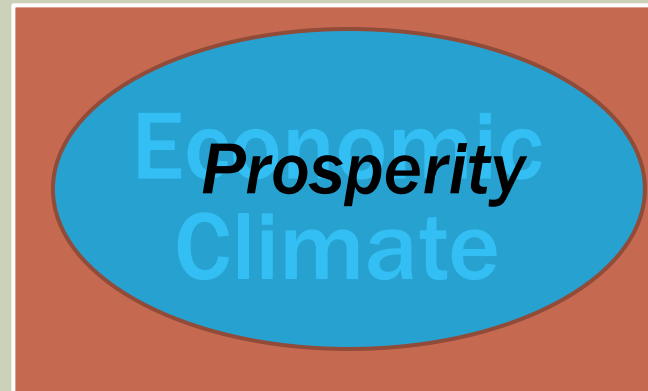
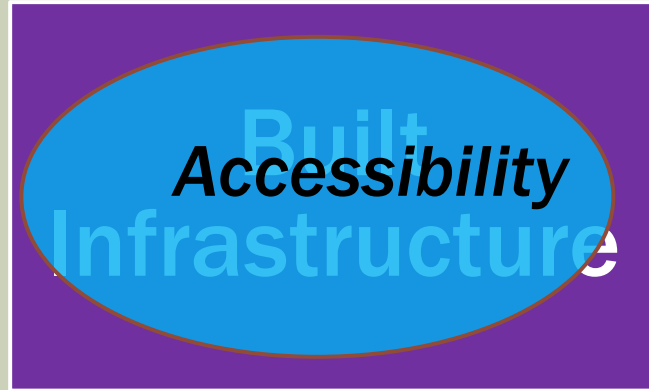


REGION FORWARD ECONOMIC COMPETITIVENESS INDICATORS UPDATE AND REPORT



Region Forward Coalition | October 23rd, 2015

FOUR PILLARS OF COMPETITIVENESS



BUILDING UPON REGION FORWARD

■ Region Forward 2.0

- Relevant
- Substantive
- Interactive
- Direction Setting
- Economy Forward
- Place + Opportunity
- Regional Transportation Priorities Plan
- Housing Security Study
- 2015 Infrastructure Report

+ Related Work by RF Partners:

- Brookings Institution
- George Mason University, Center for Regional Analysis
- Urban Land Institute
- Washington Regional Grant Makers
- Urban Institute

REGION FORWARD COALITION ECONOMIC COMPETITIVENESS

January: Dr. Stephen Fuller, GMU: *From Company Town to Global Business Center*

- *Decline in Federal government as economic driver*
- *Need to focus on exports, STEM and education at all levels*

April: Ken Ulman, University of Maryland: *Fearless Ideas – A Great University Town*

- *Culture of Innovation*
- *Startup Shell – incubators for students*

Dr. Terry Clower, GMU: *Improving the Region's Global Competitiveness*

- *“Global fluency”: the level of global understanding, competence, practice, and reach that a metro area exhibits in an increasingly interconnected world economy*
- *An agenda for Global Fluency in metropolitan Washington*

REGION FORWARD COALITION

ECONOMIC COMPETITIVENESS

July: Dr. Courtney Silverthorn: *Federal Lab Consortium for Tech Transfer (FLC)*

- *What is the role and changing relationship of the federal government in fostering innovation through the FLC?*
- *Technology Transfer (T²) Impacts in patents, licenses and income*

September: Bob Sweeney: *Washington 2024 Olympic Bid Chair*

- *Leveraging existing infrastructure, supporting planned transportation improvements*
- *Bipartisanship and regional unity*
- *Impact of negative perception of Washington*

STATE OF THE REGION: ASSESSING THE ECONOMIC COMPETITIVENESS OF THE NATIONAL CAPITAL REGION

- I. Introduction: Why Focus on Economic Competitiveness?
- II. What makes a region economically competitive?
- III. Economic Climate Assessment
- IV. Built Infrastructure Assessment
- V. Human Infrastructure Assessment
- VI. Quality of Life Assessment
- VII. Opportunities to strengthen our regional economic competitiveness

METRICS ANALYZED IN THE REPORT

- **Economic Climate & Innovation (Prosperity):**
 - Annual job growth
 - Growth in wages and Gross Regional Product (GRP)
 - Federal employment and procurement
 - Total employment
 - Core industry sectors
 - Patents issued
 - Academic and federal research tech transfer
 - SBIR + STTR funding
 - Venture capital
 - Fortune 500 presence
 - Philanthropy

METRICS ANALYZED IN THE REPORT

- **Built Infrastructure (Accessibility):**
 - Housing and job distribution in Activity Centers
 - Affordable housing region-wide
 - Affordable housing in Activity Centers
 - Commercial development, housing and job growth in Activity Centers
 - Housing and Transportation (H+T) costs in Activity Centers
 - Job accessibility by transit
 - Mode choice
 - Transportation infrastructure

METRICS ANALYZED IN THE REPORT

■ **Human Infrastructure:**

- High school graduation rate
- Educational attainment
- Labor force participation rate
- Job skill levels

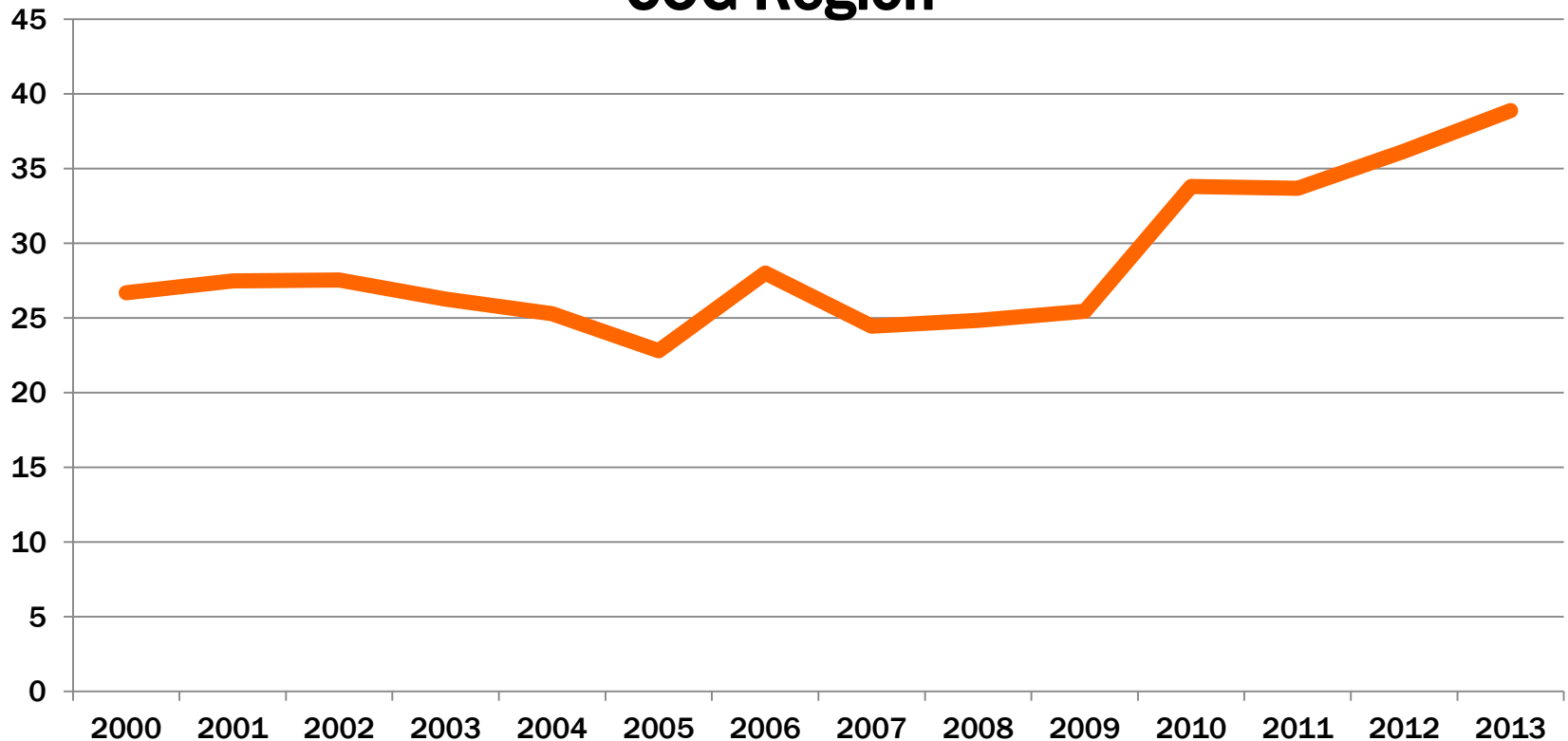
■ **Quality of Life (Livability & Sustainability):**

- Housing cost-burdened renters and owners
- Adult obesity
- Miles of bicycle and pedestrian infrastructure
- Poverty and concentrated poverty

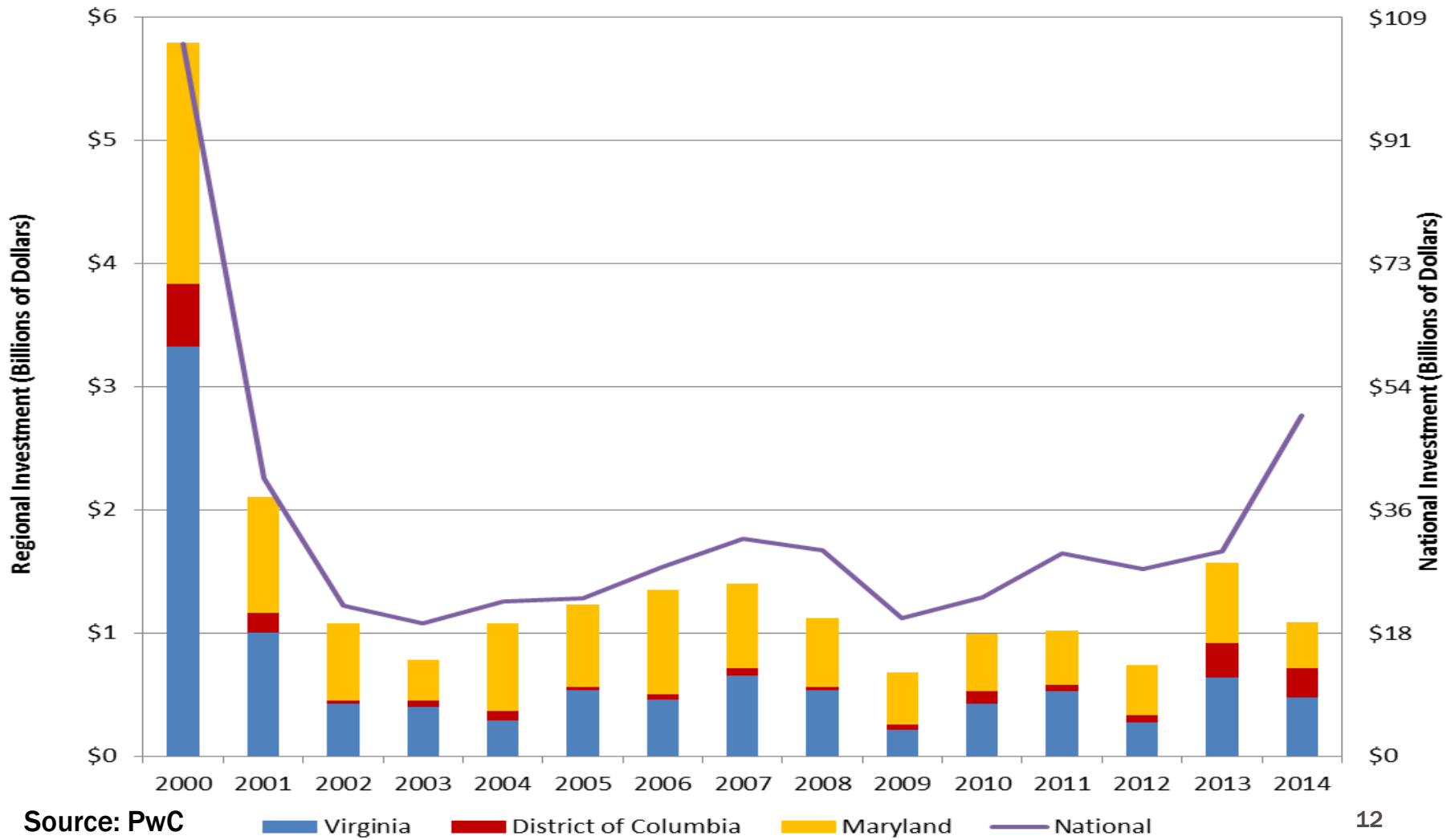
INDICATORS SNAPSHOT

ECONOMIC CLIMATE & INNOVATION: PATENTS

Patents Awarded Per 100,000 Residents COG Region



ECONOMIC CLIMATE & INNOVATION: VENTURE CAPITAL

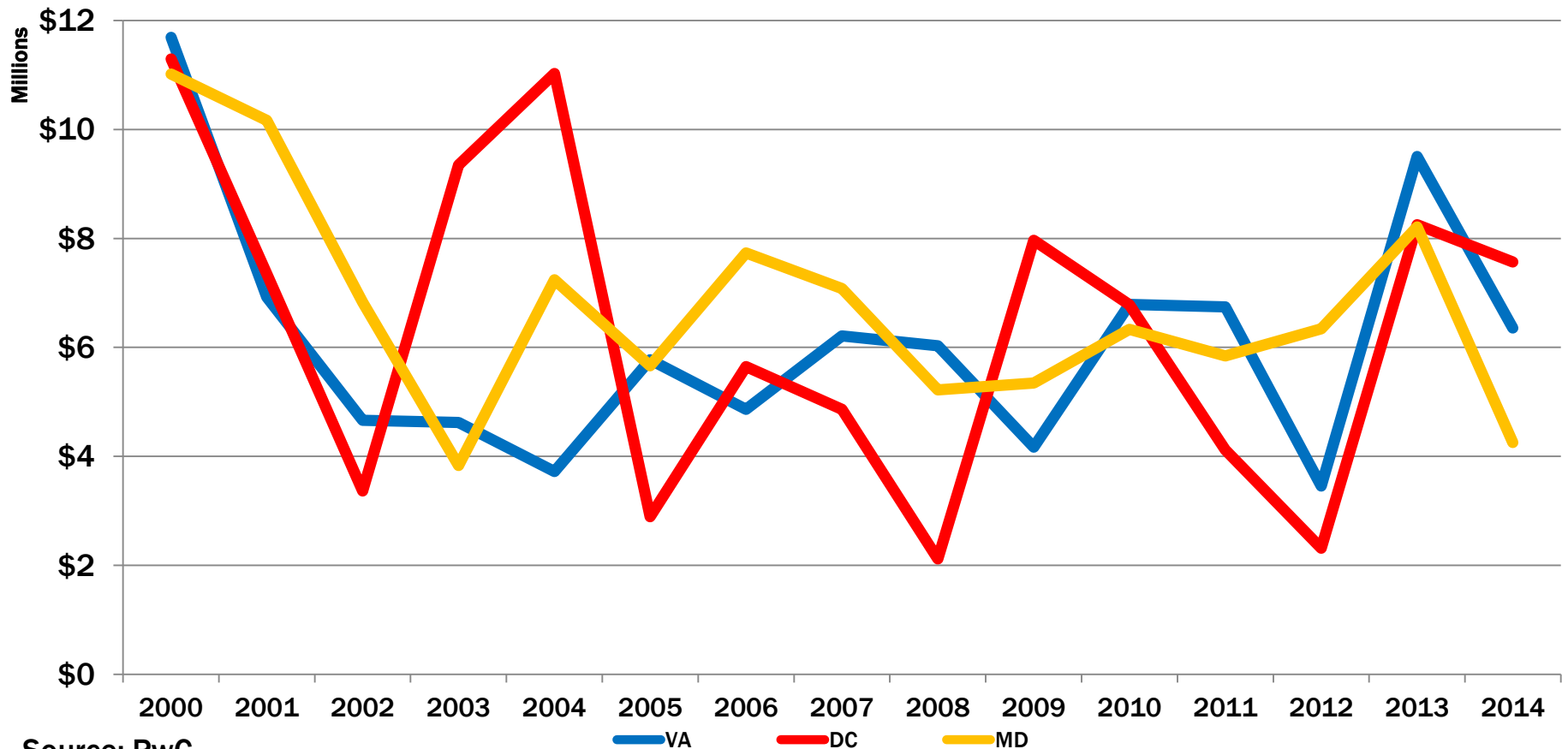


Source: PwC

■ Virginia
 ■ District of Columbia
 ■ Maryland
 — National

ECONOMIC CLIMATE & INNOVATION: VENTURE CAPITAL

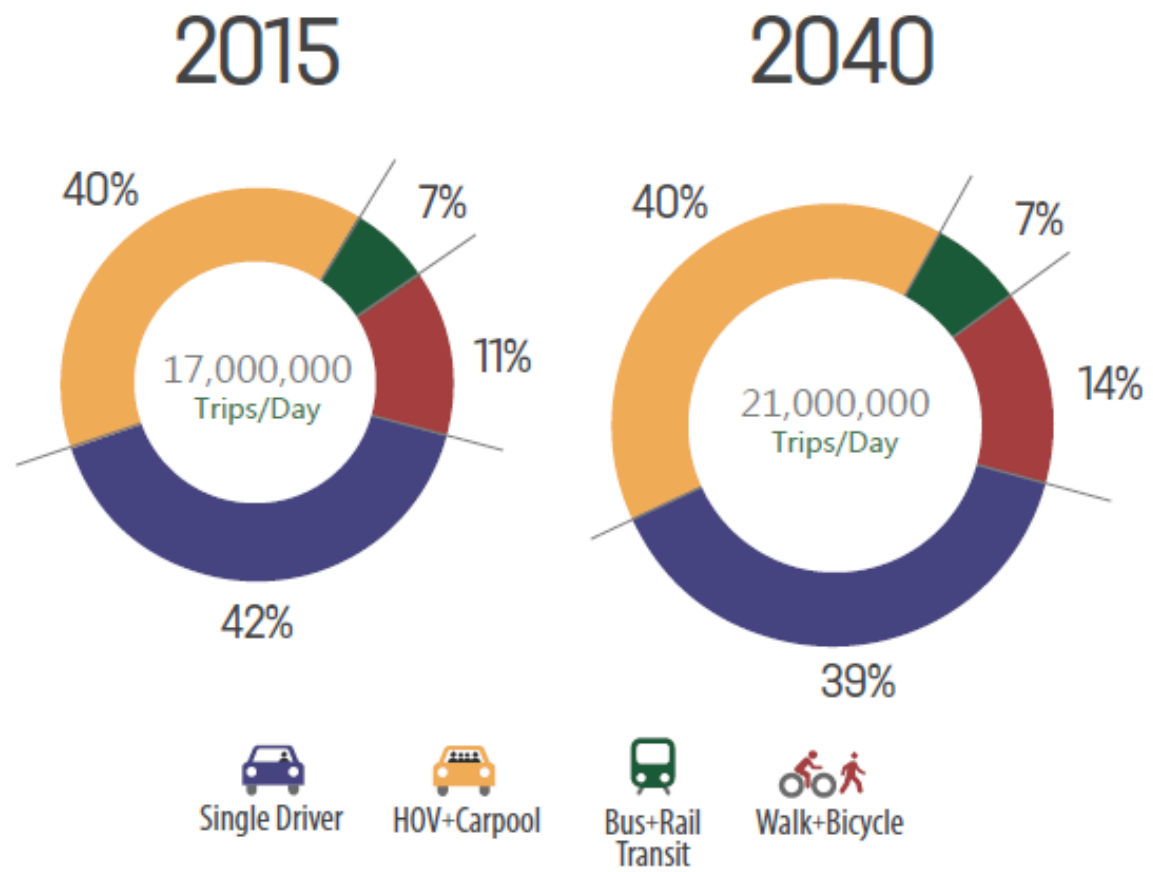
Venture Capital by Average Deal Value by State (\$ Millions)



Source: PwC

BUILT INFRASTRUCTURE: MODE SHARE OF DAILY TRAVEL

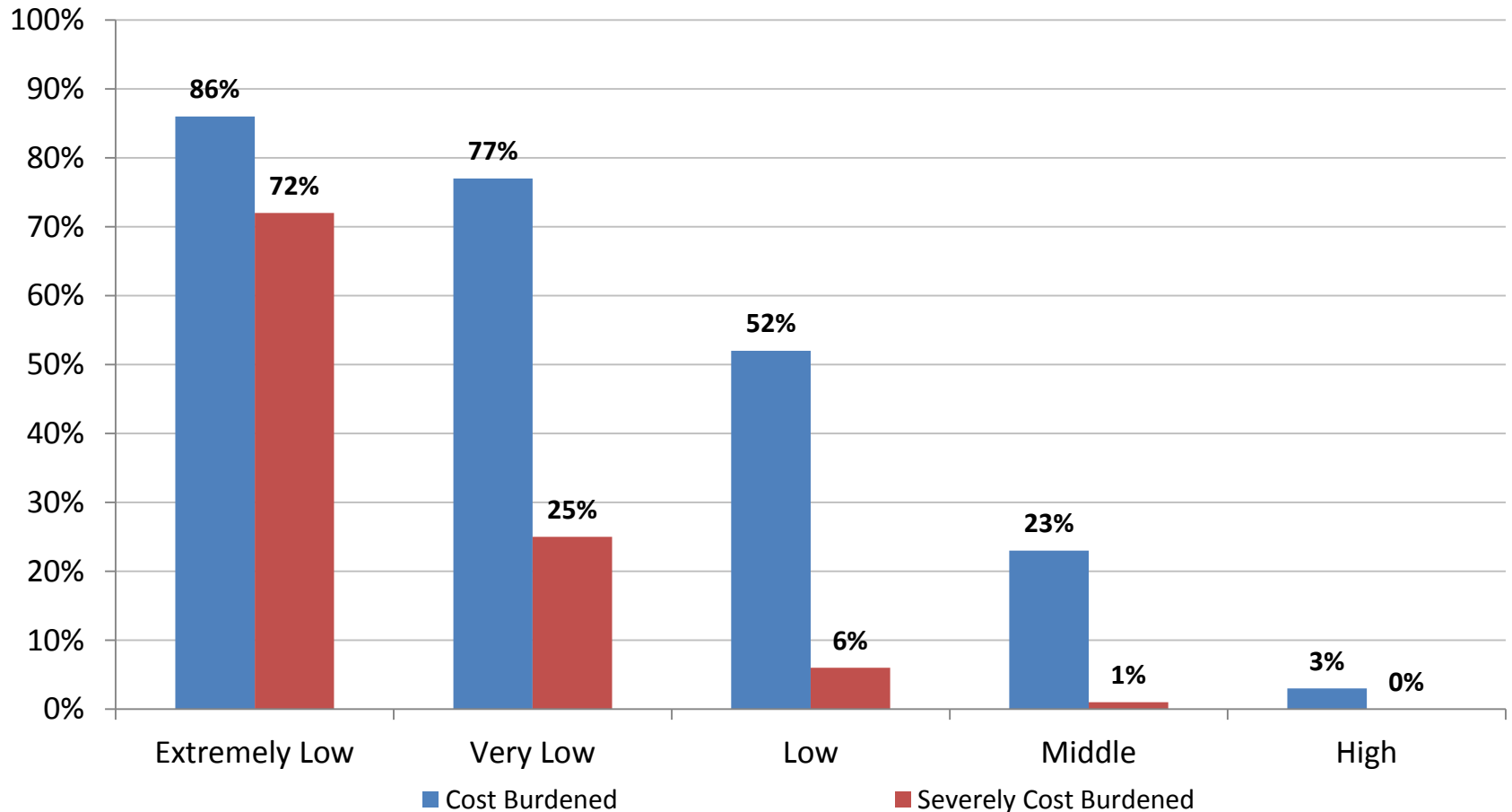
Daily Travel - Mode Share (2015-2040)



QUALITY OF LIFE: COST-BURDENED HOUSEHOLDS

Cost Burdened Renter Households by Income Level, 2009-2011

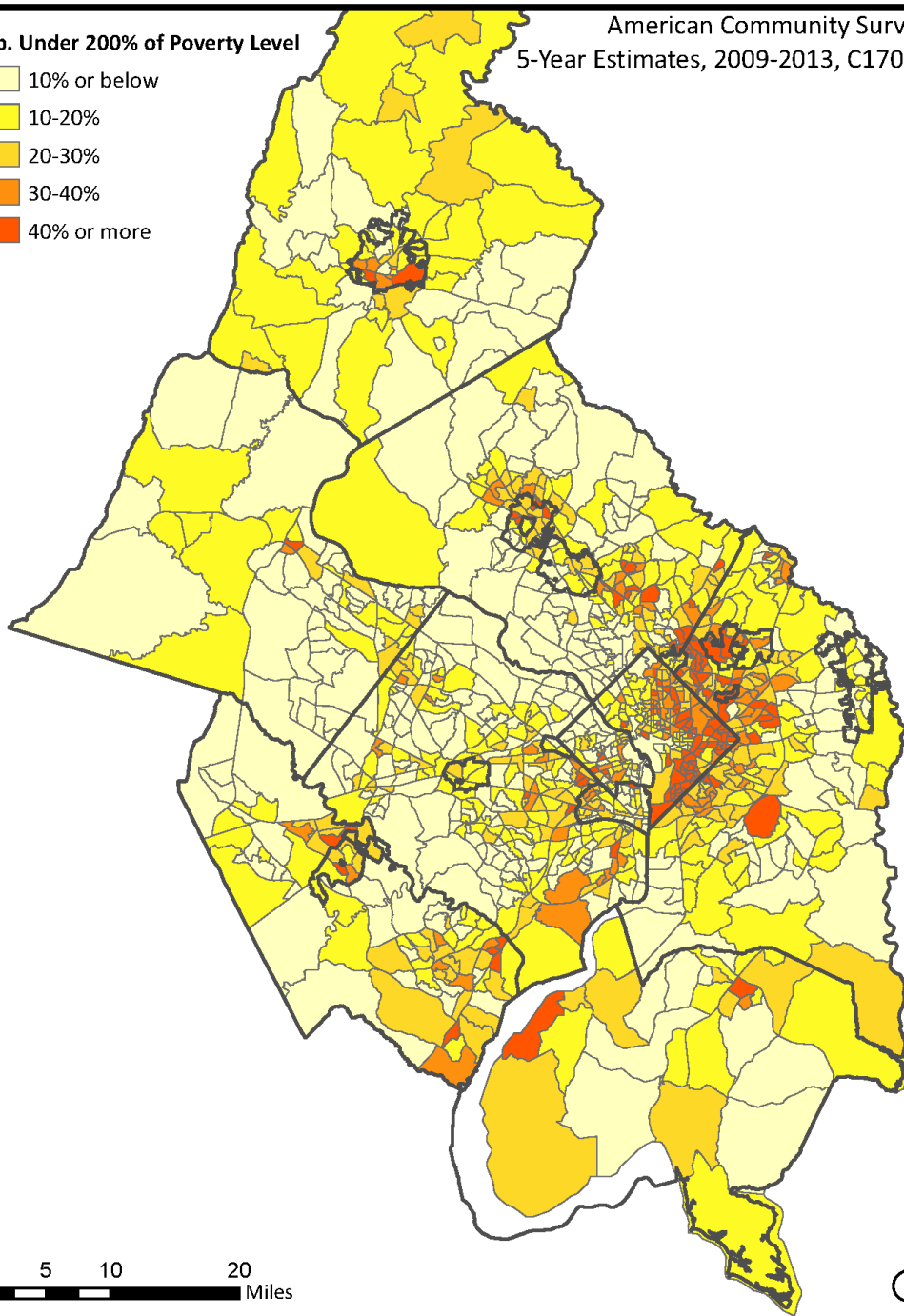
*Source: Housing Security in the Washington Region,
Urban Institute & Metropolitan Washington Council of Governments*



Pop. Under 200% of Poverty Level

- 10% or below
- 10-20%
- 20-30%
- 30-40%
- 40% or more

American Community Survey
5-Year Estimates, 2009-2013, C17002



QUALITY OF LIFE: CONCENTRATED POVERTY

REQUEST FOR THE COALITION: “COMPETITIVENESS SNAPSHOTS”

Examples of local/regional:

- Companies
- Industries
- Initiatives
- Policies
- Partnerships



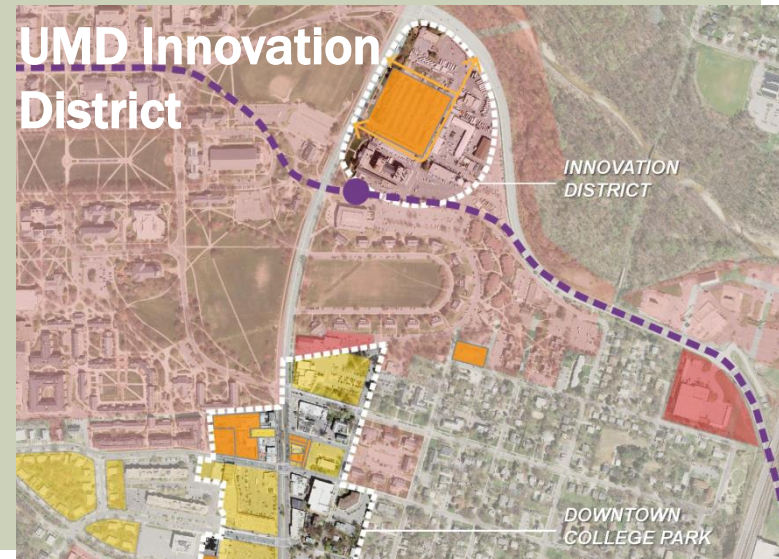
that highlight:

- Innovation
- Economic competitiveness
- Regional collaboration

1776



**Tyson's
Transformation**



NEXT STEPS

- **November 12 – COG Board review of report outline**
- **November / December – final updates to data, draft of report**
- **January 13, 2016 – COG Board receives final report**