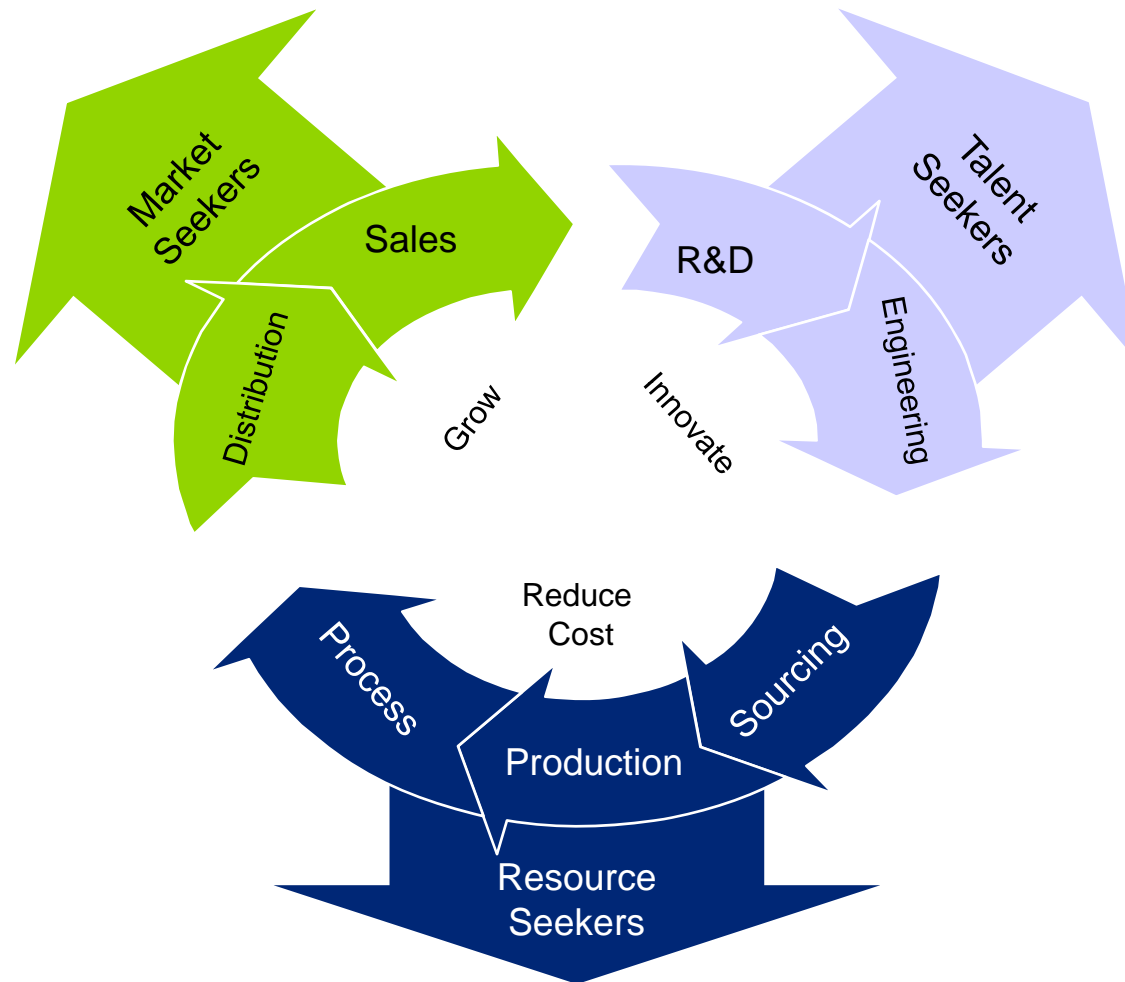




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Why do companies deploy resources?



Source: Deloitte Consulting

Value Proposition

- **Market:** Southeastern and Mid-Atlantic U.S are growing, diverse and dynamic
- **Talent:** Growth of the 24-35 year demographic continues to be strong, making it easier to hire locally and recruit internationally
- **Very High Asset/ Cost Ratio:** Attractive amenities coupled with a low cost of living. Airport, urban features, housing, and wages



Market

- **Mid Atlantic: DE, MD, NJ, NY, PA, DC, VA, WV**
 - Population: 57,871,146
 - Median Household Income: \$59,552
 - % Population 20-64: 60%
 - White Collar: 65%
- **Southeast: NC, SC, GA, FL, TN, AL, MS**
 - Population: 56,829,444
 - Median Household Income: \$49,531
 - % Population 20-64: 60%
 - White Collar: 59%



Targeted Sectors



Target Sectors 2009 - 2010

HEALTH



Sector Description

- Medical device manufacturing
- Biotech/Pharmaceutical mfg./Research
- Health care/Insurance information technology
- Health care back office support

Fast Facts

- Largest concentration of medical device manufacturing in the Carolinas
- More than 200 pharmaceutical/medical equipment manufacturing companies have facilities in the region
- 10,000+ workers employed in the health & life sciences sector
- Over 40,000 degrees awarded in science, engineering and technology disciplines from public universities in both states
- Home to 3rd largest public health care system in the U.S. - Carolinas Health Care System

Notable Assets

- North Carolina Research Campus, a \$1 billion 350-acre biotech campus in Kannapolis, NC, home to research programs of private biotech/health care companies and all research universities in the UNC system
- UNC at Charlotte's Bioinformatics Research Center \$35 million, 75,000sq ft facility housing wet/dry laboratories and core facilities for gene expression, proteomics, microscopy, crystallography and computing
- Community College workforce training programs offered in health/life sciences

Notable Employers

- BSN Jobet
- Grifone One
- Chetco Therapeutics
- Actavis Mid Atlantic
- Mikroban Products Company

DEFENSE



Sector Description

- Performance materials
- Unmanned systems & CAISR
- Military vehicles and aerospace components
- Fuel and power systems

Fast Facts

- Over 1,000 local companies have received Dept. of Defense contracts since 2000
- More than 8,000 engineers employed in the 16-county region
- 15 military installations within the Carolinas
- More than 40 nonstop daily flights to Washington DC

Notable Assets

- N.C. Military Foundation, N.C. Military Business Center and Charlotte Research Institute provide resources for business
- Center of Carolina's MicroOptics Triangle, formed by UNC Charlotte, Western Carolina University and Clemson University to integrate specialized R&D programs for defense & aerospace industry
- Defense & Security Technology Accelerator located at UNC Charlotte's Ben Craig Center, connecting military establishments, higher learning and centers of innovation
- Charlotte Research Institute campus houses Centers for Precision Metrology, Optoelectronics and eBusiness
- Home to four wind tunnel facilities and one water testing facility

Notable Employers

- General Dynamics Arm & Tech Products
- Goodrich Corporation
- BAE Systems
- Curtis-Wright Flight Systems
- Turbo Meca Saffm Group

ENERGY



Sector Description

- Power Generation Engineering
- Alternative energy component mfg.
- Energy efficiency materials systems mfg.
- Energy storage device manufacturing
- Vehicle technologies
- Corporate data centers

Fast Facts

- North Carolina first southern state to legislate renewable energy production and implementation measures by 2021
- More than 100 energy industry firms operating in the region, ranging from solar panel mfg to nuclear engineering
- 1,400+ undergraduate engineering degrees awarded annually at major universities within 250 miles of Charlotte
- 39 power plants currently operating in the region, 12 nuclear reactors in the Carolinas, with six new potential units in the application process

Notable Assets

- Headquarters of Fortune 500 Duke Energy, one of nation's largest utilities
- Energy Production Infrastructure Center (EPIC) at UNC Charlotte training next generation of engineers capable of servicing/replacing/designing fossil fuel and nuclear infrastructure
- Home to Electric Power Research Institute's R&D headquarters facility
- UNC Charlotte's Lee College of Engineering, a leading university for engineering, science and technology

Notable Employers

- Duke Energy
- Siemens
- Shaw Power Group
- URS/Washington
- PPG Industries

FINANCE



Sector Description

- Banking headquarters and operations
- Financial services support and service operations
- Financial services IT operations
- Insurance headquarters and operations

Fast Facts

- Second largest banking center in the U.S.
- Over 40,000 employed in the region's finance and insurance industry
- Home to eight Fortune 500 headquarters
- More than 25 call centers operating locally; 10+ call centers employ more than 500 workers
- More than 11,000 residents registered with NASD licenses
- 25,000 IT workers in region; roughly one out of every four IT workers in Carolinas employed in Charlotte region
- Financial services and insurance activities account for nearly one third of GDP for the Charlotte metro area

Notable Assets

- Home to one of largest trading floors in North America
- To date, UNC Charlotte's Bank College of Business has graduated more than 16,000 students with degrees in accounting, business information systems, economics, finance, management and marketing
- UNC Charlotte home to College of Computing and Informatics and Center for eBusiness Technology, working with financial sector for IT security solutions

Notable Employers

- Bank of America
- Wells Fargo/Wachovia
- TIAA-CREF
- IBM
- Landing Tree

MOTORSPORTS



Sector Description

- Motorsports component manufacturing
- Automotive/truck manufacturing
- Energy storage/battery technology

Fast Facts

- 90% of NASCAR teams located within 50 miles of Charlotte
- Estimated \$5 billion economic impact to region
- More than 500 firms operating locally in the motorsports industry
- 300 motorsports degrees awarded annually from UNC Charlotte

Notable Assets

- Motorsports and automotive engineering degrees offered at UNC Charlotte, specialties include vehicle dynamics, aerodynamics, instrumentation, safety and metrology
- Strong engineering technology support programs at community colleges in region
- Three leading-market wind tunnels provide accurate aerodynamic testing
- Home to Lowe's Motor Speedway and the newly opened iMAX Dragway
- NASCAR R&D Center houses rules officials, corporate officers, accident investigators and directors of three official NASCAR series
- NASCAR Technical Institute provide technological expertise and workforce training
- NASCAR Hall of Fame scheduled to open in uptown Charlotte 2010

Notable Employers

- Hendrick Motorsports
- Lowe's Motor Speedway
- NASCAR
- Dalmar North America
- FMC Lithium

FILM



Sector Description

- Feature and Independent films
- Commercials
- Music videos, Industrials
- Still photography
- TV production

Fast Facts

- Annual economic impact to the region estimated at \$300 million
- Proven location for major feature films that include Leatherheads, Talledega Nights, Snafu, Hal and the Patriot
- More than 65 commercials shot on location in region each year
- Named Productions Center in the 2001 and 2006 IATSE Areas Standards Agreement
- Home to four major equipment companies, numerous sound stages and a strong crew base

Notable Assets

- Competitive tax incentives; new legislation recently passed in North Carolina, tax credits increased to 25%
- Variety of location options from rural to urban settings
- More lighting and grip equipment resources located here than anywhere else on the East Coast

Notable Employers

- Cinelease Inc.
- Illumination Dynamics
- Hollywood Rentals
- Barlizon
- Production companies with regional and national experience

Notable new companies



Daimler Trucks North America





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