

N.C. Department of Commerce
Business & Industry Development
Competitive Intelligence

NCEDA Mid-Winter Conference
March 4, 2011

THRIVE

in NORTH CAROLINA

Top Competitors

U.S. Competitors

1. South Carolina
2. Virginia
3. Georgia
4. Texas
5. New York

International Competitors

1. Mexico
2. Canada
3. China
4. United Kingdom

Based on 89 active projects

THRIVE
in NORTH CAROLINA

Top Competitors – Won Projects

U.S. Competitors

1. South Carolina
2. Virginia
3. Georgia
4. Texas
5. Tennessee
6. California

International Competitors

1. Mexico
2. China
3. Brazil
4. Denmark
5. Germany
6. France

Based on 126 announced projects

THRIVE
in NORTH CAROLINA

International Project Destinations

Projects

1. California
2. New York
3. Texas
4. Florida
5. **North Carolina**
6. Georgia

Jobs Created

1. California
2. Texas
3. New York
4. **North Carolina**
5. Indiana
6. Georgia

THRIVE

in NORTH CAROLINA

Top Competitors – Lost Projects

U.S. Competitors

1. Virginia
2. South Carolina
3. Georgia
4. Florida
5. Ohio
6. Tennessee

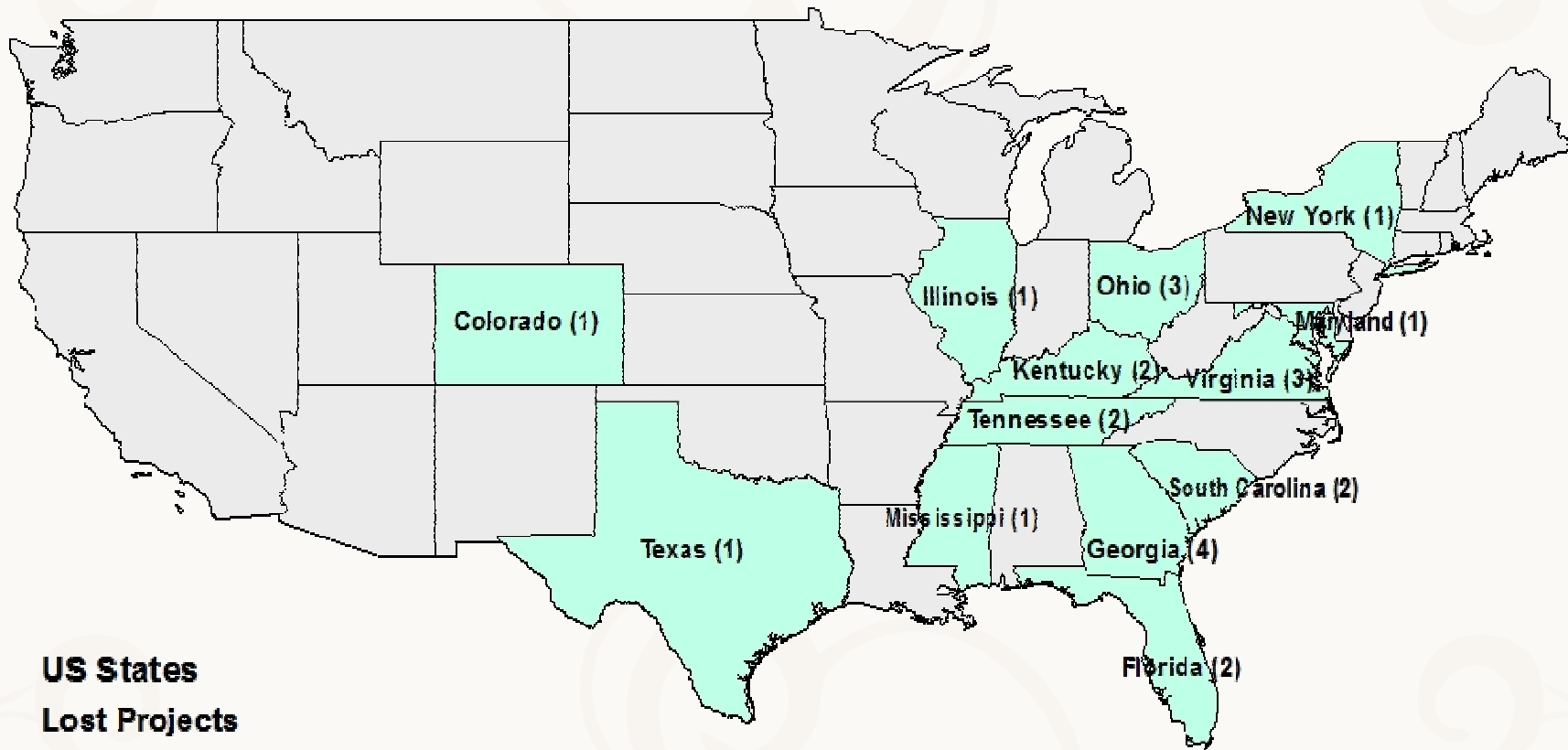
International Competitors

1. Canada
2. European Countries

Based on 117 Closed -Lost projects

THRIVE
in NORTH CAROLINA

Where Losses Located in 2010



US States

Lost Projects

1 - 4

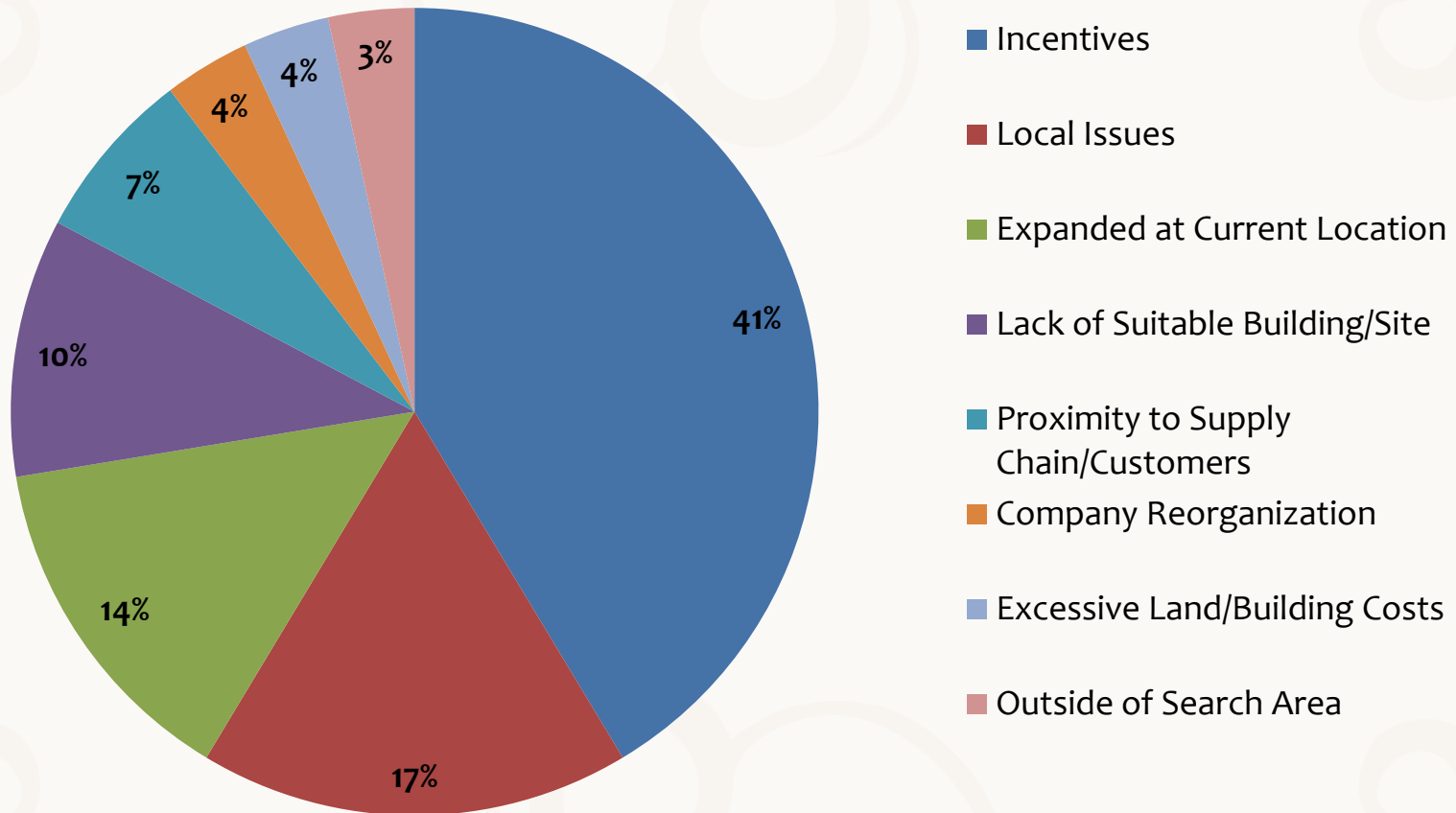
Unknown: 5 Projects

Based on 29 project losses in 2010

THRIVE

in NORTH CAROLINA

2010 Opportunities Closed/Lost



Based on 29 projects closed lost in 2010

124 Projects "Closed Dead" and 26 Projects "Closed Lost"

THRIVE

in NORTH CAROLINA

Top Ranked Site Selection Factors

1. State/Local Incentives
2. Low Union Profile/Right-to-Work State
3. Availability of Skilled Labor
4. Tax Exemptions
5. Labor Costs
6. Transportation Infrastructure

THRIVE

in NORTH CAROLINA

Competitiveness Function

- Purpose: Address need to actively track, analyze and respond to enhance competitiveness
- No new resources in sight, so includes existing capacity from PRSP, B&I and Marketing
- Actively work with partners

THRIVE

in NORTH CAROLINA

Competitiveness Function

- Track data for NC's competitors: legislative changes, project announcements, leadership priorities, etc.
- Inventory/compare incentive programs and tax structures
- Analyze key issues and present to leadership (ex. single factor sales apportionment, site infrastructure/mega site incentive)

THRIVE

in NORTH CAROLINA

Competitiveness Function

- Use information to develop and pursue long-term economic strategy for NC
- Assess NC's and competitor industries by concentrations of companies, employment, and specific occupations (ex. Financial Services)
- Provide recruitment/expansion targets and improve NC's preparation for competitive projects