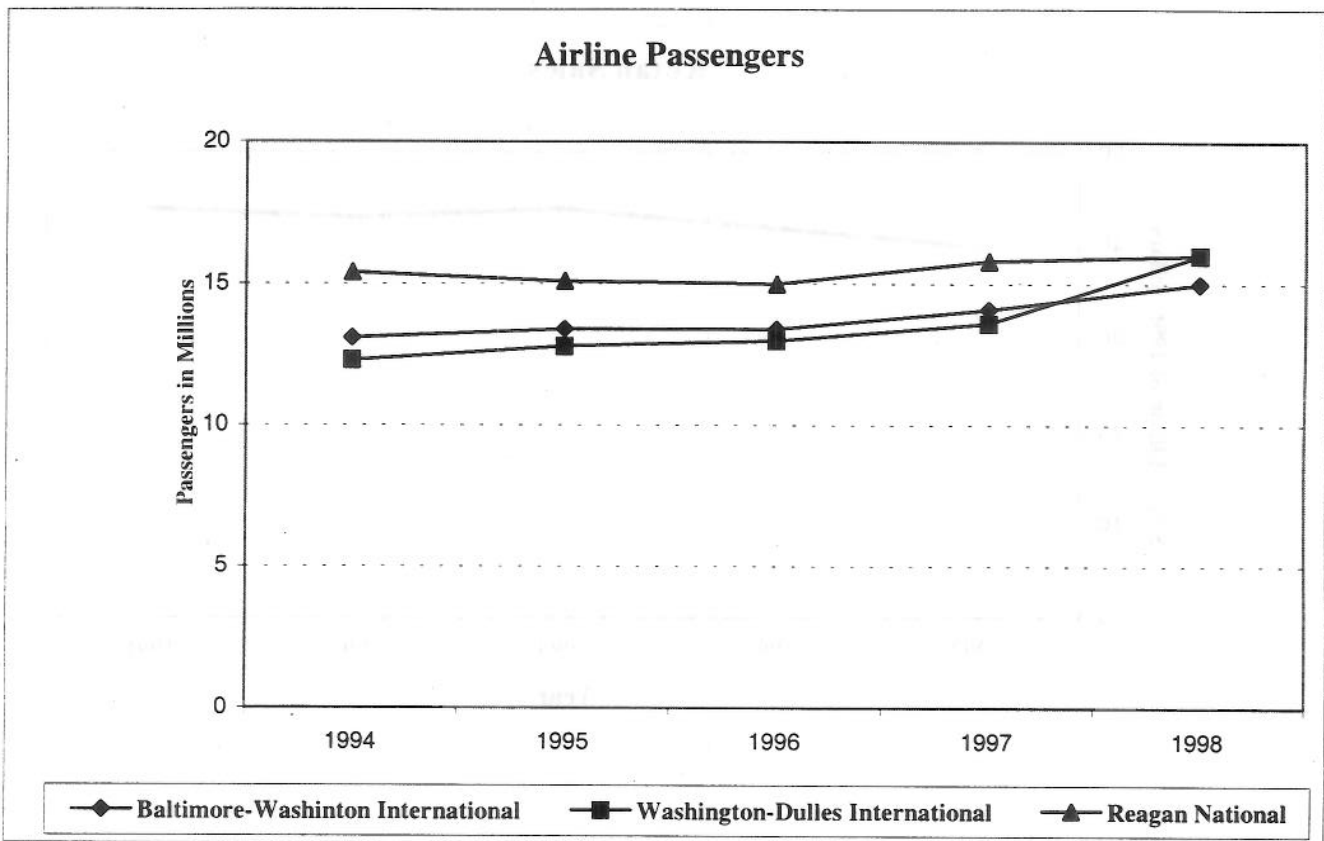
RETAIL SALES

Retail sales in the region increased in both nominal and real terms between 1992 and 1996. After slipping from \$43.7 billion in 1994 to \$43.2 billion in 1995, local retail sales rose to \$44.0 billion in 1996 (all figures in 1996 dollars). National retail sales also rose again in 1996 after declining (in real terms) between 1994 and 1995.



AIRLINE PASSENGERS

More than 46 million passengers flew into or out of the Washington region's three major airports in 1998, a 16.4 percent increase from 1994. Reagan National, with 15.8 million passengers, led the three airports. Dulles served 15.6 million passengers, and Baltimore-Washington International served 15 million.



Detailed Data by Jurisdiction: Economic Trends in Metropolitan Washington, 1994 - 1998

POPULATION¹

The region grew by more than 209,800 people between 1994 and 1998. The majority of this growth occurred in the region's outer suburbs, which increased by 15 percent or 120,900 people. The inner suburbs, with the addition of 126,100 people, grew by 5.1 percent. The region's central jurisdictions had a net loss of 37,200 people, or 4.3 percent, with population decline in the District offsetting increases in Arlington and Alexandria.

Despite the dramatic growth rate in the outer suburbs, the population remains anchored in the inner suburbs, where 60 percent of the region's population lives.

According to COG's Cooperative Forecasts, the inner suburbs will remain the most populous "ring" of the region well into the next century. COG forecasts that in the year 2020, the region will hold more than 5.6 million people (42.9 percent more than the 1990 population). A full 56 percent of the 2020 population is expected to live in the inner suburbs.

¹ Narrative in this section is the same as in the Overview section.

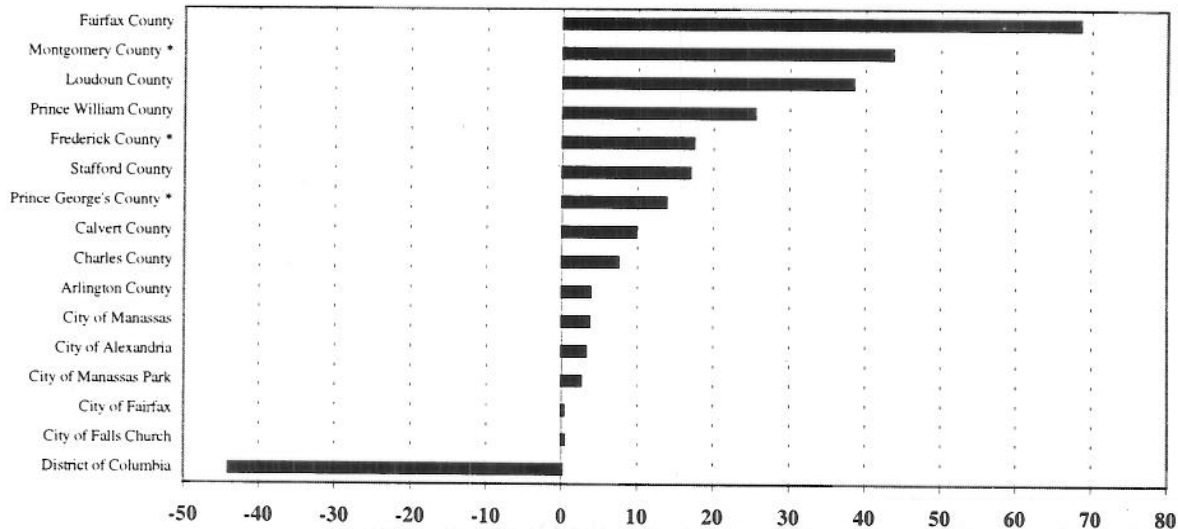
POPULATION

Table 1. Population of the Washington DC-MD-VA MSA, by Jurisdiction, 1994-1998

(Thousands of people)

JURISDICTIONS	1994	1995	1996	1997	1998	Change 1994-1998	
						Number	Percent
District of Columbia	567.1	554.3	543.2	529	523.1	-44.0	-7.8%
Calvert County	62.2	64.6	66.8	70.0	71.9	9.7	15.6%
Charles County	110.6	111.3	113.6	118.1	118.0	7.4	6.7%
Frederick County*	172.6	174.2	180.8	185.5	189.9	17.3	10.0%
City of Frederick*	45.2	46.2	47.5	48.6	49.7	4.5	10.0%
Montgomery County*	798.0	810.0	819.0	832.5	841.5	43.5	5.5%
City of Gaithersburg*	45.8	46.2	47.3	49.1	49.5	3.7	8.1%
City of Rockville*	47.1	47.2	47.5	48.0	48.4	1.3	2.8%
City of Takoma Park*	16.9	17.5	17.5	18.6	18.6	1.7	10.1%
Prince George's County*	764.1	767.4	773.8	776.3	777.8	13.7	1.8%
City of Bowie*	43.2	44.9	45.5	48.7	48.7	5.5	12.7%
City of College Park*	21.3	21.3	23.7	23.7	24.9	3.6	16.9%
City of Greenbelt*	20.6	20.6	20.7	20.9	21.0	0.4	1.9%
Maryland Suburbs	1,907.5	1,927.5	1,954.0	1,982.4	1,999.1	91.6	4.8%
Arlington County	183.4	184.0	185.5	186.4	187.1	3.7	2.0%
City of Alexandria	116.4	117.0	117.3	117.6	119.5	3.1	2.7%
Fairfax County	863.1	879.4	899.7	913.0	931.5	68.4	7.9%
City of Fairfax	20.0	20.0	20.0	20.2	20.3	0.3	1.5%
City of Falls Church	9.8	10.0	10.0	10.0	10.0	0.2	2.0%
Loudoun County	103.5	112.5	123.8	133.5	141.8	38.3	37.0%
Prince William County	243.6	250.0	253.5	260.3	268.9	25.3	10.4%
City of Manassas	30.9	31.7	33.2	34.3	34.5	3.6	11.7%
City of Manassas Park	7.3	8.0	8.0	9.0	9.8	2.5	34.2%
Stafford County	74.2	80.3	82.5	88.3	91.0	16.8	22.6%
Virginia Suburbs	1,652.2	1,692.9	1,733.5	1,772.6	1,814.4	162.2	9.8%
MSA Total	4,126.8	4,174.7	4,230.7	4,284.0	4,336.6	209.8	5.1%
Central Jurisdictions	866.9	855.3	846.0	833.0	829.7	-37.2	-4.3%
Inner Suburbs	2,455.0	2,486.8	2,522.5	2,552.0	2,581.1	126.1	5.1%
Outer Suburbs	804.9	832.6	862.2	899.0	925.8	120.9	15.0%

Population Change, 1994 to 1998 (Thousands)



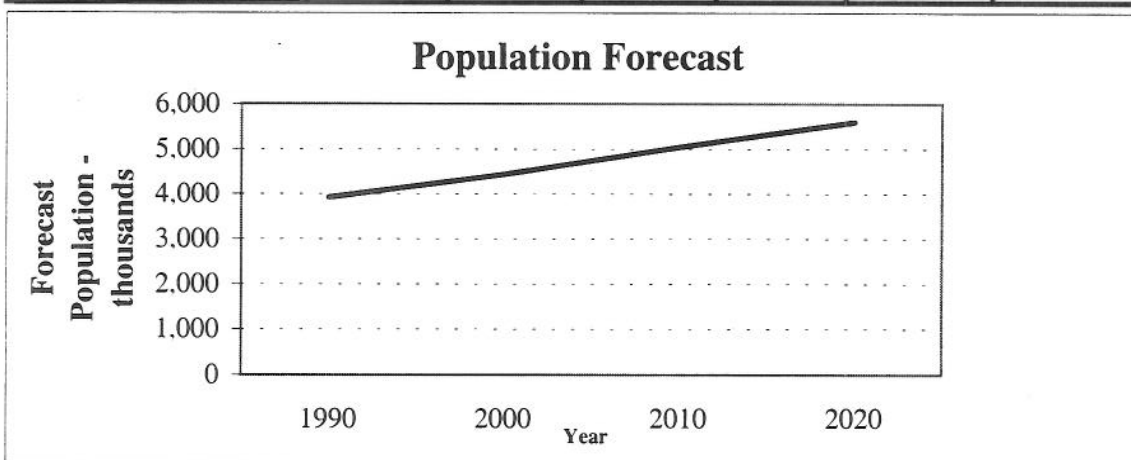
Source: Local government estimates.

* Persons in Maryland cities are included in appropriate county totals.

Table 2. Summary of Forecast of Population, by Jurisdiction
Round 6.1 Cooperative Forecasts for the Washington DC-MD-VA MSA

(Thousands of people)

JURISDICTIONS					Change 1990 - 2020	
	1990	2000	2010	2020	Number	Percent
District of Columbia	606.9	518.1	554.7	618.6	11.7	1.9%
Calvert County	51.4	75.0	95.0	122.5	71.1	138.3%
Charles County	101.2	123.2	150.1	182.9	81.7	80.7%
Frederick County	150.2	194.9	238.3	281.7	131.5	87.5%
Montgomery County	757.0	855.0	945.0	1,000.0	243.0	32.1%
City of Rockville a/	44.8	51.8	59.1	60.0	15.2	33.9%
Prince George's County	729.3	784.6	852.4	916.6	187.3	25.7%
Maryland Suburbs	1,789.1	2,032.7	2,280.8	2,503.7	714.6	39.9%
Arlington County	170.9	192.0	201.4	212.9	42.0	24.6%
City of Alexandria	111.2	127.1	135.3	140.9	29.7	26.7%
Fairfax County	818.6	966.1	1,082.8	1,180.6	362.0	44.2%
City of Fairfax b/	19.6	21.7	22.7	22.8	3.2	16.3%
City of Falls Church	9.6	10.4	10.7	10.9	1.3	13.5%
Loudoun County	86.1	166.1	268.5	371.1	285.0	331.0%
Prince William County	215.7	281.1	342.0	384.2	168.5	78.1%
Independent Cities	34.7	43.2	45.4	46.0	11.3	32.6%
Stafford County c/	61.2	78.6	96.0	113.3	52.1	85.1%
Virginia Suburbs	1,527.6	1,886.3	2,204.8	2,482.7	955.1	62.5%
MSA Total	3,923.6	4,437.1	5,040.3	5,605.0	1,681.4	42.9%
Central Jurisdictions	889.0	837.2	891.4	972.4	83.4	9.4%
Inner Suburbs	2,334.1	2,637.8	2,913.6	3,130.9	796.8	34.1%
Outer Suburbs	700.5	962.1	1,235.3	1,501.7	801.2	114.4%



Source: COG, Round 6.1 Cooperative Forecasts.

a/ Included in Montgomery County total.

b/ Includes Fairfax County group quarters in the Massey Complex, located within boundaries of the City of Fairfax.

c/ Source: Rappahanock Area Development Commission. The estimates for 2020 are control total provided by the Virginia Employment Commission (VEC) and should only be used for transportation planning purposes.

Incremental five-year estimates have been developed for the purpose of transportation modeling and air quality analysis.

EMPLOYMENT

EMPLOYMENT

The Washington region continued to grow at a robust rate in 1998. After increasing from 2.18 million jobs in 1993 to 2.21 million in 1994, the number of jobs in the area rose to 2.4 million in 1998. Job growth in the Washington area has been nearly equivalent to that of the nation, while unemployment remains low— particularly in the region's suburban jurisdictions.

The services sector, including business, health, legal, and other services, remains the core of the region's job market. Nearly two of every five area jobs is in services. And while service jobs have led the region in recovery, losses of federal and state government jobs have limited overall job growth.

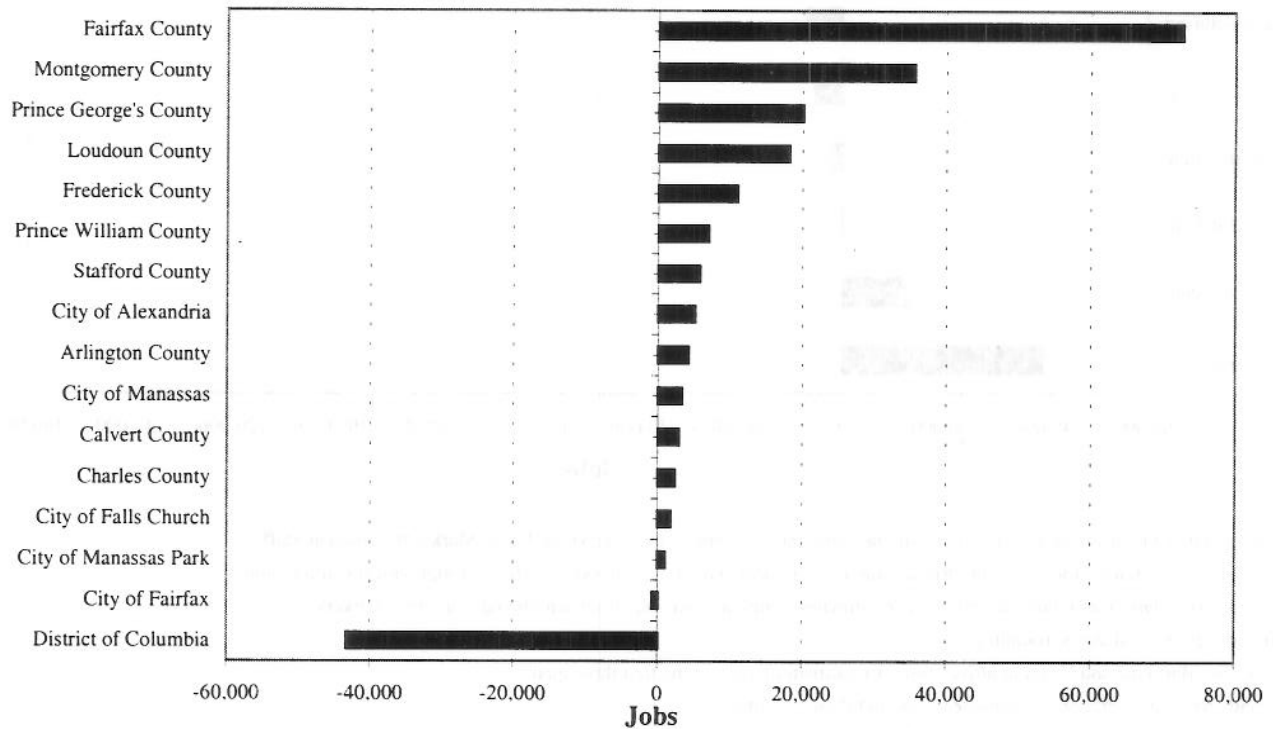
The new jobs have been coming to the inner and outer suburbs. Between 1994 and 1998, the central jurisdictions lost jobs, while the inner and outer suburbs gained. The bulk of area jobs remain in the inner suburbs and central jurisdictions.

According to COG's Cooperative Forecasts, the inner suburbs and central jurisdictions will remain the region's employment center into the next century. In the year 2020, 32 percent of all jobs will be in the central jurisdictions, more than half in the inner suburbs, and 16 percent in the outer suburbs.

Table 3. At-place Employment in the Washington DC-MD-VA MSA, by Jurisdiction, 1994 - 1998
(Nonagricultural wage and salary jobs - annual average)

JURISDICTIONS	1994	1995	1996	1997	1998*	Change 1994 - 1998
District of Columbia	658,700	643,300	623,000	618,400	615,400	-43,300
Calvert County	12,939	13,912	14,349	15,107	15,762	2,823
Charles County	31,587	33,010	33,748	33,229	33,882	2,295
Frederick County	58,235	60,201	62,831	66,919	69,093	10,858
Montgomery County	376,871	381,454	384,354	399,704	412,428	35,557
Prince George's County	271,294	276,519	280,492	289,181	291,301	20,007
Maryland Suburbs	750,926	765,096	775,774	804,140	822,466	71,540
Arlington County	151,018	155,704	159,793	158,745	155,160	4,142
City of Alexandria	80,375	81,695	82,547	83,683	85,384	5,009
Fairfax County	401,043	414,952	428,806	452,892	473,757	72,714
City of Fairfax	16,895	16,155	15,742	16,126	16,146	-749
City of Falls Church	12,460	12,564	12,106	13,837	14,206	1,746
Loudoun County	45,760	49,907	53,906	59,691	63,842	18,082
Prince William County	62,769	64,820	67,504	68,613	69,619	6,850
City of Manassas	16,598	16,790	16,971	19,053	19,826	3,228
City of Manassas Park	1,632	1,994	2,146	2,454	2,599	967
Stafford County	14,207	15,819	16,882	18,003	19,894	5,687
Virginia Suburbs	802,757	830,400	856,403	893,097	920,433	117,676
MSA Total	2,212,383	2,238,796	2,255,177	2,315,637	2,358,299	145,916
Central Jurisdictions	890,093	880,699	865,340	860,828	855,944	-34,149
Inner Suburbs	1,078,563	1,101,644	1,121,500	1,171,740	1,207,838	129,275
Outer Suburbs	243,727	256,453	268,337	283,069	294,517	50,790

Change in Number of Jobs, 1994 to 1998



Source: Compiled by COG from the District of Columbia Department of Employment Services, Labor Market Information Staff; Maryland Department of Labor, Licensing and Regulation, Employment and Payrolls Reports; Virginia Employment Commission, Research and Analysis Division. Figures do not include estimates of military personnel, self-employed, and other workers. Figures may not sum to total due to rounding.

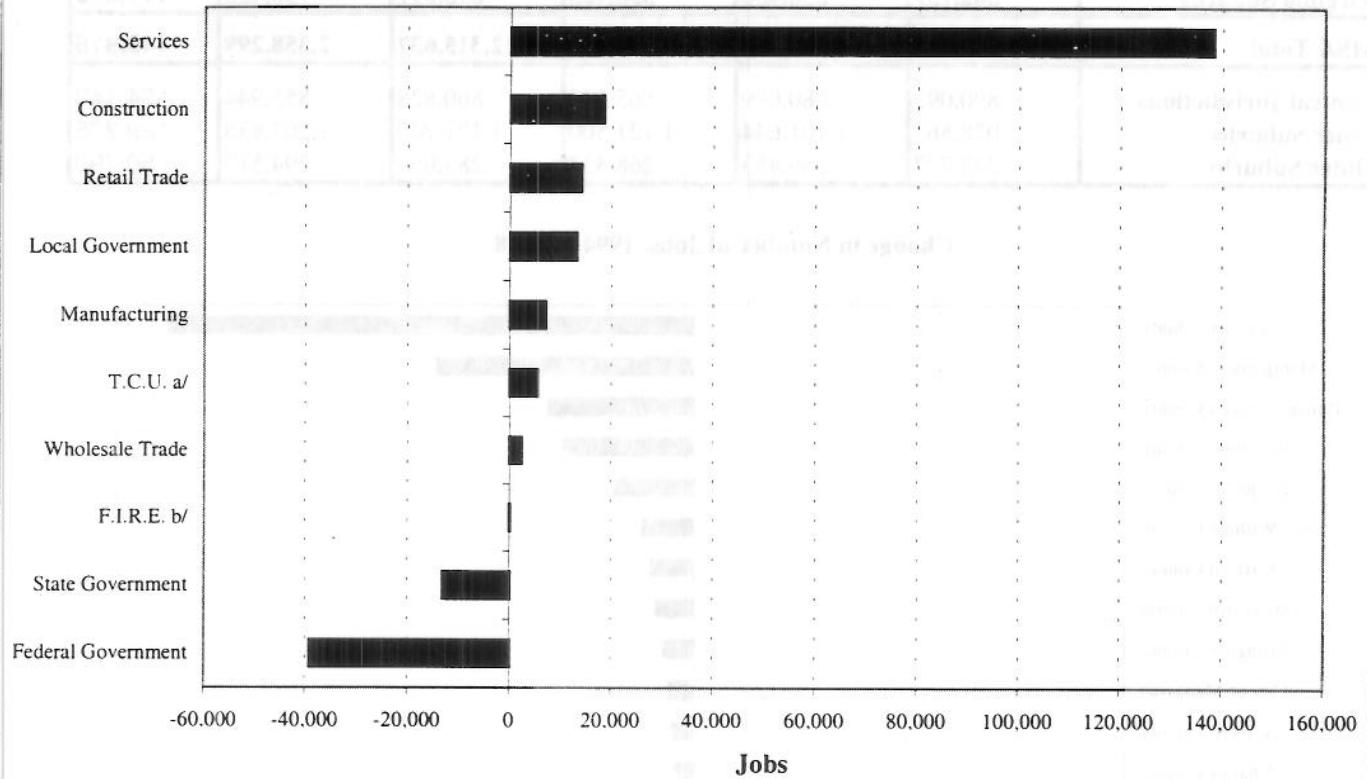
* 1998 Figures for Maryland and Virginia jurisdictions are estimates based on the first three quarters.

EMPLOYMENT

Table 4. At-place Employment in the Washington DC-MD-VA MSA, by Industrial Group, 1994-1998
(Nonagricultural wage and salary jobs - annual average)

INDUSTRY SECTOR	1994	1995	1996	1997	1998*	Change 1994-1998
Manufacturing	80,831	80,277	81,908	86,318	87,796	6,965
Construction	103,910	105,716	108,112	116,171	122,253	18,343
T.C.U. a/	103,547	104,826	104,483	105,937	108,938	5,391
Wholesale Trade	71,707	75,438	74,865	75,151	73,961	2,254
Retail Trade	348,137	357,170	358,030	363,048	362,097	13,960
F.I.R.E. b/	133,096	127,549	124,875	128,410	133,064	-32
Services	783,470	814,795	839,828	885,051	921,597	138,127
Federal Government	365,644	351,016	341,106	332,774	326,502	-39,142
Local Government	145,924	150,139	152,782	156,523	159,028	13,104
State Government	76,117	71,870	69,188	66,254	63,063	-13,054
Total	2,212,383	2,238,796	2,255,177	2,315,637	2,358,299	145,916

Change in Employment by Sector, 1994 to 1998



Source: Compiled by COG from the District of Columbia Department of Employment Services, Labor Market Information Staff; Maryland Department of Labor, Licensing and Regulation, Employment and Payrolls Reports; Virginia Employment Commission, Research and Analysis Division. Figures do not include estimates of military personnel, self-employed, and other workers.

Figures may not sum to total due to rounding.

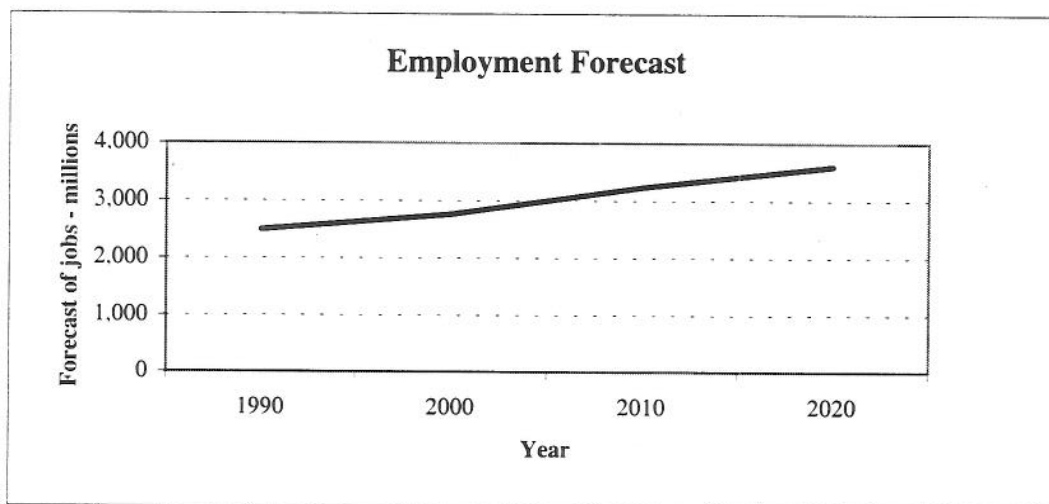
* 1998 figures for Maryland and Virginia jurisdictions are estimates based on the first three quarters.

a/ T.C.U. stands for Transportation, Communications, and Public Utilities.

b/ F.I.R.E. stands for Finance, Insurance, and Real Estate.

Table 5. Summary of Forecast of Employment, by Jurisdiction
Round 6.1 Cooperative Forecasts for the Washington DC-MD-VA MSA
 (Thousands of Jobs)

JURISDICTIONS					Change 1990-2020	
	1990	2000	2010	2020	Number	Percent
District of Columbia	747.3	678.0	725.7	776.8	29.5	3.9%
Calvert County a/	18.1	24.8	28.3	29.7	11.6	64.1%
Charles County	38.7	50.6	58.2	61.4	22.7	58.7%
Frederick County	54.0	99.7	120.7	148.5	94.5	175.0%
Montgomery County b/	466.0	513.0	602.0	648.0	182.0	39.1%
City of Rockville c/	56.9	73.0	83.0	86.6	29.7	52.3%
Prince George's County	310.4	325.3	385.2	449.1	138.8	44.7%
Maryland Suburbs	887.1	1,013.4	1,194.4	1,336.7	449.6	50.7%
Arlington County	183.1	201.2	236.9	275.4	92.3	50.4%
City of Alexandria	93.2	98.6	110.4	115.9	22.7	24.3%
Fairfax County	403.7	526.4	644.4	701.3	297.6	73.7%
City of Fairfax d/	26.9	30.8	32.6	32.7	5.8	21.6%
City of Falls Church	9.2	9.4	9.6	9.7	0.5	5.5%
Loudoun County	39.3	72.7	112.7	152.7	113.5	289.1%
Prince William County	68.8	90.6	118.5	141.2	72.4	105.3%
Independent Cities	18.7	21.6	24.7	25.4	6.7	36.1%
Stafford County e/	11.0	18.2	25.4	32.5	21.5	195.5%
Virginia Suburbs	853.8	1,069.6	1,315.2	1,486.8	633.0	74.1%
MSA Total	2,488.3	2,761.1	3,235.3	3,600.4	1,112.1	44.7%
Central Jurisdictions	1,023.6	977.8	1,073.0	1,168.1	144.4	14.1%
Inner Suburbs	1,273.0	1,478.0	1,756.7	1,927.4	654.4	51.4%
Outer Suburbs	248.5	378.3	488.6	591.5	343.0	138.0%



Source: COG, Round 6.1 Cooperative Forecasts. Includes forecasts of military, self-employed, mining, and other jobs.

a/ Tri-County Council for Southern Maryland develops ten-year incremental population, housing unit, and employment forecasts for Calvert County, Charles County, and St. Mary's County.

b/ Forecasts for years 2000 to 2020 include all of Takoma Park.

c/ Included in Montgomery County total.

d/ Totals for all years include Fairfax County government employees working in the Massey Complex, located within the City of Fairfax boundaries.

e/ Source: Rappahanock Area Development Commission, November 1997.

FEDERAL SPENDING

FEDERAL SPENDING

Federal spending in the Washington region increased to \$65.3 billion in 1998, from \$62.3 billion in 1997. More than 37 percent, or \$24 billion, came in procurement contract awards which, for the second time, exceeded expenditures in the region for salaries and wages. Nearly \$21 billion, or more than 32 percent of the spending, was in the form of salaries and wages. More than 29 percent of the region's federal spending was from the Department of Defense.

The District of Columbia was home to more federal spending than either Northern Virginia or suburban Maryland, with almost half of the District total going toward salaries and wages. Northern Virginia received a large percentage of its federal funds from procurement contract awards, while suburban Maryland's total was split among procurement, direct payments to individuals, and salaries and wages.

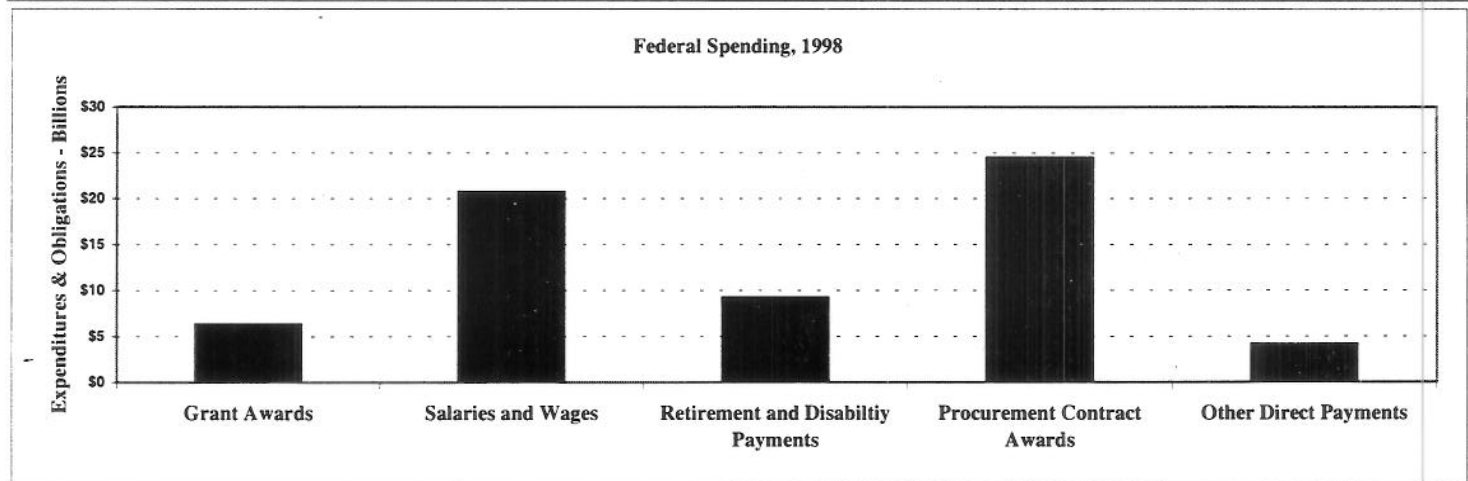
Region	1997	1998	% Change	Salaries and Wages	Procurement	Other
Washington Region	\$62.3	\$65.3	4.8%	\$20.5	\$24.0	\$20.8
District of Columbia	\$12.5	\$13.5	8.0%	\$6.0	\$4.0	\$3.5
Northern Virginia	\$15.0	\$16.0	6.7%	\$3.0	\$10.0	\$2.0
Suburban Maryland	\$10.0	\$10.5	5.0%	\$4.0	\$4.0	\$2.5
Rest of Region	\$24.8	\$25.3	2.0%	\$7.5	\$6.0	\$12.3



Table 6. Direct Federal Expenditures and Obligations in the Washington DC-MD-VA MSA, by Jurisdiction, FY 1998

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Retirement and Disability Payments	Procurement Contract Awards	Other Direct Payments	Total	1998 Total	
							Department of Defense	Non-Defense
District of Columbia	\$4,101,064	\$11,435,809	\$1,682,581	\$5,200,075	\$1,614,878	\$24,034,407	\$2,273,659	\$21,760,748
Calvert County	21,694	7,131	140,292	5,818	40,899	\$215,834	24,485	191,349
Charles County	51,809	159,312	237,869	44,185	75,087	\$568,262	219,725	348,537
Frederick County	68,297	150,944	299,424	81,303	100,258	\$700,226	163,110	537,116
Montgomery County	645,072	2,618,081	1,731,163	3,497,512	590,187	\$9,082,015	1,733,188	7,348,826
Prince George's County	552,437	1,620,212	1,592,348	2,511,389	541,932	\$6,818,318	1,284,888	5,533,430
Maryland Suburbs	\$1,339,309	\$4,555,680	\$4,001,096	\$6,140,207	\$1,348,363	\$17,384,655	\$3,425,396	\$13,959,258
Arlington County	131,727	2,559,419	431,132	2,279,530	132,292	\$5,534,100	3,072,714	2,461,387
City of Alexandria	85,526	451,776	455,462	1,063,993	145,482	\$2,202,239	1,297,666	904,573
Fairfax County	272,185	860,218	1,584,946	7,120,328	561,386	\$10,399,063	5,580,838	4,818,225
City of Fairfax	55,131	44,351	213,282	1,354,231	70,052	\$1,737,047	741,981	995,065
City of Falls Church	162,781	208,259	81,901	386,207	32,996	\$872,144	417,585	454,559
Loudoun County	18,149	207,933	167,311	134,464	45,973	\$573,830	97,002	476,829
Prince William County	55,972	330,615	394,726	205,323	62,740	\$1,049,376	612,673	436,703
City of Manassas	22,292	20,856	76,191	511,942	29,997	\$661,278	457,548	203,730
City of Manassas Park	1,598	752	770	2,600	1,483	\$7,203	3,059	4,144
Stafford County	25,865	7,697	134,223	11,369	20,683	\$199,837	50,235	149,602
Virginia Suburbs	\$831,226	\$4,691,876	\$3,539,944	\$13,069,987	\$1,103,084	\$23,236,117	\$12,331,301	\$10,904,817
MSA Total	\$6,271,599	\$20,683,365	\$9,223,621	\$24,410,269	\$4,066,325	\$64,655,179	\$18,030,356	\$46,624,823
Percentage of Total	9.7%	32.0%	14.3%	37.8%	6.3%	100.0%	27.6%	71.5%
Central Jurisdictions	4,318,317	14,447,004	2,569,175	8,543,598	1,892,652	31,770,746	6,644,039	25,126,708
Inner Suburbs	1,687,606	5,351,121	5,203,640	14,869,667	1,796,553	28,908,587	9,758,480	19,150,105
Outer Suburbs	265,676	885,240	1,450,806	997,004	377,120	3,975,846	1,627,837	2,348,010

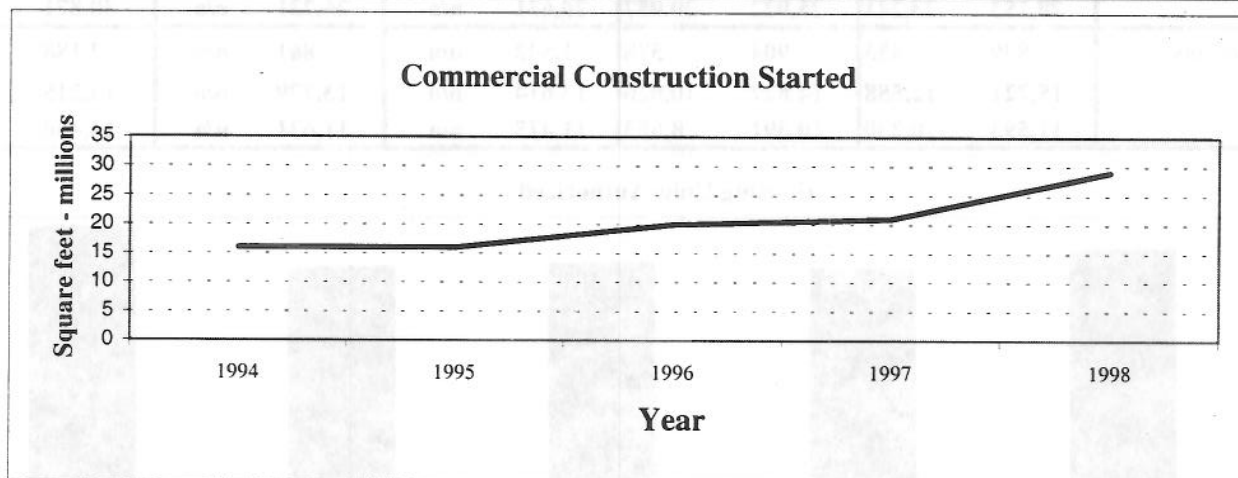


Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY 1998.

NOTE: Grant locations represent location of initial recipient. Salary and wage locations represent place of employment. Procurement location is the place of performance, and other data are assigned to the recipient location.

Table 7. Total Square Feet of Commercial Construction Started, by Jurisdiction, 1994-1998

JURISDICTIONS	1994	1995	1996	1997	1998	Total 1994-1998
District of Columbia	2,055,248	1,562,112	3,658,324	1,147,461	4,270,489	12,693,634
Calvert County	a/	a/	a/	a/	a/	a/
Charles County	360,073	316,501	500,585	564,552	632,100	2,373,811
Frederick County*	1,223,810	1,797,975	1,272,502	1,759,266	1,493,029	7,546,582
City of Frederick*	708,700	295,548	166,065	153,993	1,357,354	2,681,660
Montgomery County*	1,481,769	1,357,582	2,011,428	4,799,968	4,282,856	13,933,603
City of Gaithersburg*	236,025	148,269	49,350	377,267	723,323	1,534,234
City of Rockville*	212,000	79,948	310,363	428,647	636,997	1,667,955
City of Takoma Park (pt)*	0	0	0	0	0	n/a
Prince George's County*	2,974,816	2,783,595	4,775,211	2,287,690	2,651,753	15,473,065
City of Bowie*	31,441	328,400	379,835	81,642	262,819	1,084,137
City of College Park*	23,750	316,610	914,282	194,000	66,758	1,515,400
City of Greenbelt*	3,000	7,900	7,536	0	0	18,436
Maryland Suburbs	6,040,468	6,255,653	8,559,726	9,411,476	9,059,738	39,327,061
Arlington County	2,740,753	711,106	304,636	1,154,807	767,806	5,679,108
City of Alexandria	45,100	208,988	916,958	946,374	769,717	2,887,137
Fairfax County	2,614,577	3,424,528	3,139,504	5,432,576	6,710,346	21,321,531
City of Fairfax	195,600	55,310	38,000	229,875	106,758	625,543
City of Falls Church	0	15,233	0	89,017	14,600	118,850
Loudoun County	1,307,033	1,319,049	2,027,147	1,730,702	5,234,257	11,618,188
Prince William County b/	956,349	2,108,601	1,079,812	1,124,172	2,390,652	7,659,586
Stafford County	a/	a/	a/	a/	a/	a/
Virginia Suburbs	7,859,412	7,842,815	7,506,057	10,707,523	15,994,136	49,909,943
Region Total	15,955,128	15,660,580	19,724,107	21,266,460	29,324,363	101,930,638
Central Jurisdictions	4,841,101	2,482,206	4,879,918	3,248,642	5,808,012	21,259,879
Innner Suburbs	7,266,762	7,636,248	9,964,143	12,839,126	13,766,313	51,472,592
Outer Suburbs	3,847,265	5,542,126	4,880,046	5,178,692	9,750,038	29,198,167



*Starts in Maryland cities are included in appropriate county totals.

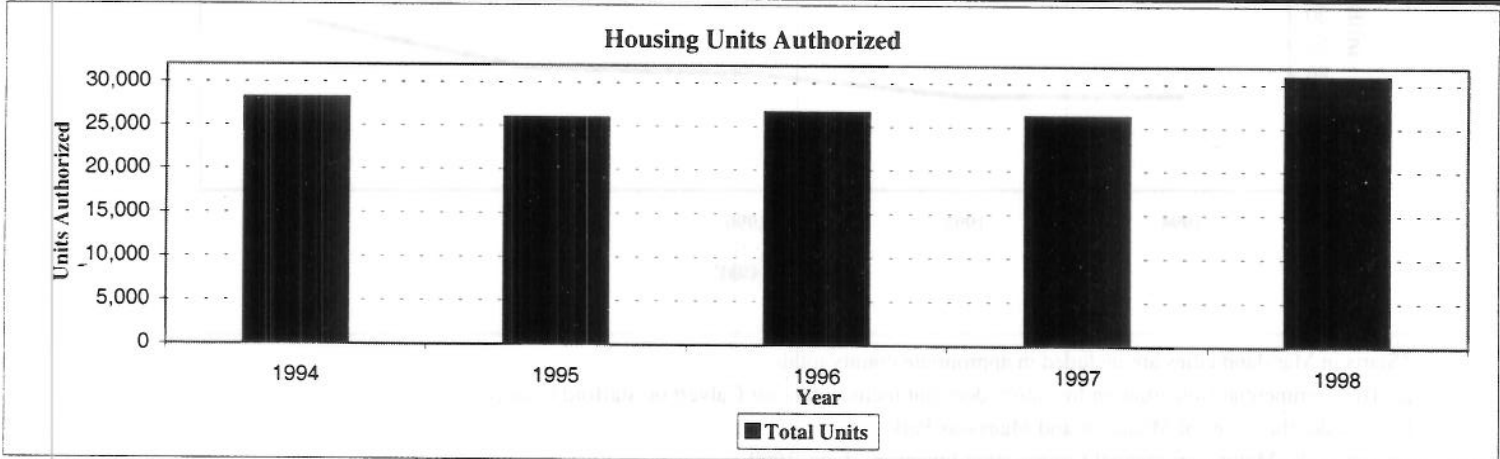
a/ The Commercial Construction Inventory does not include data for Calvert or Stafford County

b/ Includes the Cities of Manassas and Manassas Park.

Source: COG Major Commercial Construction Inventory, June, 1999.

**Table 8. New Privately Owned Housing Units Authorized
in the Washington DC-MD-VA MSA, by Jurisdiction 1994-1998**

JURISDICTIONS	1994		1995		1996		1997		1998	
	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family	Total	Single Family
District of Columbia	210	96	35	35	0	0	0	0	429	n/a
Calvert County	880	856	1,210	764	813	n/a	786	n/a	782	n/a
Charles County	1,060	1,046	1,051	1,051	1,175	n/a	1,264	n/a	1,469	n/a
Frederick County*	1,891	1,601	1,525	1,340	1,646	n/a	1,815	n/a	1,310	n/a
City of Frederick*	607	384	314	278	323	n/a	396	n/a	584	n/a
Montgomery County*	3,590	2,976	3,682	2,833	2,843	n/a	2,992	n/a	3,835	n/a
City of Gaithersburg*	333	291	191	135	171	n/a	479	n/a	825	n/a
City of Rockville*	49	49	23	23	88	n/a	170	n/a	655	n/a
City of Takoma Park*	n/a	n/a	n/a	n/a	0	n/a	0	n/a	0	n/a
Prince George's County*	4,242	3,800	3,584	3,474	3,471	n/a	3,561	n/a	4,224	n/a
City of Bowie*	n/a	n/a	n/a	n/a	0	n/a	0	n/a	0	n/a
City of College Park*	n/a	n/a	n/a	n/a	0	n/a	0	n/a	0	n/a
City of Greenbelt*	n/a	n/a	n/a	n/a	0	n/a	0	n/a	0	n/a
City of Takoma Park (pt)*	n/a	n/a	n/a	n/a	0	n/a	n/a	n/a	n/a	n/a
Maryland Suburbs	11,663	10,279	11,052	9,462	9,948	n/a	10,418	n/a	11,620	n/a
Arlington County	344	168	618	328	471	n/a	117	n/a	459	n/a
City of Alexandria	285	189	251	215	1,071	n/a	744	n/a	1,300	n/a
Fairfax County	7,795	5,688	7,226	4,446	7,187	n/a	7,098	n/a	7,096	n/a
City of Fairfax	92	92	132	70	107	n/a	84	n/a	58	n/a
City of Falls Church	2	2	3	3	6	n/a	4	n/a	2	n/a
Loudoun County	3,811	3,046	2,802	2,450	3,191	n/a	3,671	n/a	5,433	n/a
Prince William County	2,309	2,095	2,574	1,837	2,999	n/a	2,878	n/a	2,797	n/a
City of Manassas	219	209	201	201	166	n/a	118	n/a	74	n/a
City of Manassas Park	107	107	48	48	93	n/a	95	n/a	148	n/a
Stafford County	1,316	1,270	980	962	1,392	n/a	1,004	n/a	1,455	n/a
Virginia Suburbs	16,280	12,866	14,835	10,560	16,683	n/a	15,813	n/a	18,822	n/a
MSA Total	28,153	23,241	25,922	20,057	26,631	n/a	26,231	n/a	30,871	n/a
Central Jurisdictions	839	453	904	578	1,542	n/a	861	n/a	2,188	n/a
Inner Suburbs	15,721	12,558	14,627	10,826	13,614	n/a	13,739	n/a	15,215	n/a
Outer Suburbs	11,593	10,230	10,391	8,653	11,475	n/a	11,631	n/a	13,468	n/a



Source: U.S. Department of Commerce, Bureau of the Census, 1998 Annual Report, "Permit Authorized Construction in Permit-issuing places by Metropolitan Area."

NEW HOME SALES, MORTGAGE RATES,
AND HOUSING INFLATION

Mortgage Rates

After falling slightly in 1997, mortgage rates continued to fall in 1998, from an average of 7.5 percent in 1997 to 7.1 percent in 1998.

New Homes Sold

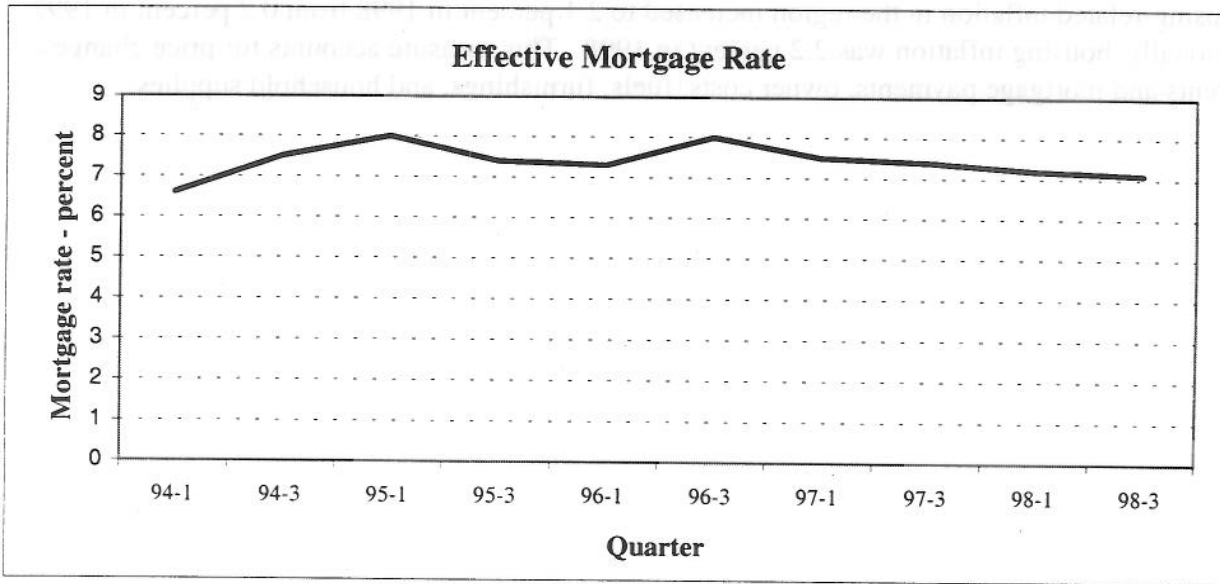
The number of new homes sold in the region jumped dramatically, increasing from 19,386 in 1997 to 22,478 in 1998. Nearly all jurisdictions saw increases in the number of new homes sold.

Housing-related Inflation

Housing-related inflation in the region increased to 2.1 percent in 1998 from 0.7 percent in 1997. Nationally, housing inflation was 2.2 percent in 1998. This measure accounts for price changes in rents and mortgage payments, owner costs, fuels, furnishings, and household supplies.

Table 9. Terms on Conventional Home Morgages, Averages for Closed Loans in the Washington-Baltimore DC-MD-VA-WV CMSA, 1994-1998

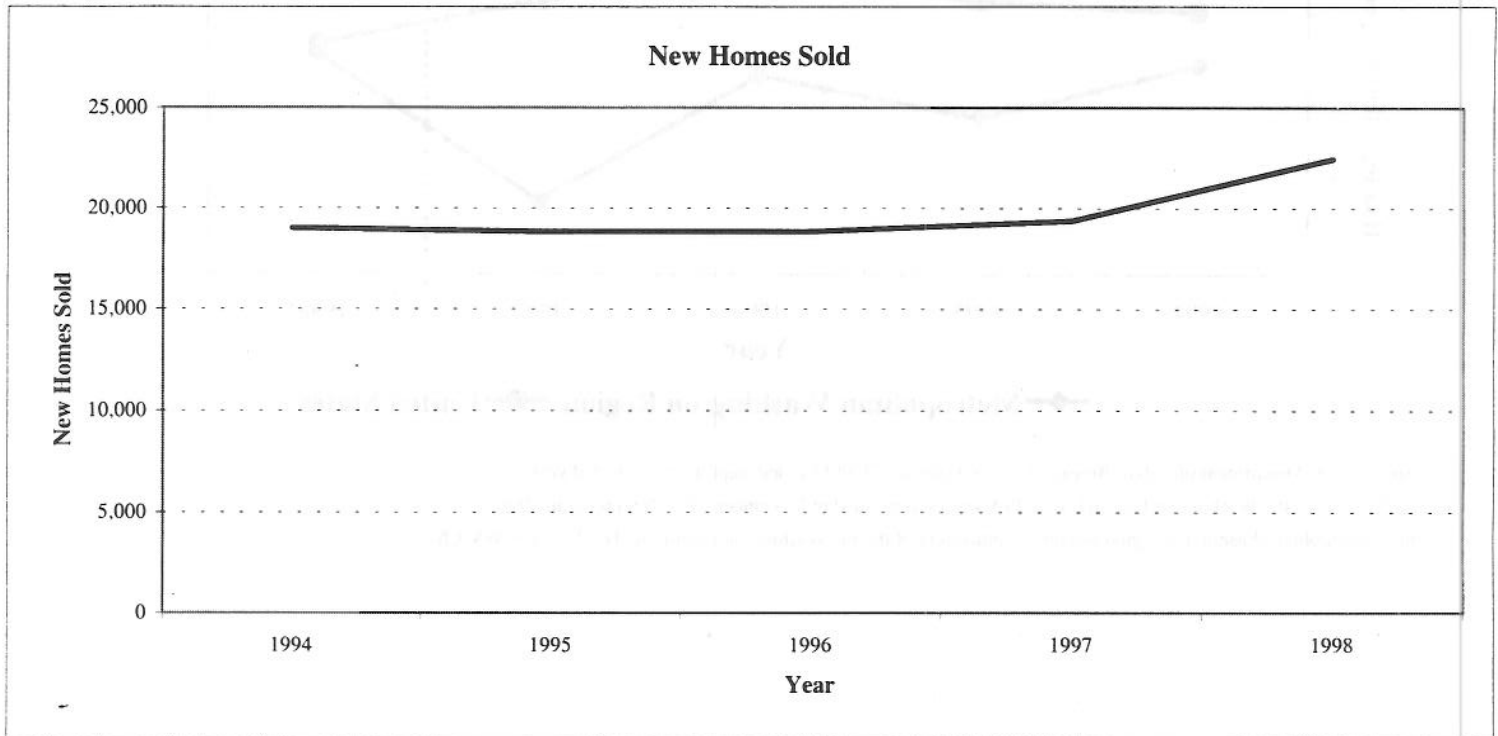
Quarter	Year				
	1994	1995	1996	1997	1998
First Quarter	6.6	8.0	7.3	7.5	7.2
Second Quarter	7.2	7.6	7.7	7.6	7.2
Third Quarter	7.5	7.4	8.0	7.4	7.1
Fourth Quarter	7.7	7.2	7.8	7.3	6.9



Source: Federal Housing Finance Board News Report. Terms on Conventional Home Morgages, Averages for Metropolitan Areas: Loans Closed.

Table 10. Net New Home Sales for Selected Jurisdictions, 1994-1998

JURISDICTIONS	Year					Change 1997-1998	
	1994	1995	1996	1997	1998	Number	Percent
District of Columbia	271	220	290	293	242	-51	-17%
Calvert County	a/	a/	a/	a/	a/	a/	a/
Charles County	649	659	590	757	1,076	319	42%
Frederick County	1,205	1,286	1,411	1,415	1,584	169	12%
Montgomery County	2,752	2,545	2,760	3,077	3,177	100	3%
Prince George's County	3,169	3,154	3,111	2,747	2,885	138	5%
Maryland Suburbs	7,775	7,644	7,872	7,996	8,722	726	9%
Alexandria/Arlington b/	747	743	529	721	1,203	482	67%
Fairfax County c/	4,537	4,520	4,175	3,916	4,465	549	14%
Loudoun County	2,610	2,566	2,793	3,230	3,944	714	22%
Prince William County d/	2,218	2,420	2,472	2,461	3,229	768	31%
Stafford County	854	723	717	769	673	-96	-12%
Virginia Suburbs	10,966	10,972	10,686	11,097	13,514	2,417	22%
Region Total	19,012	18,836	18,848	19,386	22,478	3,092	16%
Central Jurisdictions	1,018	963	819	1,014	1,445	431	43%
Inner Suburbs	10,458	10,219	10,046	9,740	10,527	787	8%
Outer Suburbs	7,536	7,654	7,983	8,632	10,506	1,874	22%



Source: Meyers Housing Data Reports, 1999. Includes single-family, townhomes, and condominiums.

a/ Data not available.

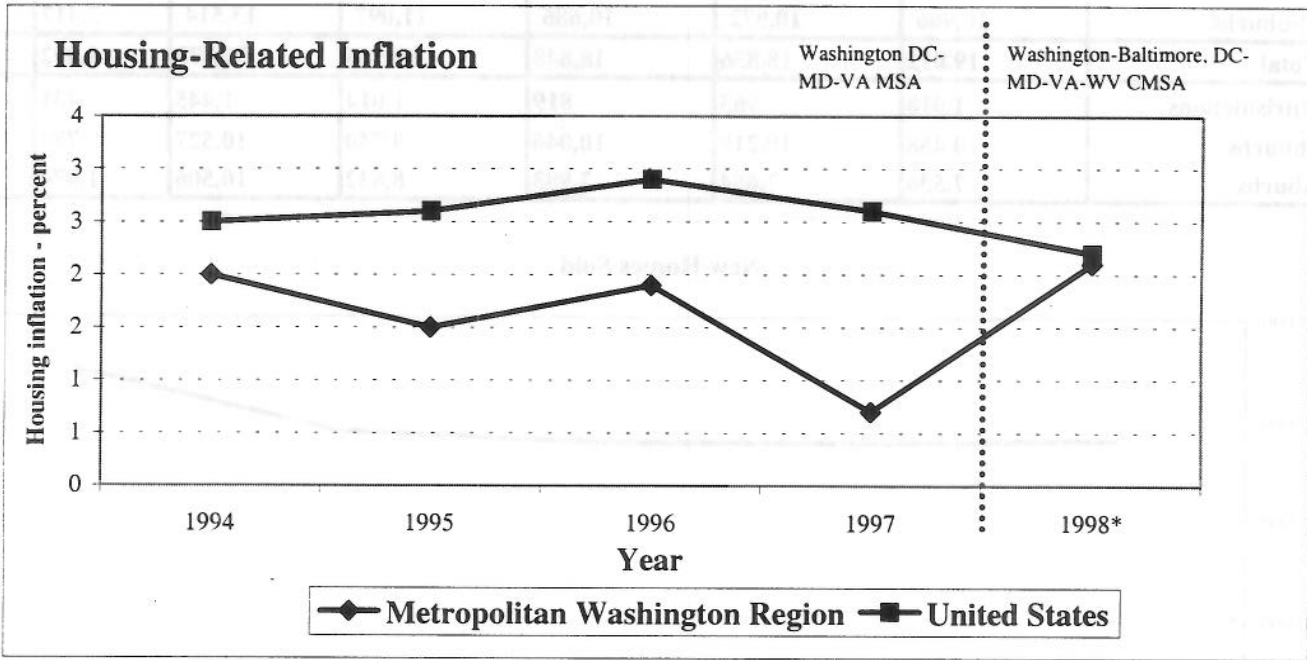
b/ Data could not be broken down for individual jurisdiction.

c/ Includes Cities of Falls Church and Fairfax.

d/ Includes Cities of Manassas and Manassas Park.

Table 11. Housing Component of the Consumer Price Index
All Urban Consumers, Washington DC-MD-VA MSA, 1994-1998
 (1982-1984=100)

	1994	1995	1996	1997	1998*
Metropolitan Washington Region					
CPI-U, Housing	150.9	153.1	156.0	157.1	103.1
Housing Inflation Rate (%)	2.0	1.5	1.9	0.7	2.1
United States					
CPI-U, Housing	144.8	148.5	152.8	156.8	161.8
Housing Inflation Rate (%)	2.5	2.6	2.9	2.6	2.2



Source: U.S. Department of Labor, Bureau of Labor Statistics, "CPI Detailed Reports" for selected years.

* CPI data for the Washington DC-MD-VA MSA was discontinued in November 1997. Beginning in 1998,

the Metropolitan Washington region became a component of the the Washington-Baltimore, DC-MD-VA-WV CMSA.

INFLATION

The national Consumer Price Index for All Urban Consumers (CPI-U) increased by only 1.6 percent between 1997 and 1998. Regionally, there was only a 1.3 percent increase. Behind the regional inflation rate were the following topical changes:

		Entertainment			*
		Medical care			2.3 %
		Other goods and services			3.9 %
		Transportation			-1.9 %
		Food and beverages			1.5 %
		Housing			2.1 %
		Apparel and upkeep			0.8 %
		* Data not available			

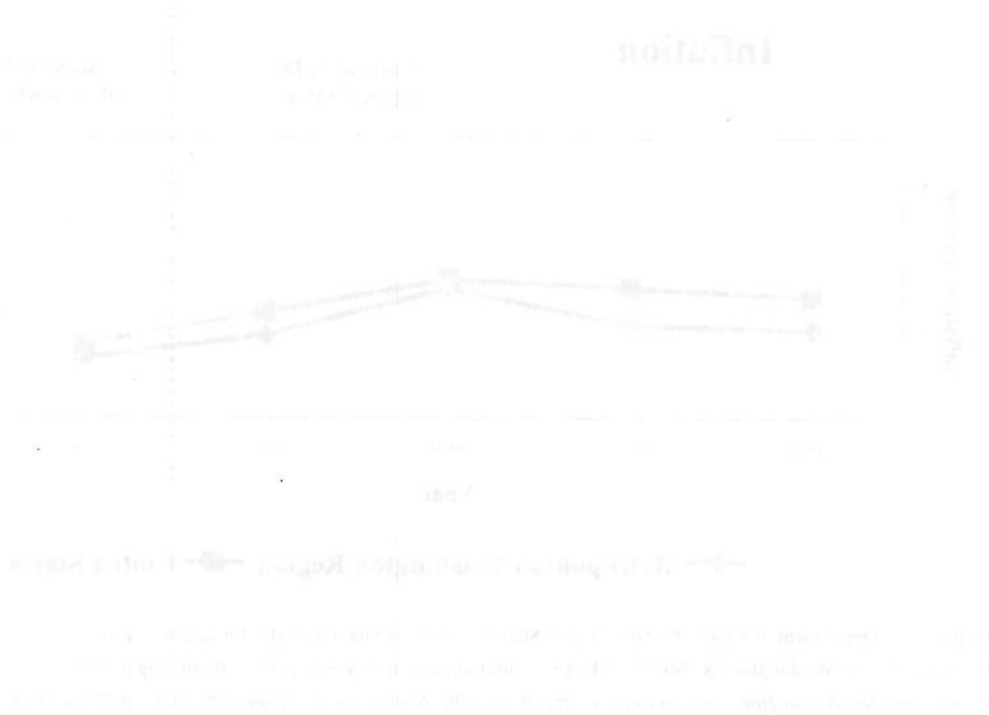
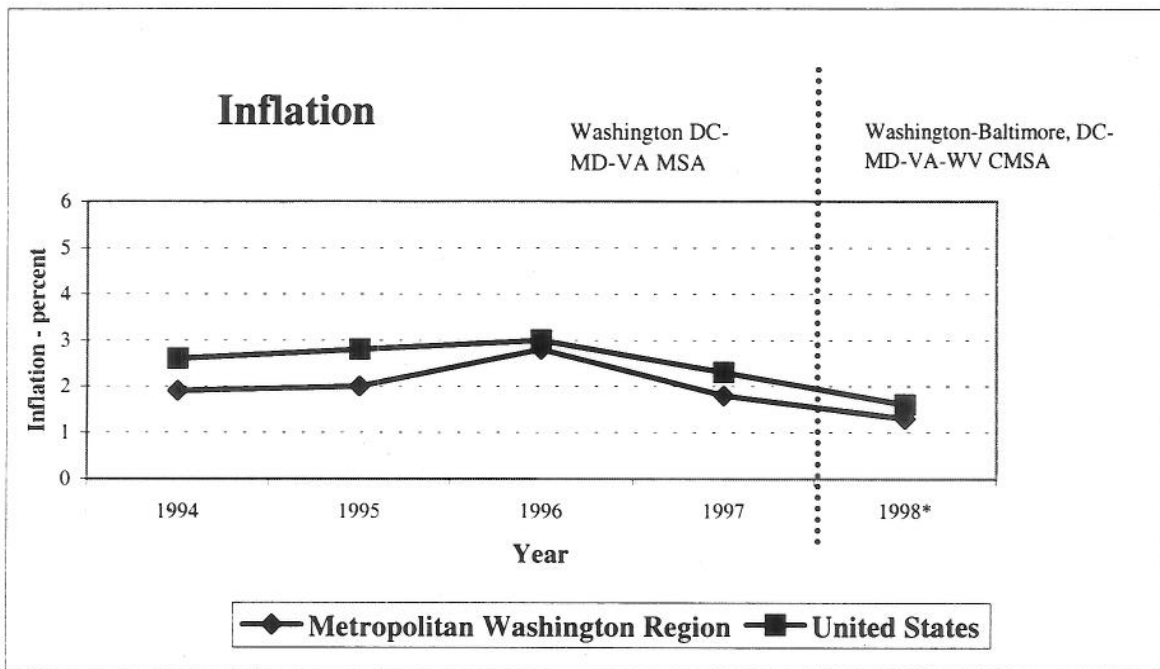


Table 12. Consumer Price Index and Inflation - All Urban Consumers in the Washington DC-MD-VA MSA, 1994-1998 (1982-1984=100)

	1994	1995	1996	1997	1998*
Metropolitan Washington Region					
CPI-U	152.2	155.3	159.6	162.4	102.1
Inflation Rate (%)	1.9	2	2.8	1.8	1.3
United States					
CPI-U	148.2	152.4	156.9	160.5	163
Inflation Rate (%)	2.6	2.8	3.0	2.3	1.6



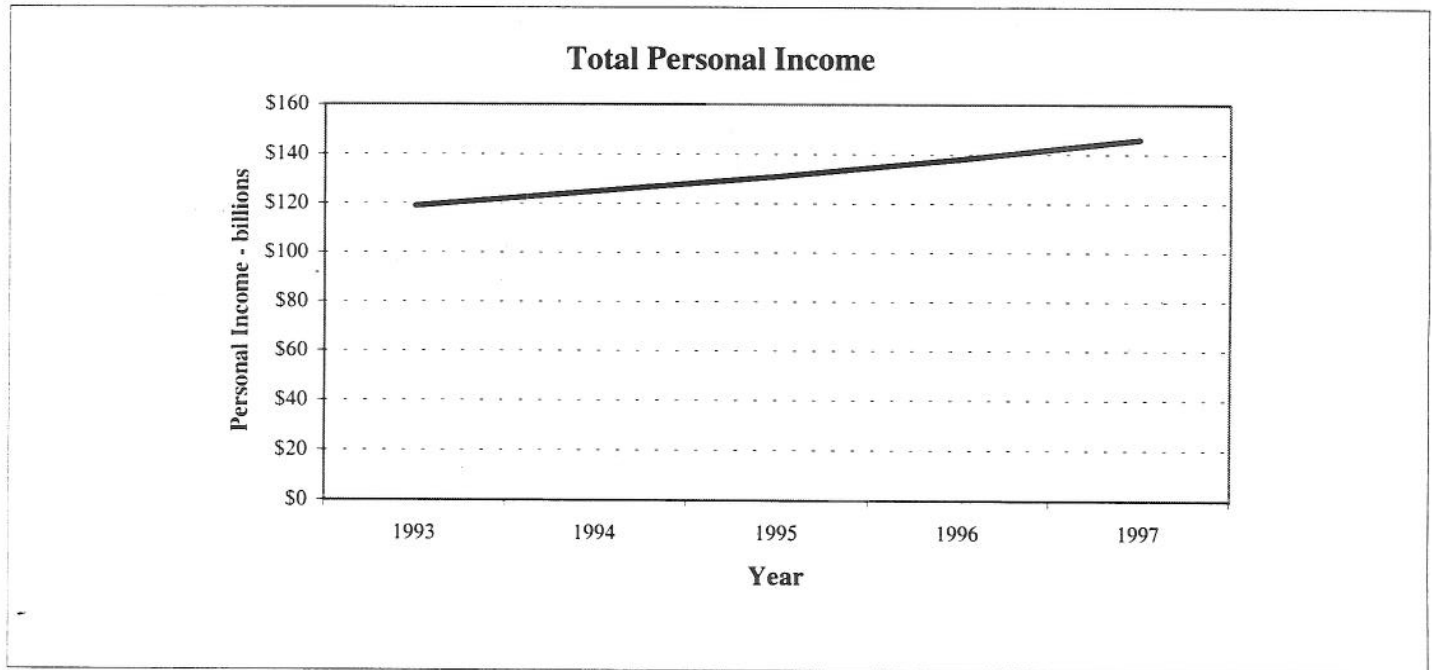
Source: U.S. Department of Labor, Bureau of Labor Statistics, "CPI Detailed Reports" for selected years.

* CPI data for the Washington DC-MD-VA MSA was discontinued in November, 1997. Beginning in 1998 the Metropolitan Washington region became a component of the Washington-Baltimore, DC-MD-VA-WV CMSA.

Table 13. Total Personal Income in the Washington DC-MD-VA MSA, by Jurisdiction, 1993-1997

(Thousand of dollars)

JURISDICTIONS	Year					Avg. Annual Percent Change 1993-1997
	1993	1994	1995	1996	1997	
District of Columbia	\$17,264,399	\$17,659,472	\$17,898,554	\$18,463,061	\$18,919,442	2.4%
Calvert County	1,296,188	1,406,764	1,469,558	1,601,710	1,754,686	8.8%
Charles County	2,268,583	2,405,596	2,498,152	2,623,442	2,800,896	5.9%
Frederick County	3,583,218	3,856,910	4,062,442	4,358,223	4,809,977	8.6%
Montgomery County	27,904,455	29,364,781	30,831,882	32,470,538	34,413,539	5.8%
Prince George's County	16,738,667	17,543,516	17,956,576	18,558,566	19,419,438	4.0%
Maryland Suburbs	\$51,791,111	\$54,577,567	\$56,818,610	\$59,612,479	\$63,198,536	5.5%
Arlington County	6,069,104	6,344,157	6,640,712	6,966,235	7,329,601	5.2%
City of Alexandria	4,028,543	4,280,609	4,539,348	4,787,494	5,088,810	6.6%
Fairfax County a/	30,317,531	31,740,861	33,627,392	35,584,297	37,769,439	6.1%
Loudoun County	2,730,679	3,091,294	3,353,370	3,725,517	4,222,379	13.7%
Prince William County b/	5,798,469	6,153,386	6,492,567	6,819,807	7,291,252	6.4%
Stafford County	1,346,225	1,453,107	1,541,420	1,680,377	1,831,377	9.0%
Virginia Suburbs	\$50,290,551	\$53,063,414	\$56,194,809	\$59,563,727	\$63,532,858	6.6%
Region Total	\$119,346,061	\$125,300,453	\$130,911,973	\$137,639,267	\$145,650,836	5.5%
Central Jurisdictions	\$27,362,046	\$28,284,238	\$29,078,614	\$30,216,790	\$31,337,853	3.6%
Inner Suburbs	\$74,960,653	\$78,649,158	\$82,415,850	\$86,613,401	\$91,602,416	5.6%
Outer Suburbs	\$17,023,362	\$18,367,057	\$19,417,509	\$20,809,076	\$22,710,567	8.4%



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System.

Data released May 1999. In 1997 BEA completed significant revisions to this data series for the 1992 to 1996 period.

a/ Data for the cities of Fairfax and Falls Church are included in Fairfax County.

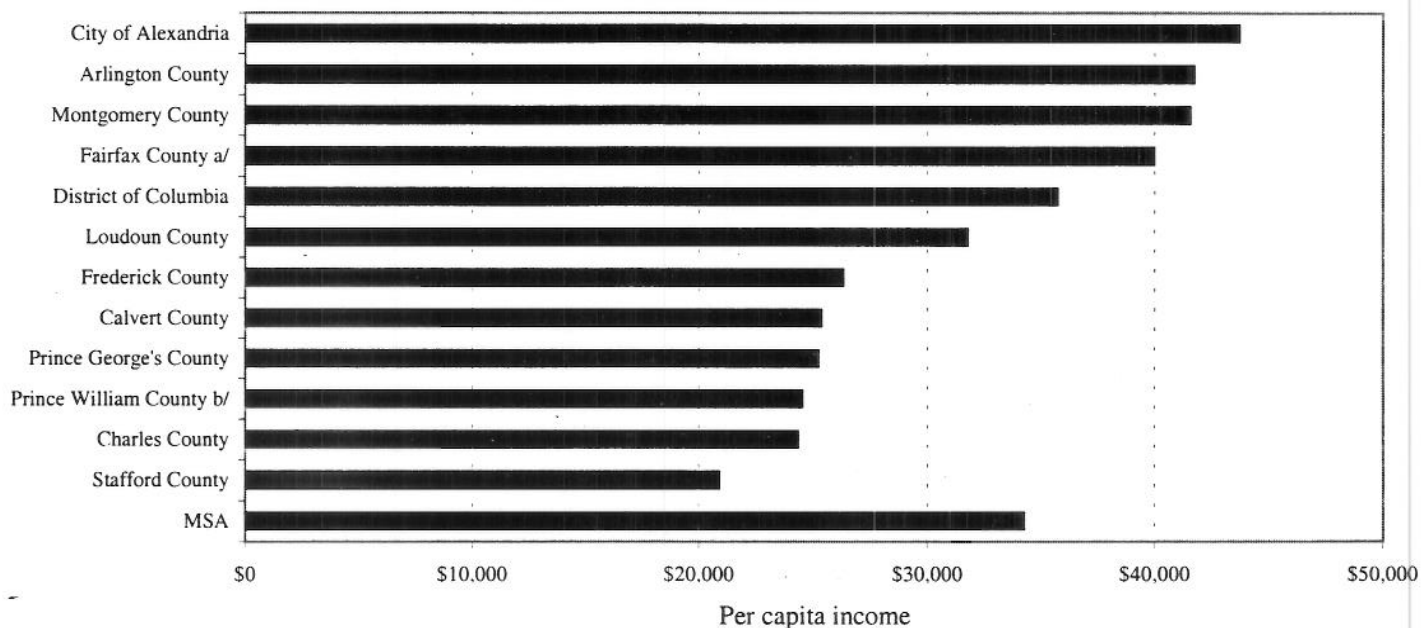
b/ Data for the cities of Manassas and Manassas Park are included in Prince William County.

Table 14. Per Capital Income in the Washington DC-MD-VA MSA, by Jurisdiction, 1993-1997

(Dollars)

JURISDICTIONS	Year					Avg. Annual Percent Change 1993-1997	Ratio to MSA 1997
	1993	1994	1995	1996	1997		
District of Columbia	\$29,912	\$31,212	\$32,398	\$34,213	\$35,704	4.8%	104%
Calvert County	21,756	22,670	22,834	23,992	25,310	4.1%	74%
Charles County	21,149	22,061	22,441	23,209	24,306	3.7%	71%
Frederick County	21,506	22,410	23,076	24,313	26,270	5.5%	77%
Montgomery County	35,408	36,917	38,354	39,936	41,539	4.3%	121%
Prince George's County	22,341	23,169	23,513	24,080	25,194	3.2%	74%
Maryland Suburbs	\$27,684	\$28,788	\$29,604	\$30,684	\$32,131	4.0%	94%
Arlington County	34,925	36,137	37,841	39,766	41,708	4.9%	122%
City of Alexandria	35,301	37,560	39,887	41,765	43,676	5.9%	128%
Fairfax County a/	33,965	35,097	36,707	38,265	39,951	4.4%	117%
Loudoun County	27,114	28,639	28,934	30,184	31,748	4.3%	93%
Prince William County b/	21,325	22,163	22,984	23,439	24,483	3.7%	71%
Stafford County	18,476	18,783	19,316	19,816	20,860	3.2%	61%
Virginia Suburbs	\$30,929	\$32,027	\$33,378	\$34,651	\$36,175	4.2%	106%
MSA	\$29,295	\$30,424	\$31,505	\$32,760	\$34,246	4.2%	100%

Per Capita Income, 1997



Source: U.S. Department of Commerce, Bureau of Economic Analysis (BEA), Regional Economic Information System.

Data released May 1999. In 1997 BEA completed significant revisions to this data series for 1992 to 1996 period.

a/ Data for the cities of Fairfax and Falls Church are included in Fairfax County.

b/ Data for the cities of Manassas and Manassas Park are included in Prince William County.

RETAIL SALES

Table 1. Retail Sales in the Washington DC-MD-VA MSA by Jurisdiction, 1992-1997

RETAIL SALES

Retail sales in the region increased in both nominal and real terms between 1992 and 1996. After slipping from \$43.7 billion in 1994 to \$43.2 billion in 1995, local retail sales rose to \$44.0 billion in 1996 (all figures in 1996 dollars). National retail sales also rose again in 1996 after declining (in real terms) between 1994 and 1995.

Year	Washington DC	Montgomery County, MD	Prince Georges County, MD	Rockville, MD	Stafford County, VA	Stafford County, VA	Total
1992	11,100	11,100	11,100	11,100	11,100	11,100	44,500
1993	11,100	11,100	11,100	11,100	11,100	11,100	44,500
1994	11,100	11,100	11,100	11,100	11,100	11,100	43,700
1995	11,100	11,100	11,100	11,100	11,100	11,100	43,200
1996	11,100	11,100	11,100	11,100	11,100	11,100	44,000
1997	11,100	11,100	11,100	11,100	11,100	11,100	44,000

Table 1. Retail Sales in the Washington DC-MD-VA MSA by Jurisdiction, 1992-1997

Year	Washington DC	Montgomery County, MD	Prince Georges County, MD	Rockville, MD	Stafford County, VA	Stafford County, VA	Total
1992	11,100	11,100	11,100	11,100	11,100	11,100	44,500
1993	11,100	11,100	11,100	11,100	11,100	11,100	44,500
1994	11,100	11,100	11,100	11,100	11,100	11,100	43,700
1995	11,100	11,100	11,100	11,100	11,100	11,100	43,200
1996	11,100	11,100	11,100	11,100	11,100	11,100	44,000
1997	11,100	11,100	11,100	11,100	11,100	11,100	44,000

Table 15. Retail Sales in the Washington DC-MD-VA MSA, 1992-1996

(Millions of dollars)

	1992	1993	1994	1995	1996
Washington DC MD-VA MSA					
Sales reported	\$35,636	\$38,145	\$40,886	\$42,033	\$44,042
Sales reported (1996 dollars)	\$40,280	\$42,073	\$43,707	\$43,197	\$44,042
United States					
Sales reported	\$1,951,589	\$2,075,083	\$2,231,233	\$2,340,817	\$2,464,706
Sales reported (1996 dollars)	\$2,248,196	\$2,320,602	\$2,422,702	\$2,409,936	\$2,464,706



Source: U.S. Department of Commerce, Bureau of the Census, Combined Annual and Revised Monthly Retail Trade, 1996. Retail sales data for 1997 will not be available until October 1999.

AIRLINE PASSENGERS

AIRLINE PASSENGERS

More than 46 million passengers flew into or out of the Washington region's three major airports in 1998, a 16.4 percent increase from 1994. Reagan National, with 15.8 million passengers, led the three airports. Dulles served 15.6 million passengers, and Baltimore-Washington International served 15 million.

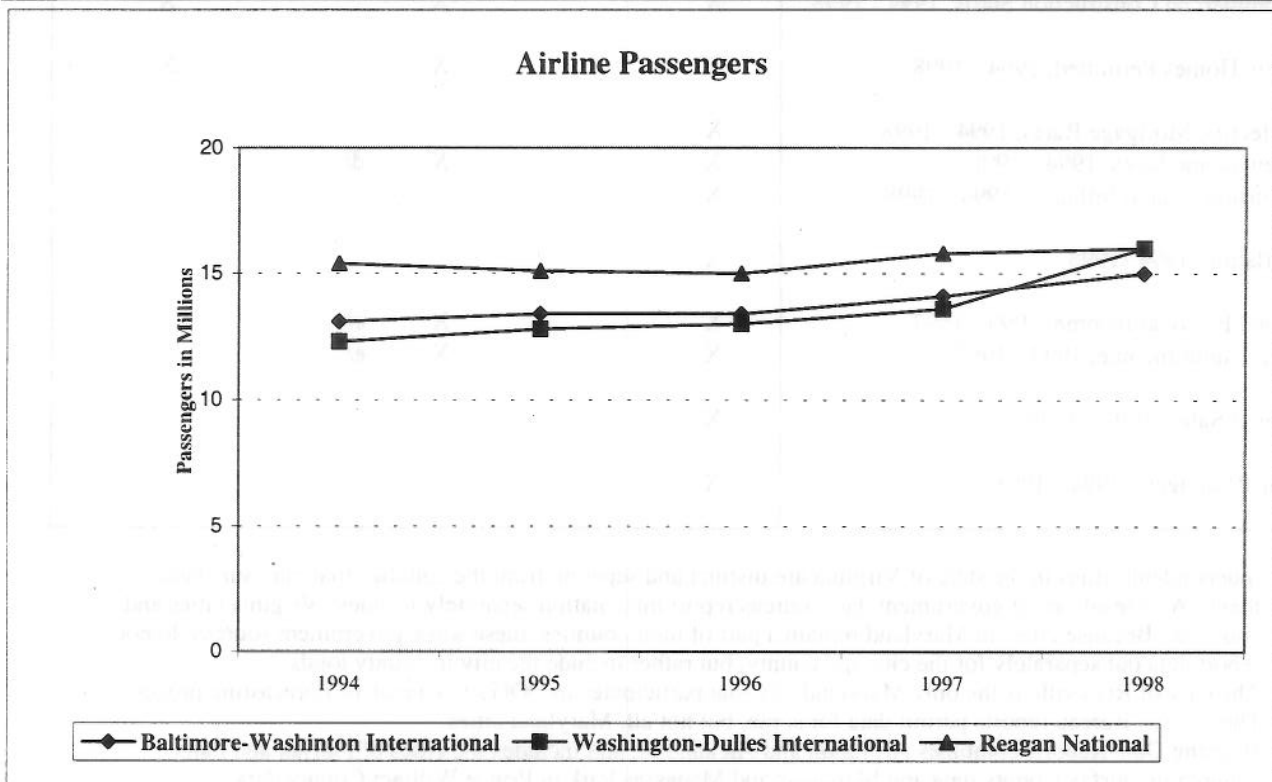
Airport	1994	1995	1996	1997	1998
Reagan National	13,500,000	14,000,000	14,500,000	15,000,000	15,800,000
Dulles	13,000,000	13,500,000	14,000,000	14,500,000	15,600,000
Baltimore-Washington International	11,000,000	11,500,000	12,000,000	12,500,000	15,000,000
Total	37,500,000	39,000,000	40,500,000	42,000,000	46,400,000



Table 16. Number of Air Passengers Traveling to or from BWI, Dulles, and Reagan National Airports, 1994-1998

(Thousands of Passengers)

	Year					Total Change 1994-1998	
	1994	1995	1996	1997	1998	Passenger	Percent
Baltimore-Washington International	12,817	13,163	13,432	14,094	15,004	2,187	17.1%
Washington-Dulles International	11,561	12,321	12,774	13,604	15,619	4,058	35.1%
Reagan National	15,517	15,386	15,096	15,774	15,809	292	1.9%
Total Air Passengers	39,895	40,870	41,302	43,472	46,432	6,537	16.4%



Source: Federal Aviation Administration and Maryland State Aviation Administration, BWI Airport Comparative Summary Activity; Dulles International Airport, Monthly Air Traffic Summary; Reagan National Airport Traffic Summary.

APPENDIX A

Appendix A. Geographic Specificity of Economic Trends Data

The data presented in this report come from a variety of sources, each with its own methodology and area of coverage. COG works to ensure that the data are presented for as many local governments as possible. Wherever possible, data prepared by COG - including population and commercial construction - include information for all COG member local governments. COG relies on other data sources, however, for much of the other information in this report and is dependent on the geography used by them.

Data Item	Geographic Specificity of Economic Trends Data		
	Region	Counties & Virginia Indep. Cities a/	All COG Members
Population, 1994 - 1998	X	X	X
Population Forecast, 1990 - 2020	X	X b/	
Employment, 1994 - 1998	X	X	
Employment Forecast, 1990 - 2020	X	X b/	
Federal Spending, 1994 - 1998	X	X	
Commercial Construction Starts, 1994 - 1998	X	X	X
New Homes Permitted, 1994 - 1998	X	X	X c/
Effective Mortgage Rates, 1994 - 1998	X		
New Home Sales, 1994 - 1998	X	X d/	
Housing-related Inflation, 1994 - 1998	X		
Inflation, 1994 - 1998	X		
Total Personal Income, 1993 - 1997	X	X e/	
Per Capita Income, 1993 - 1997	X	X e/	
Retail Sales, 1992 - 1996	X		
Air Passengers, 1994 - 1998	X		

a/ Independents cities in the state of Virginia are distinct and separate from the counties that may surround them. As a result, most government data sources report information separately for these Virginia cities and counties. Because cities in Maryland remain a part of their counties, these same government sources do not report data out separately for the city and county, but rather include the city in county totals.

b/ The City of Rockville is the only Maryland city that participates in COG's Cooperative Forecasting process.

c/ The Census Bureau reports permit data for some, but not all, Maryland cities.

d/ Housing Data Reports combines Arlington and Alexandria, and includes the cities of Fairfax and Falls Church in Fairfax County data and Manassas and Manassas Park in Prince William County data.

e/ The Bureau of Economic Analysis includes the cities of Fairfax and Falls Church in Fairfax County income data, and Manassas and Manassas Park in Prince William County data.

**Appendix Table 1. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY 1997**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1997 Total	
							Department of Defense	Non-Defense
District of Columbia	\$3,707,354	\$11,597,515	\$2,978,495	\$4,182,581	\$638,711	\$23,104,656	\$2,416,541	\$20,688,115
Calvert County	7,256	6,340	176,097	7,219	570	197,482	20,201	177,281
Charles County	25,063	165,167	298,907	37,487	1,314	527,938	215,791	312,147
Frederick County	40,234	146,204	389,090	67,687	3,055	646,270	149,958	496,312
Montgomery County	593,491	2,543,402	2,571,392	3,188,812	8,888	8,905,985	1,898,538	7,007,447
Prince George's County	254,942	1,552,732	2,077,872	2,279,404	10,616	6,175,566	1,175,436	5,000,130
Maryland Suburbs	\$920,986	\$4,413,845	\$5,513,358	\$5,580,609	\$24,443	\$16,453,241	\$3,459,924	\$12,993,317
Arlington County	139,316	2,901,818	649,606	1,948,104	4,345	5,643,189	3,397,906	2,245,283
City of Alexandria	74,180	453,393	680,292	1,430,886	4,574	2,643,325	1,752,996	890,329
Fairfax County	247,941	874,349	2,100,687	6,260,532	10,650	9,494,159	5,052,014	4,442,145
City of Fairfax	50,239	50,839	267,229	1,421,903	1,950	1,792,160	671,111	1,121,049
City of Falls Church	157,351	182,749	149,901	450,319	615	940,935	524,490	416,445
Loudoun County	16,911	197,111	207,799	210,972	5,143	637,936	97,716	540,220
Prince William County	39,280	340,897	403,632	153,302	1,285	938,396	556,684	381,712
City of Manassas	21,295	19,470	104,405	362,603	2,800	510,573	301,958	208,615
City of Manassas Park	4,272	0	2,407	414	0	7,093	242	6,851
Stafford County	16,330	6,654	140,969	1,807	406	166,166	27,335	138,831
Virginia Suburbs	\$767,115	\$5,027,280	\$4,706,927	\$12,240,842	\$31,768	\$22,773,932	\$12,382,452	\$10,391,480
MSA Total	\$5,395,455	\$21,038,640	\$13,198,780	\$22,004,032	\$694,922	\$62,331,829	\$18,258,917	\$44,072,912
Percent of Total	8.7%	33.8%	21.2%	35.3%	1.1%	100.0%	29.3%	70.7%
Central Jurisdictions	3,920,850	14,952,726	4,308,393	7,561,571	647,630	31,391,170	7,567,443	23,823,727
Inner Suburbs	1,303,964	5,204,071	7,167,081	13,600,970	32,719	27,308,805	9,321,589	17,987,216
Outer Suburbs	170,641	881,843	1,723,306	841,491	14,573	3,631,854	1,369,885	2,261,969

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1997.

NOTE: Grant locations represent location of initial recipient. Salary and wage locations represent place of employment. Procurement location is the place of performance, and other data are assigned to the recipient location.

APPENDIX TABLES

**Appendix Table 2. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY 1996**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1996 Total	
							Department of Defense	Non-Defense
District of Columbia	\$3,408,183	\$11,304,118	\$2,728,453	\$4,579,905	\$657,464	\$22,678,123	\$2,491,501	\$20,186,622
Calvert County	17,431	6,131	154,050	16,423	416	194,451	19,692	174,759
Charles County	36,655	148,082	276,169	70,924	740	532,570	227,490	305,080
Frederick County	79,639	128,797	358,064	71,934	2,501	640,935	153,774	487,161
Montgomery County	560,437	2,570,398	2,134,399	3,149,883	7,613	8,422,730	2,029,468	6,393,262
Prince George's County	406,526	1,469,136	1,916,304	2,156,232	9,244	5,957,442	1,259,688	4,697,754
Maryland Suburbs	\$1,100,688	\$4,322,544	\$4,838,986	\$5,465,396	\$20,514	\$15,748,128	\$3,690,112	\$12,058,016
Arlington County	136,923	2,954,753	534,163	1,995,203	3,476	5,624,518	3,556,669	2,067,849
City of Alexandria	73,294	589,035	522,190	1,039,566	4,091	2,228,176	1,410,904	817,272
Fairfax County	188,251	961,782	1,749,935	5,701,263	10,042	8,611,273	5,271,631	3,339,642
City of Fairfax	46,112	52,597	254,873	1,022,964	736	1,377,282	509,735	867,547
City of Falls Church	111,720	169,270	115,494	562,364	561	959,409	594,627	364,782
Loudoun County	20,825	187,580	166,514	162,711	4,190	541,820	57,910	483,910
Prince William County	37,024	310,502	415,119	197,062	1,055	960,762	611,787	348,975
City of Manassas	26,731	22,984	90,863	331,199	994	472,771	288,464	184,307
City of Manassas Park	1,389	416	2,567	599	0	4,971	881	4,090
Stafford County	10,134	6,859	131,283	1,698	249	150,223	32,978	117,245
Virginia Suburbs	\$652,403	\$5,255,778	\$3,983,001	\$11,014,629	\$25,394	\$20,931,205	\$12,335,586	\$8,595,619
MSA Total	\$5,161,274	\$20,882,440	\$11,550,440	\$21,059,930	\$703,372	\$59,357,456	\$18,517,199	\$40,840,257
Percent of Total	8.7%	35.2%	19.5%	35.5%	1.2%	100.0%	31.2%	68.8%
Central Jurisdictions	3,618,400	14,847,906	3,784,806	7,614,674	665,031	30,530,817	7,459,074	23,071,743
Inner Suburbs	1,313,046	5,223,183	6,171,005	12,592,706	28,196	25,328,136	9,665,149	15,662,987
Outer Suburbs	229,828	811,351	1,594,629	852,550	10,145	3,498,503	1,392,976	2,105,527

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1996.

NOTE: Grant locations represent location of initial recipient. Salary and wage locations represent place of employment. Procurement location is the place of performance, and other data are assigned to the recipient location.

**Appendix Table 3. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY 1995**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1995 Total	
							Department of Defense	Non-Defense
District of Columbia	\$3,045,893	\$11,393,771	\$2,685,702	\$4,092,937	\$694,101	\$21,912,404	\$2,142,583	\$19,769,922
Calvert County	16,702	6,824	135,296	3,198	223	162,243	19,070	144,174
Charles County	39,606	138,087	252,730	51,759	757	482,939	199,860	283,056
Frederick County	80,013	126,526	329,667	66,728	1,995	604,929	133,026	471,904
Montgomery County	612,983	2,527,775	2,040,579	3,326,603	8,070	8,516,010	1,964,544	6,551,465
Prince George's County	455,023	1,423,616	1,769,884	2,409,929	9,968	6,068,420	1,366,401	6,702,019
Maryland Suburbs	\$1,204,327	\$4,222,828	\$4,528,156	\$5,858,217	\$21,013	\$15,834,541	\$3,682,901	\$14,152,618
Arlington County	141,726	2,792,101	498,016	1,837,544	2,854	5,272,241	3,281,120	1,990,849
City of Alexandria	63,705	65,715	548,587	858,220	4,173	1,540,400	1,257,978	867,422
Fairfax County	244,798	877,860	1,828,969	4,752,279	12,108	7,716,014	4,213,568	3,302,444
City of Fairfax	49,785	46,008	243,966	1,315,518	749	1,656,026	531,745	1,126,282
City of Falls Church	125,282	168,824	121,557	123,599	575	539,837	198,089	341,747
Loudoun County	17,807	192,089	181,035	103,987	4,858	499,776	63,831	414,746
Prince William County	78,825	303,900	372,182	165,710	998	921,615	564,373	257,243
City of Manassas	19,727	22,011	94,513	265,019	3,379	404,649	249,768	154,880
City of Manassas Park	3,928	0	5,982	285,019	0	294,929	3,359	5,565
Stafford County	10,253	6,277	124,995	2,456	276	144,257	34,664	109,593
Virginia Suburbs	\$755,836	\$4,474,785	\$4,019,802	\$9,709,351	\$29,970	\$18,989,744	\$10,398,495	\$8,570,771
MSA Total	\$5,006,056	\$20,091,384	\$11,233,660	\$19,660,505	\$745,084	\$56,736,689	\$16,223,979	\$42,493,311
Percent of Total	8.8%	35.4%	19.8%	34.7%	1.3%	100.0%	27.6%	72.4%
Central Jurisdictions	3,251,324	14,251,587	3,732,305	6,788,701	701,128	28,725,045	6,681,681	22,628,193
Inner Suburbs	1,487,871	5,044,083	6,004,955	11,927,928	31,470	24,496,307	8,274,347	18,023,957
Outer Suburbs	266,861	795,714	1,496,400	943,876	12,486	3,515,337	1,267,951	1,841,161

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1995.

NOTE: Grant locations represent location of initial recipient. Salary and wage locations represent place of employment. Procurement location is the place of performance, and other data are assigned to the recipient location.

APPENDIX TABLES

**Appendix Table 4. Direct Federal Expenditures and Obligations
in the Washington DC-MD-VA MSA, by Jurisdiction, FY 1994**

(Thousands of Dollars)

JURISDICTIONS	Grant Awards	Salaries and Wages	Direct Payments for Individuals	Procurement Contract Awards	Other	Total	1994 Total	
							Department of Defense	Non-Defense
District of Columbia	\$3,173,517	\$11,415,021	\$2,613,049	\$4,103,030	\$858,335	\$22,162,952	\$2,328,902	\$19,834,050
Calvert County	17,864	11,433	139,102	6,462	188	175,049	21,127	153,921
Charles County	42,307	143,045	236,893	59,054	709	482,008	203,359	278,648
Frederick County	68,186	126,613	304,832	72,694	1,370	573,695	139,296	434,400
Montgomery County	650,674	2,587,321	2,217,125	2,751,439	3,728	8,210,287	1,975,569	6,234,717
Prince George's County	346,313	1,441,003	1,771,792	2,551,508	3,914	6,114,530	1,470,551	4,643,979
Maryland Suburbs	\$1,125,344	\$4,309,415	\$4,669,744	\$5,441,157	\$9,909	\$15,555,569	\$3,809,902	\$11,745,665
Arlington County	134,123	2,852,867	581,516	1,580,445	1,475	5,150,426	3,251,910	1,898,516
City of Alexandria	78,109	662,246	591,250	744,080	3,821	2,079,506	1,178,478	901,027
Fairfax County	211,637	1,009,086	1,747,100	4,725,201	4,619	7,697,643	4,007,808	3,689,835
City of Fairfax	47,323	43,035	209,002	636,378	269	936,007	361,131	574,875
City of Falls Church	117,676	192,737	137,368	123,381	192	571,354	194,735	376,619
Loudoun County	9,752	171,274	157,585	71,242	2,004	411,857	69,715	342,142
Prince William County	114,570	346,543	359,205	142,451	699	963,468	546,989	416,479
City of Manassas	19,984	17,846	72,233	305,642	2,984	418,689	306,312	112,376
City of Manassas Park	3,868	4,946	6,072	185	0	15,071	3,474	11,597
Stafford County	10,775	23,695	114,664	3,118	229	152,481	33,358	119,124
Virginia Suburbs	\$747,817	\$5,324,275	\$3,975,995	\$8,332,123	\$16,292	\$18,396,502	\$9,953,910	\$8,442,590
MSA Total	\$5,046,678	\$21,048,711	\$11,258,788	\$17,876,310	\$884,536	\$56,115,023	\$16,092,714	\$40,022,305
Percent of Total	9.0%	37.5%	20.1%	31.9%	1.6%	100.0%	28.7%	71.3%
Central Jurisdictions	3,385,749	14,930,134	3,785,815	6,427,555	863,631	29,392,884	6,759,290	22,633,593
Inner Suburbs	1,373,623	5,273,182	6,082,387	10,787,907	12,722	23,529,821	8,009,794	15,520,025
Outer Suburbs	287,306	845,395	1,390,586	660,848	8,183	3,192,318	1,323,630	1,868,687

Source: U.S. Dept. of Commerce, Economics and Statistics Administration, Bureau of the Census, Consolidated Federal Funds Report, FY1994.

NOTE: Grant locations represent location of initial recipient. Salary and wage locations represent place of employment. Procurement location is the place of performance, and other data are assigned to the recipient location.

APPENDIX B - Local Government Economic Development Offices

CITY OF ALEXANDRIA, VIRGINIA

Alexandria Economic
Development Program, Inc.
1055 N. Fairfax St. Suite 204
Alexandria, VA 22314
(703) 739-3820
(703) 739-1384 (fax)
alexecon@erols.com (email)

ARLINGTON COUNTY, VIRGINIA

Department of Economic Development
2100 Clarendon Blvd., Suite 709
Arlington, VA 22201
(703) 228-0808
(703) 228-3674 (fax)
arlington@smartplace.org (email)

CITY OF BOWIE, MARYLAND

City of Bowie Department of Planning
and Economic Development
2614 Kenhill Drive
Bowie, MD 20715
(301) 809-3047
(301) 809-2315 (fax)
cmcgee@cityofbowie.org (email)

CHARLES COUNTY, MARYLAND

Charles County Economic
Development Commission
8730 Mitchell Road
LaPlata, MD 20646
(301) 870-2309
(301) 934-7656 (fax)
edc@charles.cc.md.us (email)

DISTRICT OF COLUMBIA

Office of Assistant City Administrator for
Economic Development
441 4th St., N.W., Suite 1140
Washington, DC 20005
(202) 727-6365
(202) 727-6703 (fax)
dpattan-eom@dcm.gov (email)

FAIRFAX COUNTY, VIRGINIA

Fairfax County Economic
Development Authority
The Americana Center,
Tysons Corner
8300 Boone Blvd., Suite 450
Vienna, VA 22182
(703) 790-0600
(703) 983-1269 (fax)

CITY OF FALLS CHURCH, VIRGINIA

Economic Development Authority of Falls Church
119 Rowell Ct.
Falls Church, VA 22046
(703) 538-7079
(703) 538-7161 (fax)
dholmes@fallschurcheda.org (email)

FREDERICK COUNTY, MARYLAND

Economic and Community
Development Commission
Winchester Hall
12 East Church Street
Frederick, MD 21701
(301) 694-1058
(301) 631-2340 (fax)

CITY OF FAIRFAX, VIRGINIA

Economic Development Coordinator
10455 Armstrong Street
Fairfax, VA 22030
(703) 385-7862
(703) 385-7811 (fax)

LOUDOUN COUNTY, VIRGINIA

Loudoun County Department of Economic
Development
1 Harrison Street, SE - Suite 500
Leesburg, VA 20177
(703) 777-0426
Metro: (703) 478-1850 x426
(703) 771-5363 (fax)
wherits@loudounva.com (email)

APPENDIX B

CITY OF MANASSAS, VIRGINIA

Office of Community Development
9027 Center Street
Manassas, VA 22110
(703) 257-8223
(703) 257-5117 (fax)
rsnyder@ci.manassas.va.us (email)

MONTGOMERY COUNTY, MARYLAND

Office of Economic Development
101 Monroe Street, Suite 1500
Rockville, MD 20850
(240) 777-2000
(240) 777-2001 (fax)

PRINCE GEORGE'S COUNTY, MARYLAND

Prince George's County Economic
Development Corporation
4640 Forbes Boulevard, Suite 200
Lanham, MD 20774
(301) 429-3044
(301) 429- 8762 (fax)

PRINCE WILLIAM COUNTY, VIRGINIA

Department of Economic Development
10530 Linden Lake Plaza, Suite 105
Manassas, VA 20109
(703) 392-0330
(703) 392-0302 (fax)
pwcecondev.org (email)

SPOTSYLVANIA COUNTY, VIRGINIA

Office of Economic Development
4704 Southport Parkway
Fredericksburg, VA 22407-2657
(540) 891-2602
(540) 891-2605 (fax)
spotsyed@aol.com (email)

STAFFORD COUNTY, VIRGINIA

Economic Development Department
P.O. Box 339
Stafford, VA 22554-0339
(540) 658-8681
(540) 658-6651 (fax)
economicdev@co.stafford.va.us (email)

STATE OF MARYLAND

Department of Business and Economic
Development
217 E. Redwood St., 10th Flr.
Baltimore, MD 21202
(410) 767-6300
(410) 333-6911 (fax)

COMMONWEALTH OF VIRGINIA

Virginia Economic Development Partnership
2214 Rock Hill Road, Suite 602
Herndon, VA 22071
(703) 689-3059
(703) 689-3056 (fax)

THE GREATER WASHINGTON INITIATIVE

1129 20th St., N.W.
Suite 200
Washington, DC 20036
(800) 555-6783
(202) 466-4980 (fax)
gwi@bot.org (email)

METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS

777 North Capitol St., N.E. Suite 300
Washington, DC 20002-4226
(202) 962-3200
(202) 962-3201 (fax)
infocntr@mwcog.org (email)